SchoolStream

The proven way to save
Time, Labor, & Materials!

User Manual

SchoolStream
Forms Manager

Release Version 10.6

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Administrator

Create a new form

1. Click **Forms** on the top menu.
2. A list of the current forms in the system is displayed.
3. Click **Create Forms**.
4. Go to the create form pages' **Basic Information** wizard.
5. Select the form template to use for the form using the **Form Template** dropdown list.
6. Enter the Name of the form in the **Form Name** text box.
7. Enter a brief description of the form in the **Description** text box.
8. Enter additional form instructions in the **Form Instruction** text box.
9. Select the **Category** to file this form under by moving the desired categories from the left list box to the right list box.

   Note: If you would like to give the public access to the form, select a public category (see Form Category Management section to know how to create a public category).
10. If the new form will be **inactive**, check the Inactive checkbox followed by the **Status** text box.
11. Click the **Next** button to navigate to the **Routing** wizard.
12. Click the **Add Approval Level** links to add a routing level and enter the position or department names of each of the routing levels in their **Name** text boxes.
13. Click **Remove this level** links to delete the routing level.
14. Enter instructions regarding the routing of this form in the **Instructions** text box.
15. Select approver for the form by moving the desired users from the left list to the right list in **Approvers** list box.

   Note: You will specify corresponding routing levels in the Manage Routing page for these selected approver. If a user group was selected, all users in this group will be able to be appointed as approver of that routing level.
16. Uncheck the **Show Routing Instructions** check box to turn off routing instructions if desired.
17. Uncheck the **Allow System to Decide the Submission Level** check box to make the submitter be asked to choose the routing level if he/she is an approver.
18. Uncheck the **Allow Form Approvers to Update the Form Content during Approval Process** will prevent the approver from updating the form.
19. Check **Allow Form Submitters to Resubmit the Form** check box to allow the approver to choose to allow the submitter to resubmit the form if denied.
20. Check **Allow Form Approvers to Make the Final Approval of Form at Each Level** check box to allow the approver to make final approval at each level.
21. Click the **Next** button to navigate to the **Other Configurations** wizard.
22. Select managers for the form by moving the desired users from the left list to the right list in the **Managers** list box.

   Note: If a user group was selected, all of the users of the user group will be appointed as manager of that form.

23. Uncheck the **Request Submitter Name and E-mail for Public Submissions** check box to not require the submitter's name and e-mail address for public submissions.
24. Uncheck **Allow Form Submitter to Save the Form** check box to prevent submitter from saving this form.
25. Check **Allow System Generate Unique IDs** to generate unique ID numbers for this form.
26. Click the **Finish** button.

Modify an existing form

1. Click Forms on the top menu.
2. Click on the name of the form that you wish to modify.
3. The **Modify Form** page is displayed.
4. Make any modifications to the form as necessary.
5. Click **Save** button.

View a list of forms by category

1. Click **Forms** on the top menu.
2. A list of form templates is displayed.
3. Select a category from the **Filter by** dropdown box.

   Note: You can view all forms without any filter by selecting the **All Forms** option, filter out forms that are non-categorized by selecting the **All Categorized Forms** option, and filter out categorized forms by selecting the **All Non-Categorized Forms** option.

Assign approvers to routing levels

1. Click **Forms** on top menu.
2. Click the icon that corresponds to the form that you would like to modify the routing process for.
3. Go to **Manage Routing** page.
4. 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.

   Note: If a user group is appointed as approver of a routing level (by checking the routing checkbox), all the users of the user group will be appointed as approver of the routing level.

   If a user group or a user who belongs to the user group has been appointed as approver of a routing level, the user will be appointed as approver of the routing level.

   If a form's approver contains some user groups, and a user belongs to those user groups, if the user's status from checked to unchecked on a routing level, all the status of the user within any group will be set to unchecked on the routing level.
5. Click **Save** button.

Modify form notification information

1. Click **Forms** on the top menu.
2. Click icon that corresponds to the form that you would like to modify the notifications for.
3. For each routing level
   - To specify the users in the routing process that should be notified when the specific routing level has approved the form, check the checkboxes corresponding to the users under Approval Process Notifications.
   - 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**.
   - 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.
     - Click **Remove**.
4. Select which actions will trigger the notification of these users:
   - To notify the specified users when the specific routing level has approved the form, check the Approval textbox.
   - To notify the specified users when the specific routing level has denied the form, check the Denial textbox.
5. Click **Save** button.

Get form access URL

1. Click **Forms** on the top menu.
2. Click icon that corresponds to the form that you would like to view the access URL.

Delete a form

1. Click **Forms** on the top menu.
2. Click the icon that corresponds to the form that you would like to delete.
3. A deletion confirmation message appears, and clicks **OK** to delete the form.

Preview a template

1. Click **Templates** on the top menu.
2. A list of existing form templates is displayed.
3. Click **Show Inactive** to view inactive form templates.
4. Click on the name of the form template that you would like to preview.

Add a form category

1. Click **Categories** on the top menu.
2. Click **Create Category**.
3. A pop-up window appears at the center of the page.
4. Enter the desired name of the form category in the **Category Name** text box.
5. If the new category should be open to the public, check the **Public** check box followed by the **Category** text box.
6. Click **Save**.

Modify a form category

1. Click **Categories** on the top menu.
2. A list of existing form categories is displayed.
3. Click the icon that corresponds to the category that you would like to modify.
4. Enter name of the category that you wish to modify (e.g., "Technology") in **Category Name** text box.
5. Click **Save** button.

Delete a form category

1. Click **Categories** on the top menu.
2. A list of existing form categories is displayed.
3. Check the Select checkbox corresponding to the category that you wish to delete.
4. Click **Delete Selected**.
5. A deletion confirmation message appears, and clicks **OK** to delete the category.

View assigned form

1. Click **Assigned Forms** on the top menu.
2. Type the name in **Filter by** text box and click icon to search existed user.
3. There will be an icon in the column **Approver** if the user is a form approver.
4. Click icon .
5. The approver's assigned forms and approval levels will be listed in a pop-up box.
6. There will be an icon in the column **Manager** if the user is a form manager.
7. Click the icon .
8. The manager's assigned forms will be listed in a pop-up box.

Export form data

1. Click **Export** on top menu.
2. Select a form category in **From Categories** dropdown box to filter forms.
3. Select a form in **Related Forms**.

4. Click **Export** button.
5. A pop-up box appears, click **OK** to download export file.

   Note: This export will include all selected forms regardless of form status (pending, approved, etc).

Reassign Approvers

1. Click Reassign on the top menu.
2. To search for an approver, type the approver’s name or part of the name in the **Approver Name** text box and click the icon .
3. When the name of the approver is selected, a pop-up box appears.
4. Approvers can be reassigned:
   - Temporarily by having the radio button on **Reassign temporarily to** selected and putting the start date and end date. This is useful for vacations, leaves, etc. The reassignment will start and end within the selected dates.

     Note: the start date and end date are not included in the effective timeframe.
   - Permanently by having the radio button on **Reassign permanently to** selected. This needs to be done for approvers before they can be deleted from the system.
5. Use the dropdown list of approvers by clicking the box stating **Select Approver**.
6. Click on the name of the approver that will be assigned.
7. Click the **Save** button.

   Note: Gray Save button means current selected approver has been assigned to cover others.

Viewing Forms Usage Statistics Report

1. Click **Usage** on the top menu.
2. Select categories which are included in the report in **Available Categories**.
3. Select forms which are included in the report in **Available Forms**.
4. Select started date and end date which form submitted in this time range.
5. Click **Submit** button.

Advanced search

1. Click **Search** on the top menu navigate to **Search** page.

   Note: If you not disable cookie in browser, in default the page shows result under the search criteria you set last time.
2. Click the **Show Search Criteria** link on the top right hand side of the page.
3. Search criteria box appears below the **Show Search Criteria** link.
4. Set search criteria and then click the **Search** link in the bottom of search criteria box to begin search.

Create a new report

1. Click **Reporting** on the top menu.
2. Click the **Create New Report** button, navigate to **Select Form** wizard.
3. 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.
4. 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.

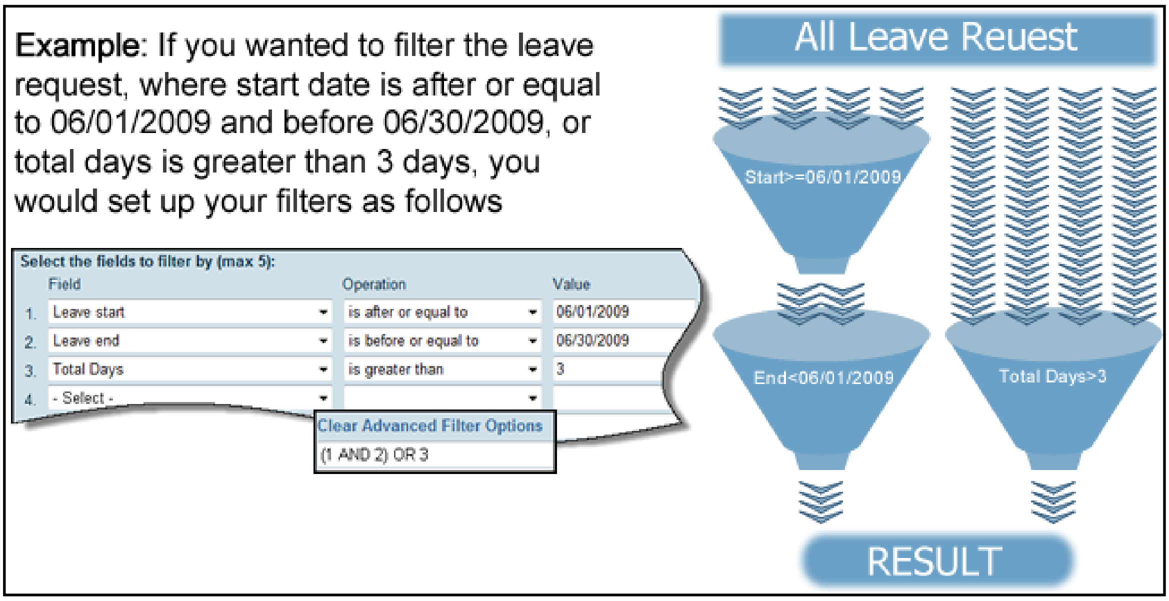
     Note: If you don’t choose tiem range, the system will include all forms.
   - Click the **Next>>** button to navigate to the Select Fields wizard.
5. For the **Select Fields** wizard:
   - Select fields to print on in the **Select the fields to print on the report (max 50)** list box.

     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.
   - 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.
   - 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 field, you can only select a maximum of 5 fields.
   - Set advanced filter options.



6. For **View Report** wizard:
    - Report result appears in the page.

Report on: 06/08/2010 23:34:09

Budget request of 2011 financial year (Principal only) Form Report

(Submitter Name)	Approval Date	Budget($)	Form ID	Requested items	Submission Date
Pamela Barber		2132	FOR20100603000004		6/3/2010 4:42:01 AM
Daniel Achs		1500	FOR20100603000007		6/3/2010 5:41:30 AM

Export report

1. Click the Export ▼ button in the **View Report** wizard.

   Note: See the section “Create a new report” for more details about the **View Report** wizard.

2. Select a desired file format and wait for download.

   - PDF
   - CSV
   - EXCEL

Save a report

1. Click the Save Report in the **View Report** wizard.

   Note: See the section “Create a new report” for more details about the **View Report** wizard.

2. The **Save Report** pop-up window appears, input desired report name in the **Report Name** text box.
3. Click the **Submit** button.

Take snapshot

1. Click the **Take snapshot** button in the **View Report** wizard.

   Note: See the section “Create a new report” for more details about the **View Report** wizard. You can only take snapshot for a saved report.

2. The **Take snapshot** pop-up window appears, input desired snapshot name in the **Snapshot Name** text box.
3. Click the **Submit** button.

Send report by E-mail

1. Click the **Send by E-mail** button in the **View Report** wizard.

   Note: See the section “Create a new report” for more details about the **View Report** wizard.

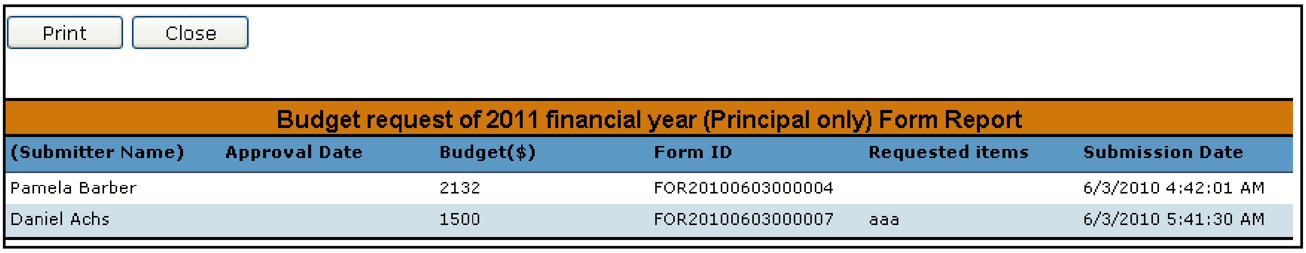
2. Input recipient’s E-mail address in the **To** text box.
3. Input E-mail subject in the **Subject** text box.
4. Choose desired file format in the **Report File Format** radio button box.
5. Input content in the **Content** text box.
6. Click the button  on the top left hand side of the page to send this E-mail.

Print report

1. Click the **Print** button in the **View Report** wizard.

   Note: See the section “Create a new report” for more details about the **View Report** wizard.

2. A new page appears, and clicks the **Print** button.



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Daniel Achs		1500	FOR20100603000007	aaa	6/3/2010 5:41:30 AM

Search report

1. Click **Reporting** on the top menu.
2. Type the report’s name in the **Report Name** text box and click the **Search** button.

View an existed report

1. Click **Reporting** on the top menu.
2. A list of existing report is displayed.

3. Click on the name of the report that you would like to view.

Edit a report

1. Click **Reporting** on the top menu.
2. A list of existing report is displayed.
3. Click the **Edit** link that corresponds to the report that you would like to edit.

Delete a report

1. Click **Reporting** on the top menu.
2. A list of existing report is displayed.
3. Click the **Delete** link that corresponds to the report that you would like to edit.
4. A deletion confirmation message appears, and clicks **OK** to delete the report.

Copy a report

1. Click **Reporting** on the top menu.
2. A list of existing report is displayed.
3. Click the **Copy** link that corresponds to the report that you would like to edit.
4. The **Copy Report** pop-up window appears, input the new report name in the **Report Name** text box.
5. Click the **Submit** button.

Rename a report

1. Click **Reporting** on the top menu.
2. A list of existing report is displayed.
3. Click the **Rename** link that corresponds to the report that you would like to edit.
4. The **Rename Report** pop-up window appears, input the new report name in the **Report Name** text box.
5. Click the **Submit** button.

View an existed snapshot

1. Click **Reporting** on the top menu.
2. A list of existing report is displayed.
3. Click the **[Show snapshot]** next to a report.

   Note: [Show snapshot] will not appears if the report never takes snapshot.
4. A list of snapshot appears below the report.
5. Click on the name of the snapshot that you would like to view.

6. Navigate to view snapshot page.

Export a snapshot

1. Navigate to view snapshot page.

   Note: See the section "View an existed snapshot" for how to navigate to view snapshot page.

2. Click the  button.

3. Select a desired file format and wait a few seconds for automatic download.

Send snapshot by E-mail

1. Navigate to view snapshot page.

   Note: See the section "View an existed snapshot" for how to navigate to view snapshot page.

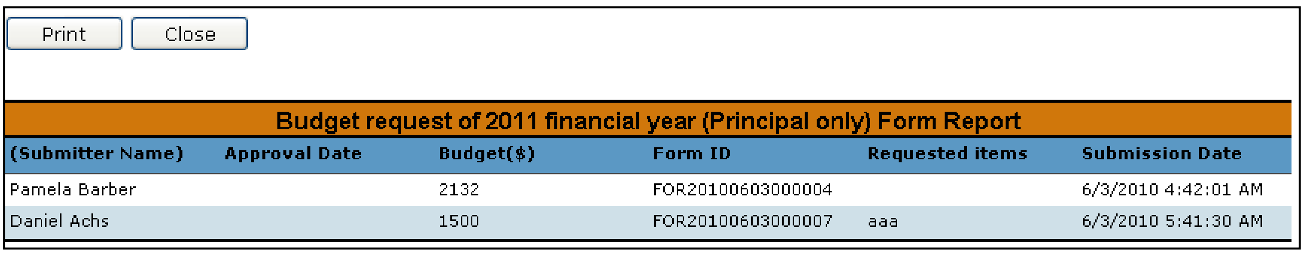
2. Click the **Send by E-mail** button.
3. Input recipient's E-mail address in the **To** text box.
4. Input E-mail subject in the **Subject** text box.
5. Choose desired file format in the **Report File Format** radio button box.
6. Input E-mail body in the **Content** text box.
7. Click the button  on the top left hand side of the page to send this E-mail.

Print snapshot

1. Navigate to view snapshot page.

   Note: See the section "View an existed snapshot" for how to navigate to view snapshot page.

2. Click the **Print** button.
3. A new page appears, and then clicks the **Print** button.



Budget request of 2011 financial year (Principal only) Form Report

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Daniel Achs		1500	FOR20100603000007	aaa	6/3/2010 5:41:30 AM

Delete an existed snapshot

1. Click **Reporting** on the top menu.
2. A list of existing report is displayed.
3. Click the **[Show snapshot]** next to a report.

   Note: [Show snapshot] will not appears if the report never takes snapshot.
4. A list of snapshot appears below the report.
5. Click on the **Delete** link that corresponds to the snapshot that you would like to rename.
6. A deletion confirmation message appears, and clicks **OK** to delete the snapshot.

Rename an existed snapshot

1. Click **Reporting** on the top menu.
2. A list of existing report is displayed.
3. Click the **[Show snapshot]** next to a report.

   Note: [Show snapshot] will not appears if the report never takes snapshot.
4. A list of snapshot appears below the report.
5. Click on the **Rename** link that corresponds to the snapshot that you would like to rename.
6. The **Rename Snapshot** pop-up window appears, input snapshot name in the **Snapshot Name** text box.
7. Click the **Submit** button.

Configuration

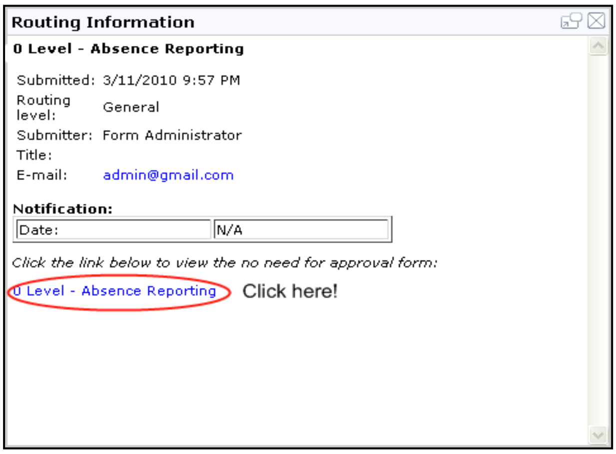
1. Click **Forms** on top menu.
2. Clicking **System E-mail Address** will allow the selection of an e-mail address that will be the default address for any system e-mails sent.
3. Clicking **Configure Print Form Message** will allow the selection of Yes or No which will turn on or off the default message seen once a form is submitted which asks the user if they want to print the form.
4. Clicking **Deletion Permission for Forms Manager** will allow the selection of Yes or No which will turn on or off the ability that the manager deletes a form.
5. Clicking **Default Public E-mail Address** will allow the selection of an e-mail address that will be the default submitter's email address for public form if the form doesn't request the submitter's name and e-mail address.
6. Click **Forms Header** will configure formatting of form instructions, district logo, and Form information, applied to all forms.
7. Click **Form Approval Notification** will allow select one email subject style from three build-in styles.

Manager

View managed forms

1. Click **Manage Forms** on the top menu.
2. Show all of the forms that have been assigned to you to manage.
3. Click the **Show search criteria** on the top right hand side of page to search forms.
4. You can view the form routing information by click on the form name.

5. Click on the form name in the pop-up window, a new page appears which allows the viewing of the form.



6. Managed forms are not necessarily forms that need to be approved by the manager, but you can delete form, export form data, print managed form list.

Viewing Forms Usage Statistics Report

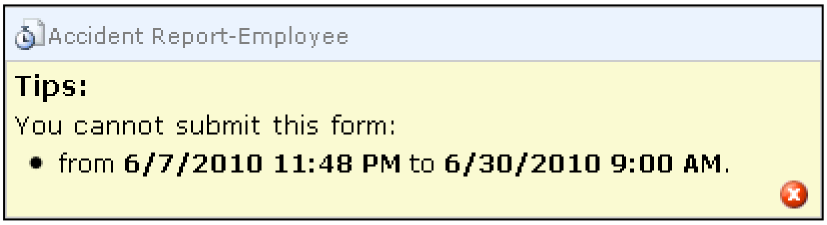
1. Click **Usage** on the top menu.
2. Show a usage statistics of all of the forms that have been assigned to you to manage.

Submitter

Submit a form

1. Click the name of a form that you would like to submit.

   Note: Icon and grey text represent that you can not access this form at this time.

   Tip: To quickly find a form such as 2010 Leave Request Form, type leave in the **Search** box, and then click **Go** button or press ENTER.

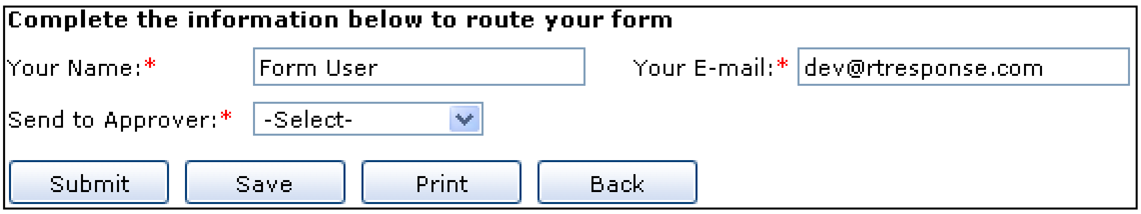
   

2. Fill out the form.
3. Type your name in the **Your Name** box.
4. Type your e-mail address in the **Your E-mail** box.
5. Select the approver that you would like to route the form to from the **Send to Approver** list.

   Note: If you can not see the **Send to Approver** list, it indicates that this form is a Zero-Level form which do not require approval.

6. Click **Submit**.

   Tip: A form can be filled out in part, saved and completed later. The following screen shows the **Save** button located on each form. The saved form will have a status of **Saved**. The system also allows you to delete it if desired.

7. You can go on to do one of the following after submission:
   - **View my forms**.
   - **Submit another form**.

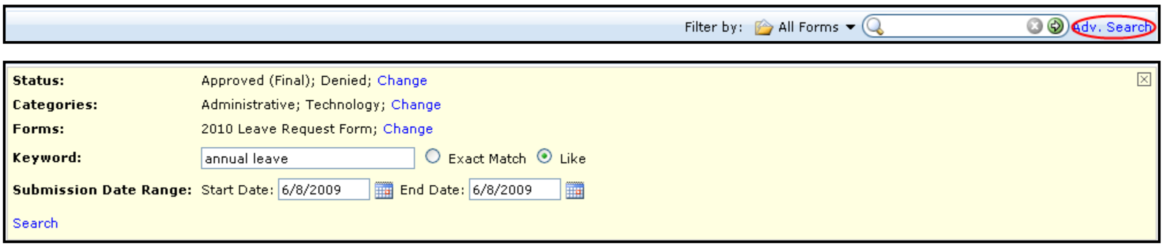
View my forms

1. Click the name of a form that you would like to view, and then you can see the form's routing information show up in the pop-up window.

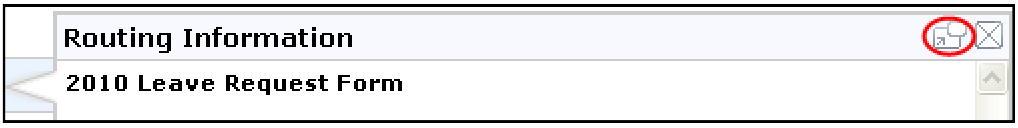
Tip:

- To quickly find a form such as 2010 Leave Request Form, type leave in the **Search** box, and then click **Go** button or press ENTER.

- An advanced search engine is also provided, which offers numerous options for making your searches more precise and getting more useful results. And the searches can be saved in your computer if you have not disabled cookies in your browser.



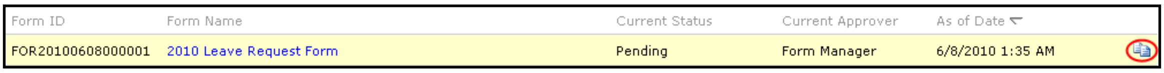
- Click **Open in new window** button to open the pop-up in a new window.



2. Click the form link *(2010 Leave Request Form in this scenario)* in the pop-up window, to view the form content in a new window.

Copy a form

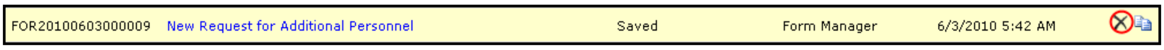
1. Click the **Copy** button.



2. Make necessary modifications on the copied form, and then **Submit** or **Save** it.

Delete a saved form

1. Click the **Delete** button.



2. System will confirm your request first, and then delete the form.

Resubmit a denied form

1. If a form can be resubmitted, there will be a link called **Resubmit**.

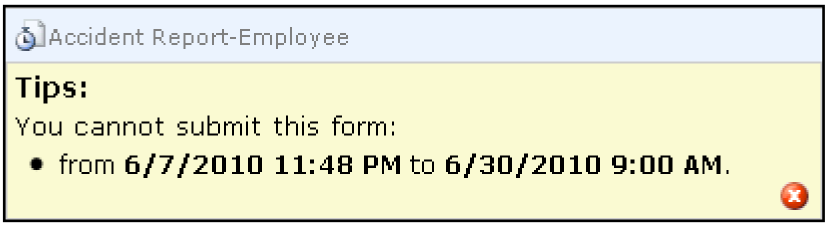
2. Click the link to resubmit this form.

Approver

Approve a form

1. Click the name of a form that you would like to approve.

   Note: Icon and grey text represent that you can not access this form at this time.



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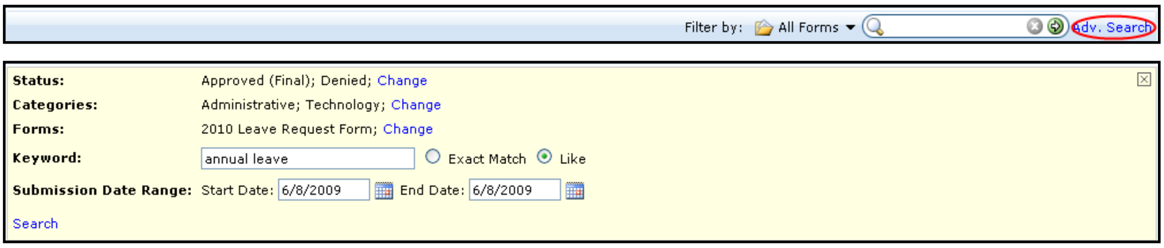
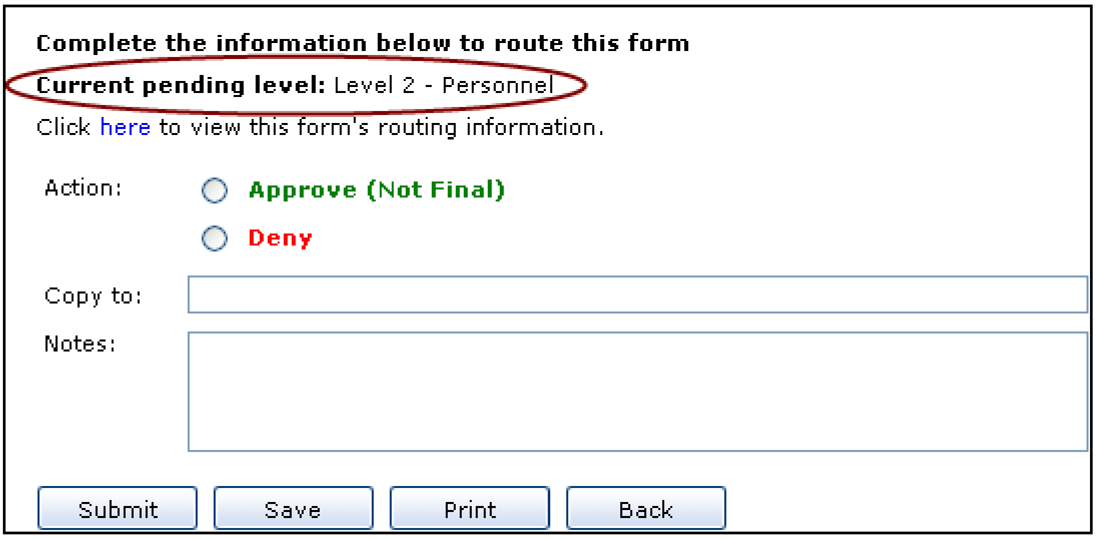
- An advanced search engine is also provided, which offers numerous options for making your searches more precise and getting more useful results. And the searches can be saved in your computer if you have not disabled cookies in your browser.

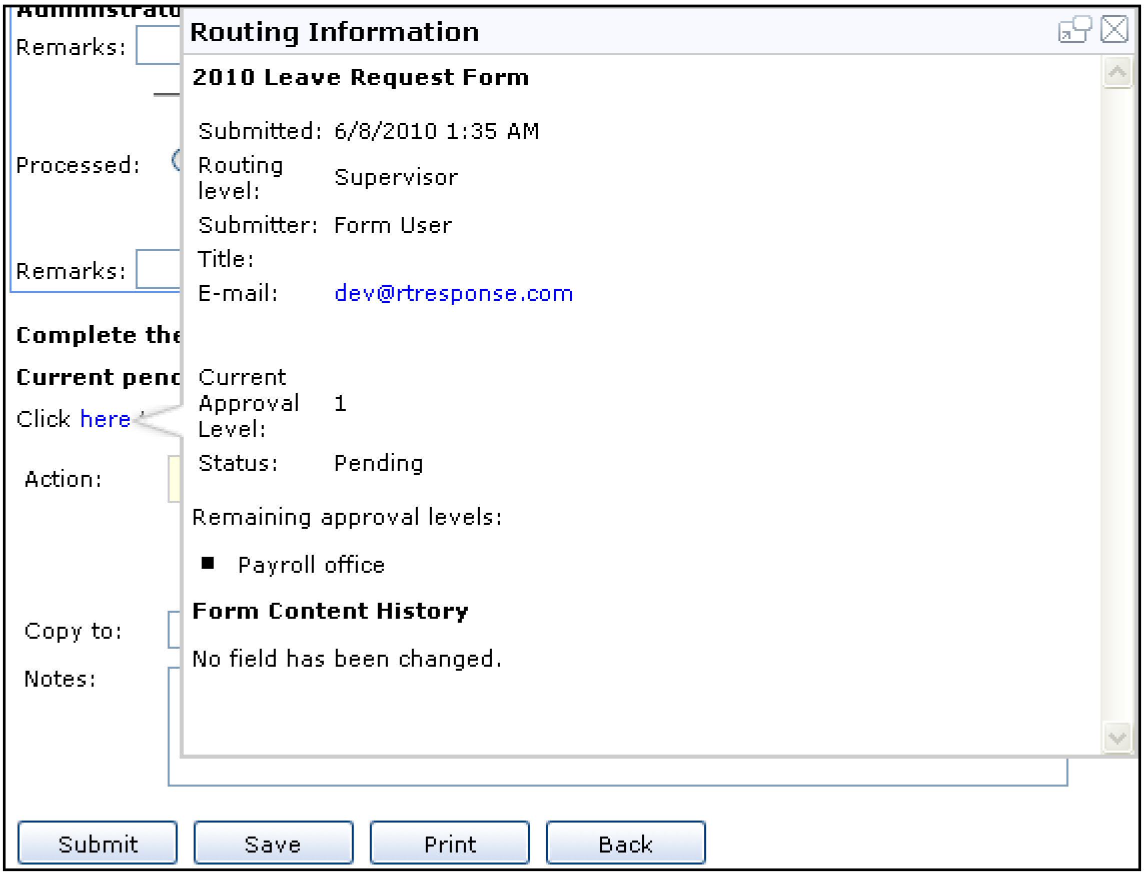


2. You can make necessary modifications on the form that is set to **Allow Form Approver to Update the Form Content during Approval Process**.

3. At the bottom of the form, locate the routing section that applies to your routing level.



Tip: You can see the form routing information by clicking **here**.



4. Select the **Approve** option if you wish approve the form, and then do one of the following if applicable:
    a. Select **Final Approval** option.
    b. Select the approver that you would like to route the form to from the **Forward to** list.

5. Select the **Deny** option if you wish deny the form. If this form is set to **Allow Form Submitters to Resubmit the Form**, you can select **Allow Resubmit** option as you wish.

6. If necessary, in the **Copy to** box, type the e-mail addresses of the additional personnel that you would like to forward the form to, each separated by a semicolon.

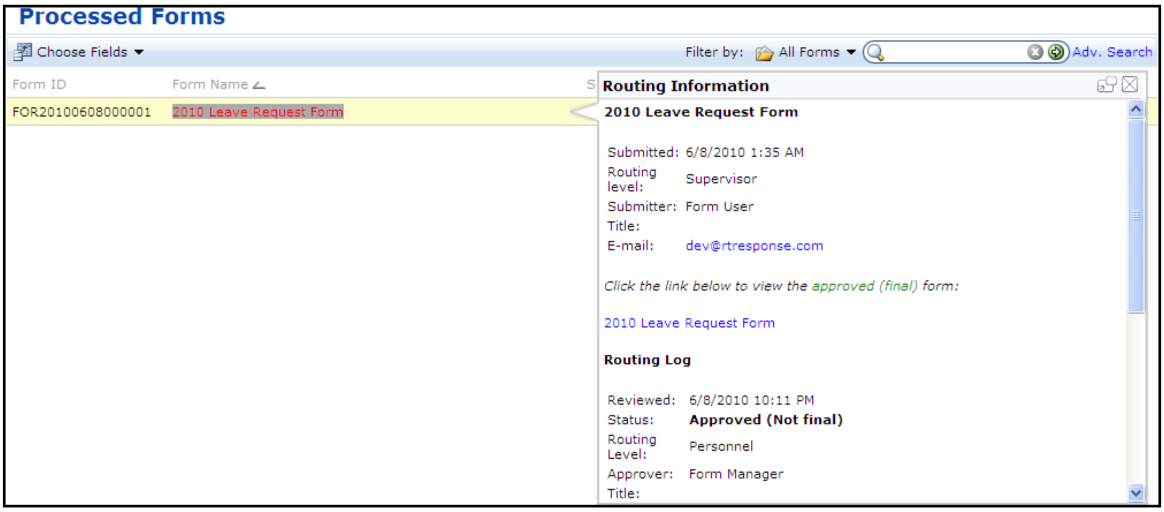
7. If necessary, enter some notes about the form in the **Notes** box.

8. Click **Submit** to route the form.

9. You can go on to do one of the following after submission:
    - **View processed forms**.
    - **Submit pending forms**.

View processed forms

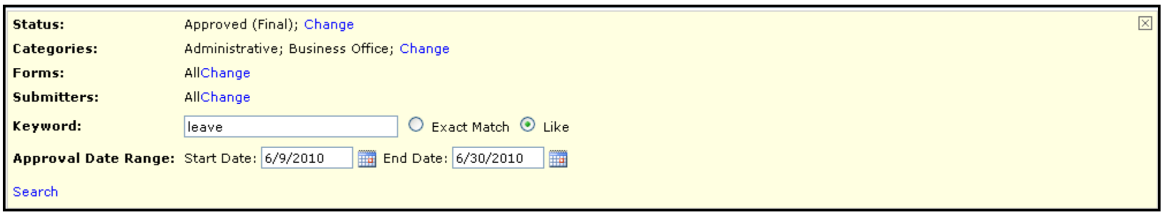
1. Click the name of a form that you would like to view, and then you can see the form's routing information show up in the pop-up window.



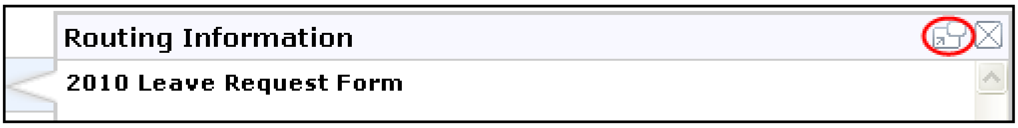
Tip:

- To quickly find a form such as 2010 Leave Request Form, type leave in the **Search** box, and then click **Go** button or press ENTER.

- An advanced search engine is also provided, which offers numerous options for making your searches more precise and getting more useful results. And the searches can be saved in your computer if you have not disabled cookies in your browser.



- Click **Open in new window** button to open the pop-up in a new window.



Note: Only the **Approved (Final)** and the **Denied** forms show up under the **Processed Forms** tab.

2. Click the form link *(2010 Leave Request Form in this scenario)* in the pop-up window, and then you can view the form content in a new window.