Interactive Forms Manager *Frequently Asked Questions:*

User Management

How do I add a new user? (Portal)
1. Login as an administrator
2. Select Manage Users under "Administration"
3. Select Add Users
4. Fill in the required fields under Account Information
5. Assign the User as the role under Application Name
6. Click Save

How do I add a new user?
1. Login as a system administrator
2. Select User Management on the welcome page
3. Click Add New User
4. Fill in the required fields under Account Information
5. Assign the User as the role under Application Name
6. Click Submit

How do I delete a user? (Portal)
1. Login as an administrator
2. Select Manage Users under "Administration"
3. Select the user you would like to delete
4. Click Delete Selected
5. Click OK

How do I delete a user?
1. Login as a system administrator
2. Select User Management on the welcome page
3. Search for the user that you wish to delete and click on the user name
4. Click Delete at the bottom of the page

Timeout Period Management

Can the timeout period be extended? (Portal)
1. Login as a system administrator
2. Select "Global Settings" under "Administration"
3. Change the Session Timeout period
4. Click Save

Can the timeout period be extended?
1. Login as a system administrator
2. Select User Management on the welcome page
3. Click Configuration from the left menu
4. Click Delete at the bottom of the page
5. Select 1. Configure session timeout
6. Change the Session Timeout period
7. Click Save

Form Header and Logo Configuration

I would like our district logo and form headers to be invisible for submitters. Only visual at the top of our forms is the form.

Those are features we could achieve using our current system. To do this,

1. Login as an administrator
2. Select Configuration
3. Select Forms Header
4. Configure the District Logo and Form Information to be invisible by clicking "no"
5. Click Save

Deleting Forms

How to delete the old forms?

Both an administrator and a form manager have the ability to delete forms. We suggest deleting forms as a form manager, since the administrator will delete the form itself and all the information related to this form will be totally deleted from the system.

To delete a form as a manger:

1. Be assigned as a manager of the forms
2. Login as a form manager
3. Click Manage forms
4. Select the forms you would like to delete
5. Select Delete

This way the forms will be deleted from assigned approvers' forms' list and submitters' forms list.

Note: Before deleting forms as a form manager, please confirm with the administrator that "Deletion Permission for Forms Manager" under Configuration is selected "Yes".

Reassignment

Lynn is retired from our district. How to reassign Jane in place of her?

Please follow below steps to make the reassignment:

1. Login as an administrator
2. Click Reassign
3. Search for Lynn and click the icon 📝 to reassign
4. Select Jane from approver's dropdown list

5. Click Save

Note: To reassign permanently successfully, the current selected approver Lynn should be in a user group with approvers' role. Forms will stop going into Lynn's queue after the reassignment but the pending form already laid in Lynn's Processing Forms will remain there.

To add Lynn to a user group with approvers' role, please follow below steps:

1. Login as an administrator
2. Select "Manage User Group" under "Administration"
3. Select a user group with approvers' role
4. Select "Edit"
5. Select Lynn and move forward to the right box
6. Click Save

Home | Administration   My Desktop | My Account | Contact Support | Logout

Manage Users
Manage User Group
Add
View Application Roles
— Basic Inf
Manage Buildings
Group Nar
Manage Files
Descriptio
Global Settings
Manage Pages
Manage News & Information
— Role Infor
Manage Desktop
Applicatio
Portal Settings   Roles

FormsManager   ☐ Administrator ☐ User ☐ Approver ☐ Manager ☐ Form Creator
Calendar   ☐ Administrator ☐ Staff
Job Applicant Manager   ☐ Administrator ☐ HR Staff ☐ Hiring Manager
Directory   ☐ Administrator ☐ User
District Bid Manager   ☐ Administrator ☐ User
Professional Development Manager ☐ Administrator ☐ Approver ☐ Teacher
District Content Publisher ☐ Administrator
Intranet   ☐ User ☐ Editor ☐ Administrator
Elementary Report Card   ☐ Administrator ☐ Teacher ☐ Approver ☐ Manager
Gradebook   ☐ Administrator ☐ Manager ☐ Staff ☐ Teacher
ECommerce   ☐ Administrator
New Portal Administrator   ☐ Administrator

— Member Information
User Members:
Test 0515
test 0613 22edit
test 0906
test 09061
testuser 0923

Group Members:
[Group] BugTest
[Group] CalendarGroup
[Group] CCtestGroup
[Group] CS Group
[Group] DBMS Group

How do I create a new approver group using existing users? (Portal)
1. Login as a system administrator
2. Select Manage User Group under "Administration"
3. Click Add Group
4. Fill in the group name and description
5. Assign the approver role to the group users
6. Select the user members from the left box to the right
7. Click Save

How do I create a new approver group using existing users?
1. Login as a system administrator
2. Select User Management on the welcome page
3. Click Groups from the left menu
4. Click Add New Group
5. Fill in the group name and description
6. Assign the approver role to the group users
7. Click Add Members
8. Select the checkboxes correspond to the users and click Submit
9. Click Submit

Generating Assigned Form List

How can I generate a list of forms assigned to an individual approver?
1. Login as an administrator
2. Click Assigned Forms
3. Search for the approver and click the icon 🗐 correspond to the approver's name

Last Name Initial: (All) A B C D E F G H I J K L M N O P Q R S T U V W X Y Z   Approver Name:

Name	Approver	Manager
testuser 0927	▦	
testuser 0927new	▦	▦
Renie Adams		
Mark Addams		
Jane Agnes	▦	
Sherry Akers		
Cindy Alice	▦	
Wendy Alington	▦	

4. A list of forms assigned to the approver will be generated

Approver

Form Name	Level
Absence From Duty 7.13.10	1
Application For Use of School Facilities	1
Brandywine - Employee Action Request	2
Brandywine - Personnel Requisition	2
Bus Infraction Report	2
Class Cut Form Version 2	1
Criminal Records Check Form	1
Custodial Equipment Repair Request	1

Creating/Configuring Forms

How do I create a form without having an approval process to it?
1. Login as an administrator
2. Click Forms
3. Click Create Forms
4. Fill in the basic information and click Next
5. Click Remove this level and Next
6. Set up other configurations and click Finish

How can I set a form to be re-submitted?
1. Login as an administrator
2. Click Forms
3. Click the name of the form
4. Click Routing
5. Check the box "Allow Form Submitters to Resubmit the Form"
6. Click Save

How would I save a form before I submit it? I don't see that option in the form.
This option is set by form administrator, to allow the submitter to save a form:
1. Login as an administrator
2. Click Forms
3. Click the name of the form
4. Click Other Configurations
5. Check the box "Allow Form Submitter to Save the Form"
6. Click Save

The form is with two approval levels with two approvers. The approver at level two does not show in the drop down box when level one approver intends to submit the form.
This is most probably caused by the set of the form routing. To correct this,

1. Login as an administrator
2. Click Forms
3. Select the icon correspond to the form
4. Check the box as level one approver and level two approver

Current Location: Interactive Forms Manager > Administrator > Forms > Manage Routing

Manage Routing: Application for Computer Account

Approver Name ∠	E-mail Address	IT Department	HR (Final)
John Hanson	dev@astihyxt.com	☑	☐
James Lobert	dev@astihyxt.com	☐	☑

5. Click Save

We want a form to go to two people at one building. But I don't want the two people to get a copy of every form submitted including those from other buildings. Is there something we can do at our side?
As long as the template is the same, you can have another form set up for this building so that the form is completely separate. To do this:
1. Login as an administrator, select forms
2. Select create forms
3. Title the form something different specifically for this building
4. Input routing levels / approvers
5. Click Save
The end user will then have the responsibility to select the correct approver.

How does a "shared user account" work for forms?
For a shared user account, it means to create a new user account that both the individuals can share responsibilities. Both of the users would know the username and the password. For the email field, enter one of the individuals work email, then add the other individuals email to the notification level. That way both individuals will be notified via email of the form.

Is there a way to lower the number of routing levels without loss of information?
To lower the number of routing levels without loss of information, you will need to make sure that there are no forms in the approval process when you try to delete a certain routing level.
That is, you will need to check with all of the approvers for the specific form and make sure all of the related submitted forms have been processed completely (Approved or Denied by the final approver).
By doing this, all of the forms submitted before the change will not be impacted by the change of routing levels.

Configuring Public Forms

How to create a form for public?
1. Login as an administrator
2. Select "Forms" and click Create Form
3. Fill in related information and Select Public as the category
4. Fill in the rest information and Click "Finish"
5. Click the icon and get the public URL
You could post the link to your website and the public could access the form then.

The public submitted forms show anonymous, how can I change that?
1. Login as an administrator
2. Click Forms
3. Click the name of the form
4. Click Other Configurations
5. Check the box "Request Submitter Name and E-mail for Public Submissions"
6. Click Save

Reporting

How do I view/create a form submitted report?

Please follow these steps to view reports:

1. Login as an administrator
2. Select Reporting

This allows you to access all your district reports.

If I create a report under my admin account, can that be available to other managers?

The report created won't be available to other managers because of authority differences. But the reports created by form managers can be viewed by form administrators in the reporting list.

There is one way to allow the managers to view the report. To do this:

1. Click the report
2. Click Send by E-mail
3. Put receiver's email address and other information
4. Click Send

Managers will receive the email with reports attached.

I have created and saved a report based on Leave Requests. As new requests are submitted, will it update automatically when I open the report?

The report created will update automatically every day.

One of the submitters just deleted a form and when I generate a form submitted report, the form still shows up.

The system requires 24 hours to sync report generations with the major form changes. This includes deletion of form instances, form status changes. The information of the instance will no longer populate in reports after that timeframe.

There is one approved form that is not showing up on the report. When the search criteria is changed to include All as the status, that form, which has been approved shows up.

The short-approved form actually shows Pending in reporting since reporting only reflects yesterday's data not the same day. The system requires 24 hours to sync report generations with the major form changes. The information of the instance will no longer populate in reports after that timeframe.

I know that School Stream administrators have the option of running reports on all forms' data, but do SchoolStream users have this same option?

School Stream administrators have the option of running reports. Also, managers who are assigned as the manager of specific form could run reports on all managed forms. Users without administrator and manager's role couldn't run reports.

Form Template Management

How to delete a template?

For security mechanism, a template is not allowed to be deleted but you could inactivate the template as an option, this way the template will not show in the template list. Please follow below steps to inactivate a template:

1. Click the name of the template
2. Select Inactive under Status
3. Click Save

I need to change a template so that a numerical value is NOT a requirement for a field. I need the submitters to be able to use number and letter values in this filed.

The "Number" field type permits number values only. To permit number and alpha values, you must use the "Single Line of Text" field. Most likely, this will require you to delete the original "Number" field and replace it with a "Single Line of Text" field. Before you make such changes, always keep in mind: Deleting a field may result in the loss of data if this form has already been submitted.

How to copy an existing table to another area in the same template?
1. Login as an administrator
2. Click Templates
3. Click the name of the template
4. Find the table name you would like to copy and click the icon
5. Fill in field information
6. Select the Copy To area of this table.
7. Click OK

I'm not able to delete a table with calculations.
This is because the calculation table ties with other calculated fields. You have to modify/delete the calculated field first so that the calculation does not include the field, then it should allow you to delete.

Insert a hyperlink or a picture in a template.
1. Click Template under an administrator role
2. Select the template and click Add Fields
3. Select Hyperlink or Picture
4. Fill in the field title
5. Select the URL format
6. Enter the URL and click OK

What is the difference between updating a template and updating a form?
Updating the template involves making field/layout changes.
Updating the form involves making routing/notification changes.

Search scope and future search scope of each search feature.
Keyword Search
Scope. pdf

Internet Setting Issues

When I attempt to add HTML/Text Fields to a form, I just get a red X (broken link); If I edit an existing field, I see only the raw html.
This is most likely an issue with web browser's settings. Please follow the instructions at this link:
https://www.astihosted.com/asti/Help/IE7Troubleshooting.asp
Please make sure close your browser completely (and maybe even restart your computer) for the change to take effect.

I've made changes to one of our forms, but these changes are not reflected in "edit" mode - so therefore I can't go back and make more changes. I'm using IE8.0.
This is most likely related to browser settings. Please follow below steps to troubleshoot:
1. Select Tools at the top right of your browser
2. Select Internet options
3. Click Browsing history settings
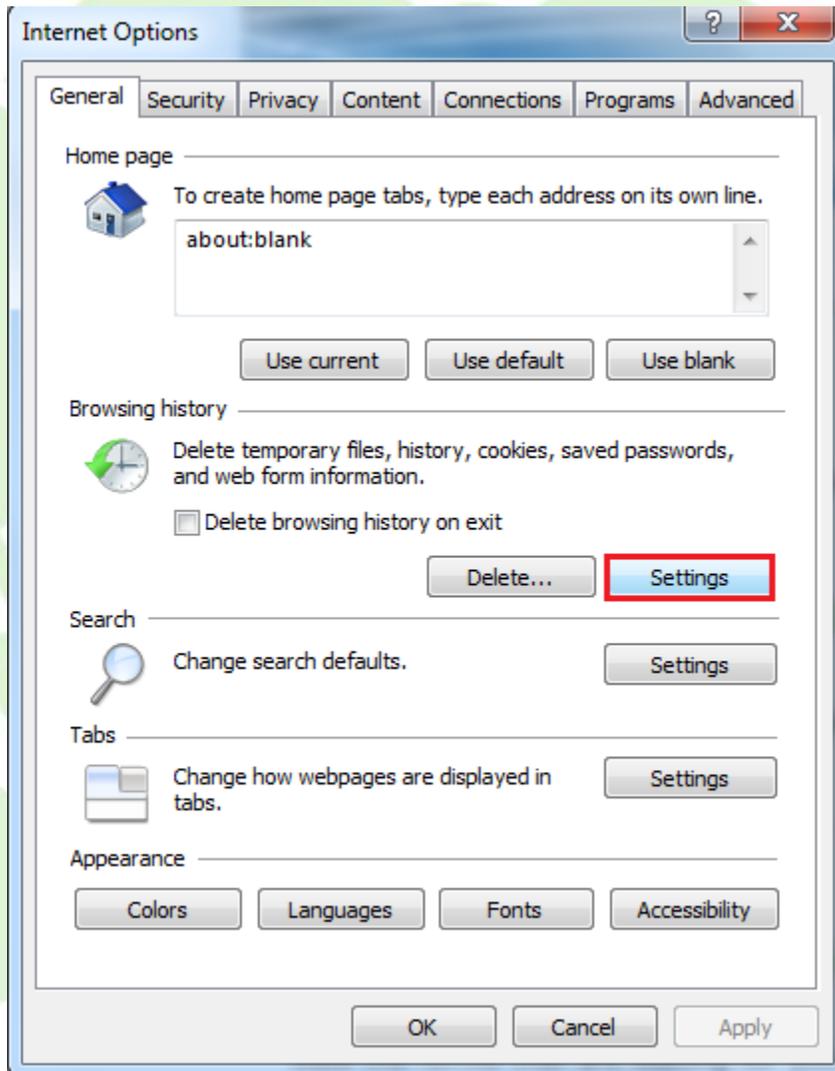
4. Check "every time I visit the web page" under newer versions of stored pages
5. Click OK

I am trying to export the absence excuse forms. We override the same file each time when we save it- temp.csv.
This issue is probably caused by browser settings. Can you please tell me what browser you are currently using? Please follow the instructions under below link to reset your internet settings:
https://www.astihosted.com/asti/Help/IE7Troubleshooting.asp
Please make sure close your browser completely (and maybe even restart your computer) for the change to take effect.

When I click the link on My Desktop, I can't open a new tab and it goes forward to another website.
This issue is caused by browser settings. You should be able to modify your settings to allow you to open up new tabs when you click a link. To do this:
1. Select Tools at the top right of your browser
2. Select Internet Options
3. Select Settings under General tab
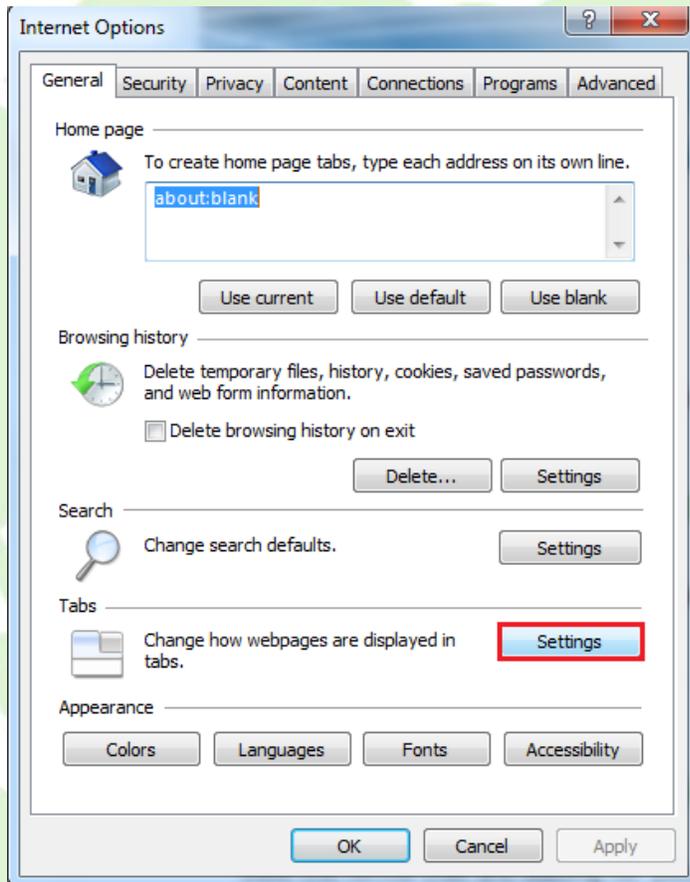
4. Select Always Open pop-ups in a new tab
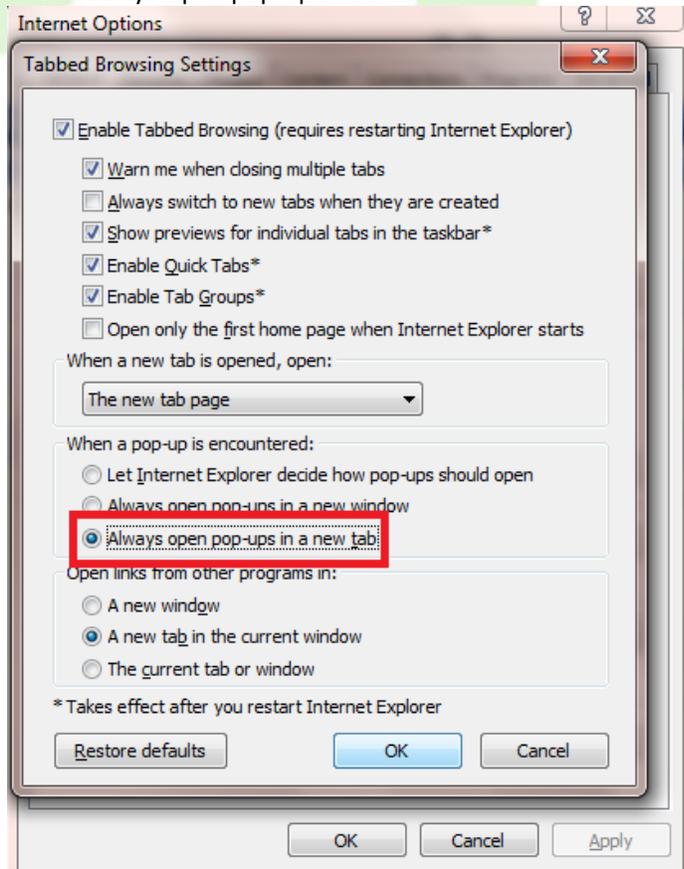
5. Select OK

When I attempt to export data from one form using the Export All button, a window flashes, but it does not seem to download. I do not have pop-ups blocked.
It looks like that it has something to do with internet browser settings. Please follow the below instructions to troubleshoot:
1. Select Tools at the top right of your browser
2. Select Internet Options
3. In "Internet Option" dialog, choose the "Security" label, then click "Custom level..." button.
4. In "Security Settings" dialog, set the "Automatic prompting for file downloads" to be enabled.
5. Click "OK" button
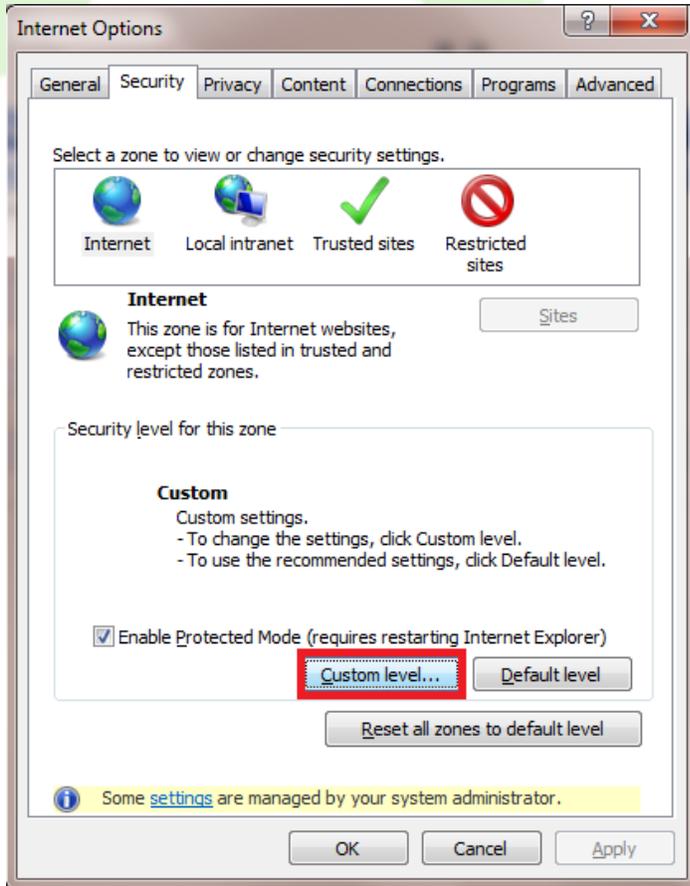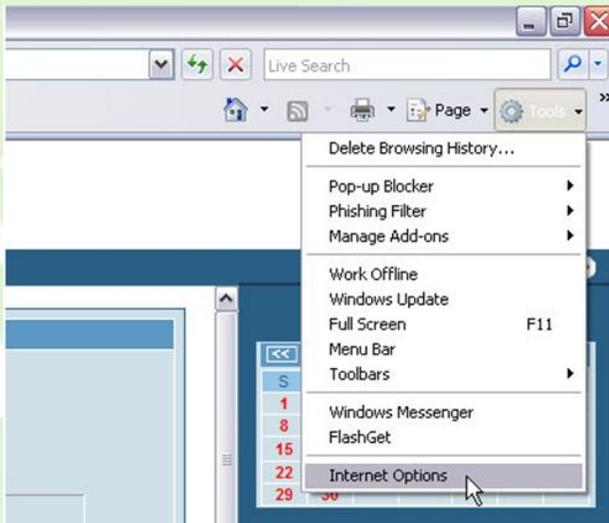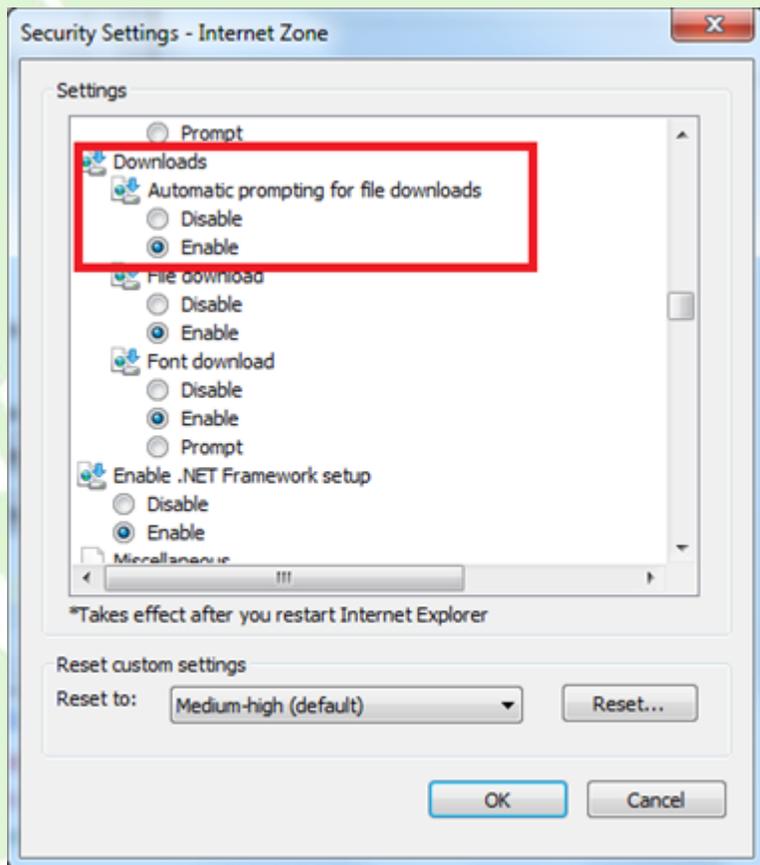
I cannot open MANAGED FORMS in Internet Explorer, but I can open in Google Chrome.

Please follow the below instructions to troubleshoot:

1. Select Tools at the top right of your browser
2. Select Internet Options
3. In "Internet Options" dialog, choose the "Security" label, then click "Custom level..." button.
4. In "Security Settings" dialog, set the "Automatic prompting for file download" to be enabled.
5. Click "OK" button.