All About Forms

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What are we reviewing in this webinar?

1

Basics of the form processes and their structure.

Form Basics

2

The parts of the form process to customize further.

Steps & Fields

3

How to show or hide steps based on certain criteria.

Restrictions

4

How to show or hide fields based on conditions set.

Conditional Logic

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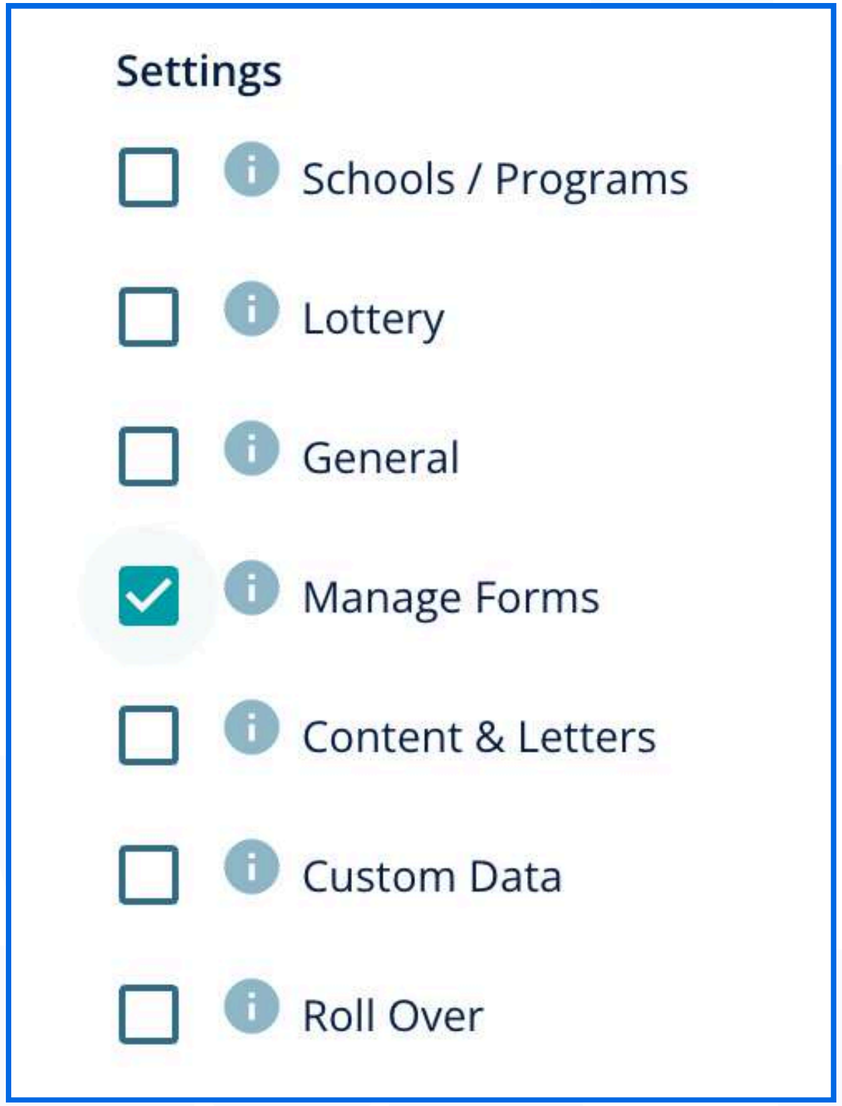
This webinar is for Admins with Manage Forms access

- In order for a user to make changes to their form processes, they must be part of a user group that has the "Manage Formsr" permission enabled.
- By default, all Super Admin user groups will have this setting enabled



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Forms are one of the **most crucial parts** of the Enroll system. They are the driving force behind the **student placement process** and are the feature that **guardians directly interact with the most**.

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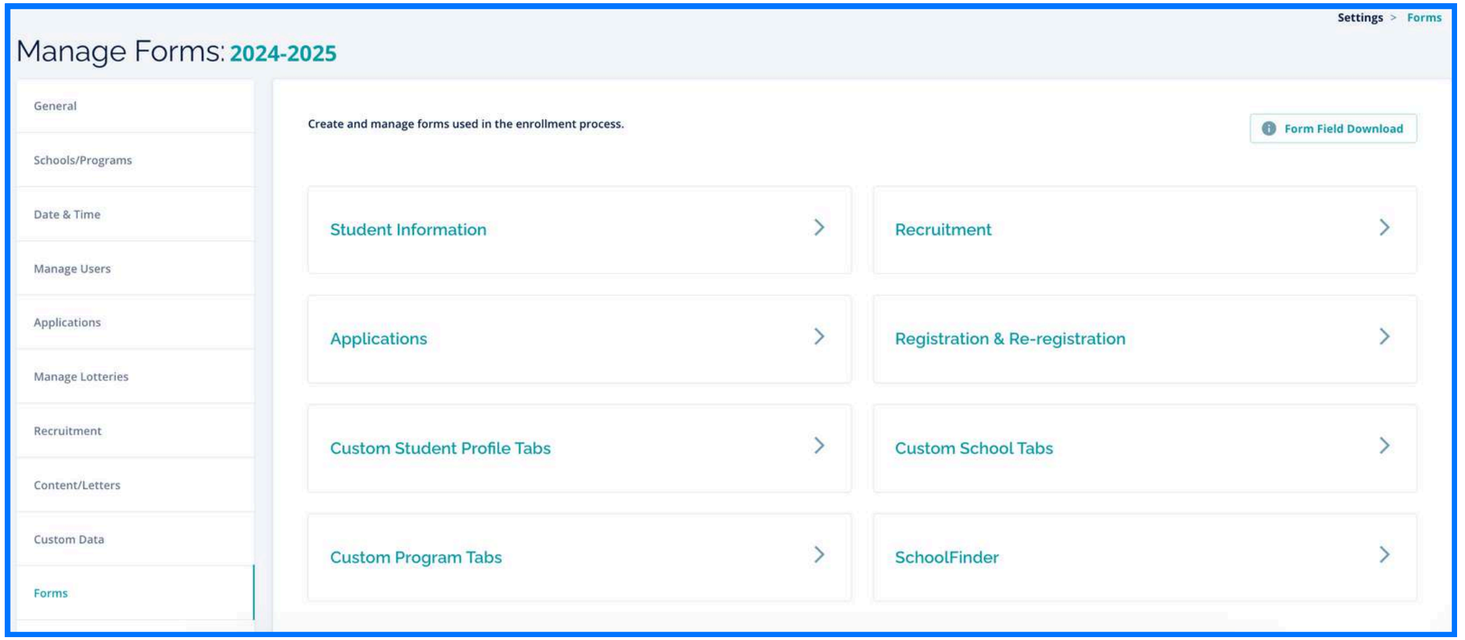
Let’s Navigate to our Forms



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Form Process Structure

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Types of Forms

Used to create or update a student account

Student Information

Used to apply for lottery and can allow multi-choice

Applications

Used to enroll in school and can allow export to SIS

Registrations & Re-Registrations

Can be used for additional processes needed

Custom

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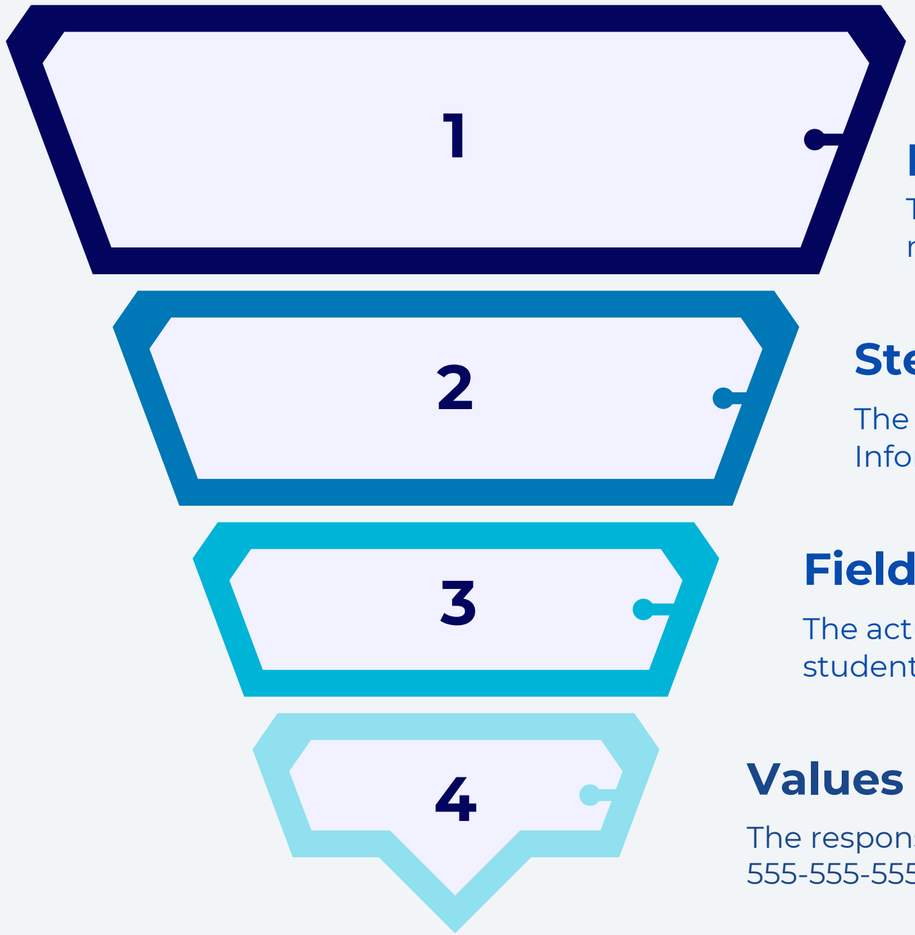
How are Forms **Structured?**



Form Type

The process that a guardian will be going through - ie the application, registration, appeals, etc.

Steps

The individual sections within the form - ie Student Information, Guardian Information, Siblings, etc.

Fields

The actual questions or items being gathered within the step - ie the student's name, guardian contact information, etc.

Values

The responses the guardians are providing in each field - ie Tom, 555-555-5555, yes/no, etc.

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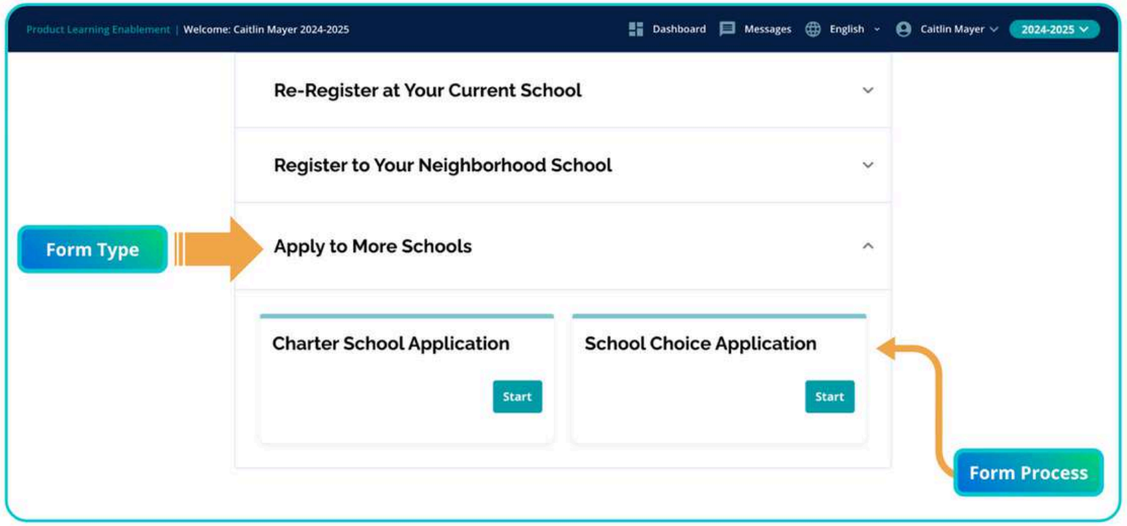
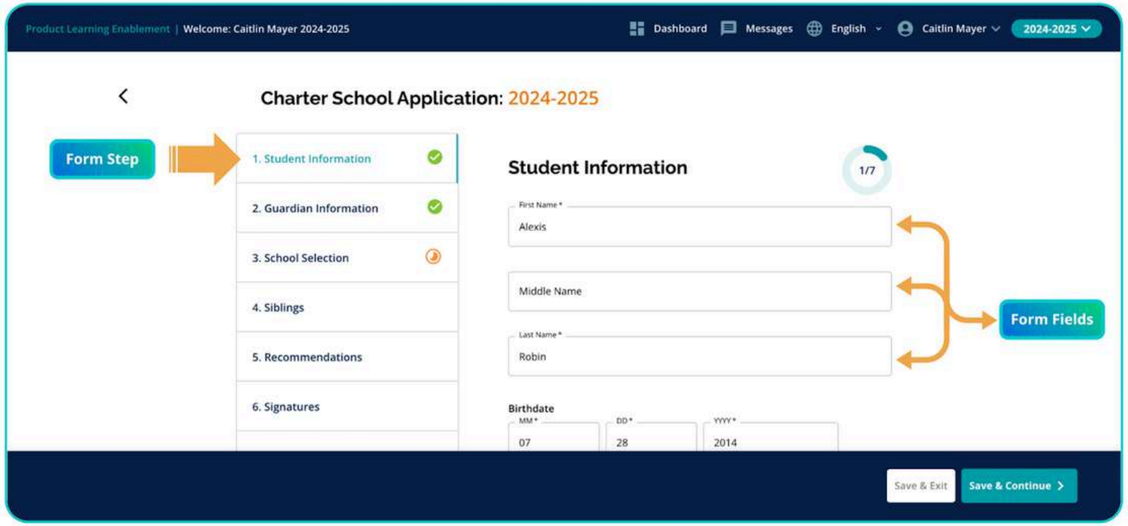
Parts of the Form





Create a Form

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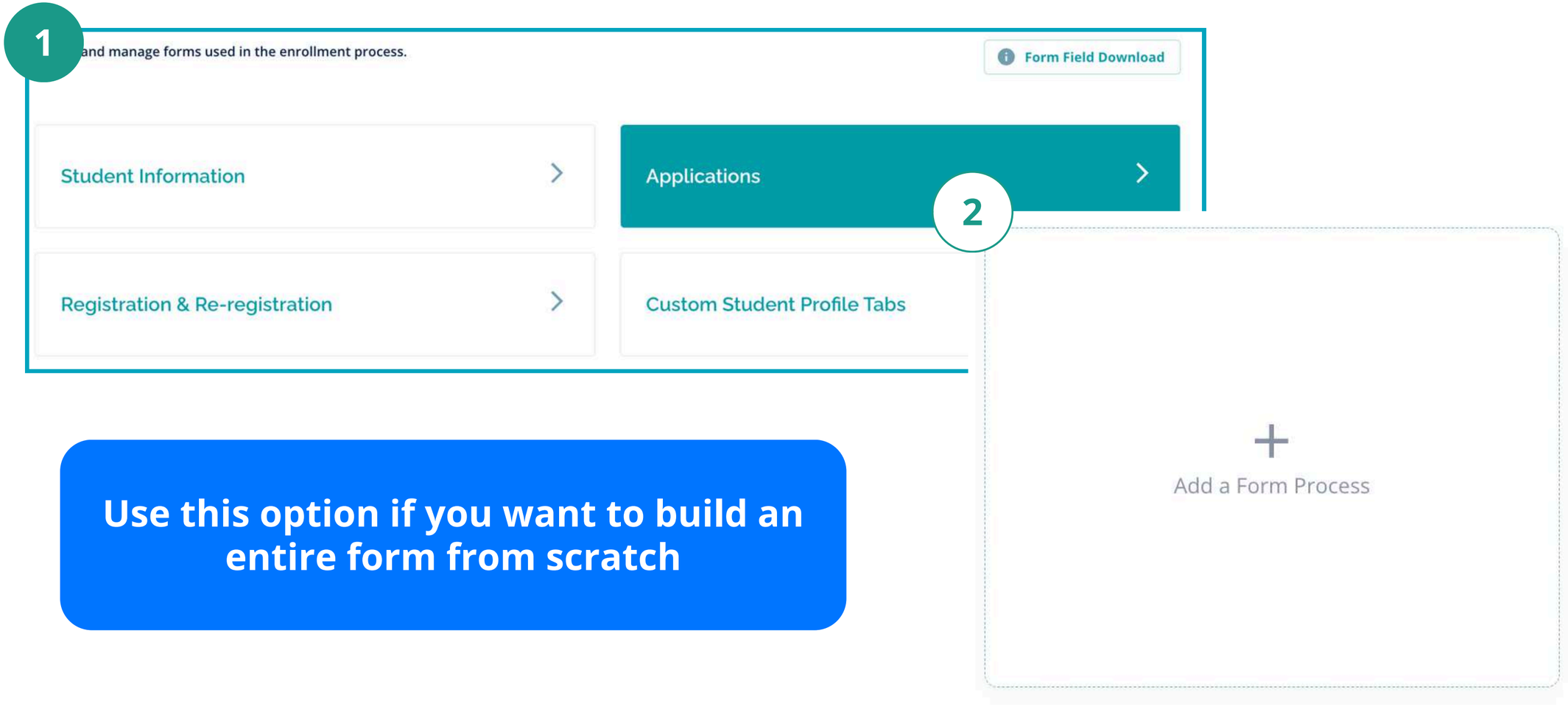
Creating a New Form



Use this option if you want to build an entire form from scratch

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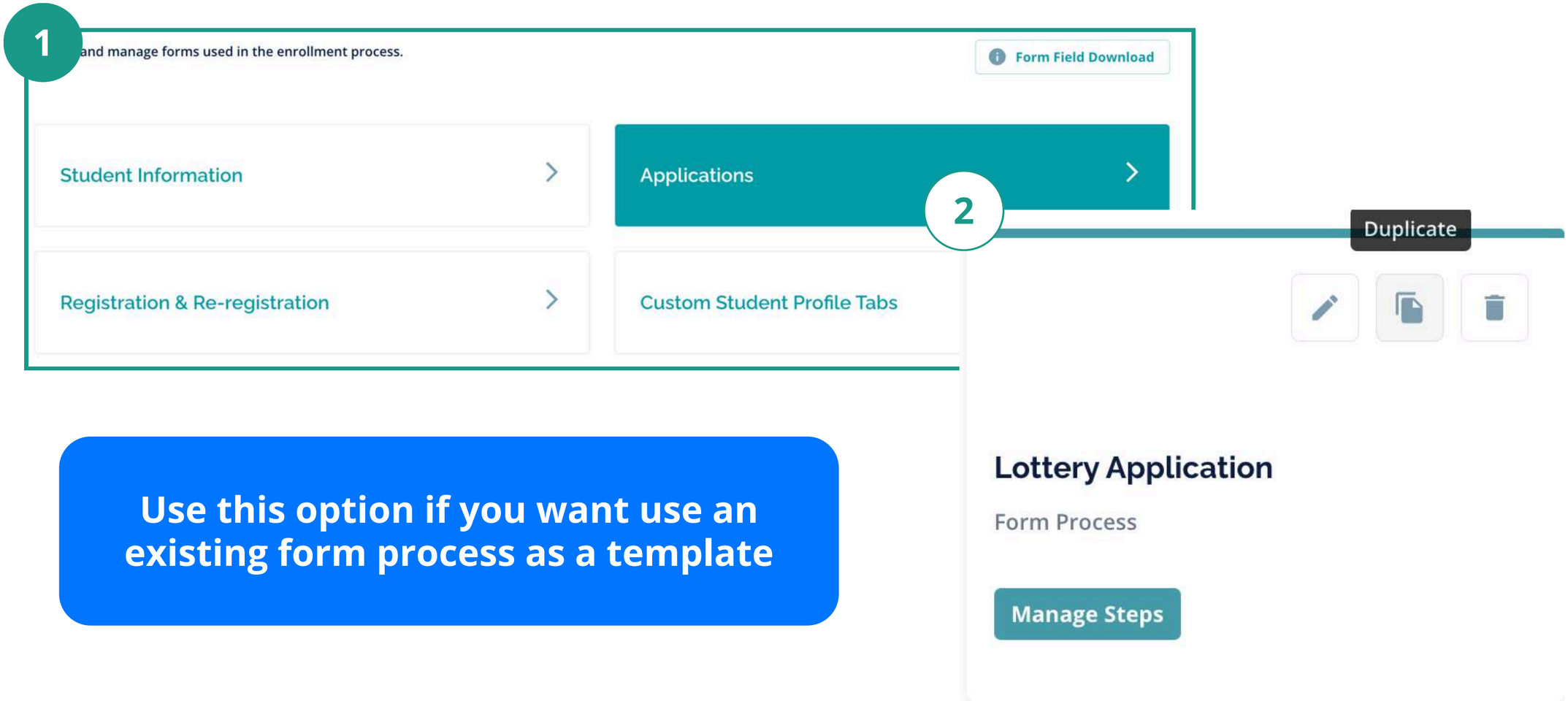
Duplicate an Existing Form



Use this option if you want use an existing form process as a template

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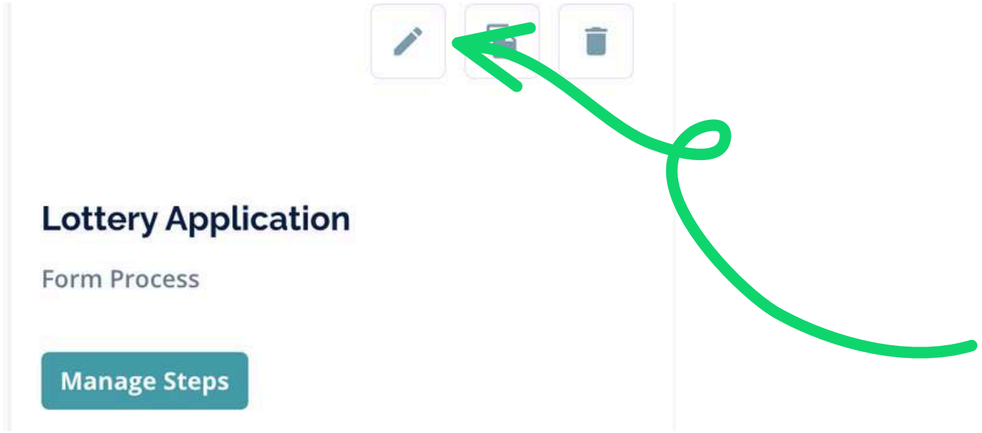
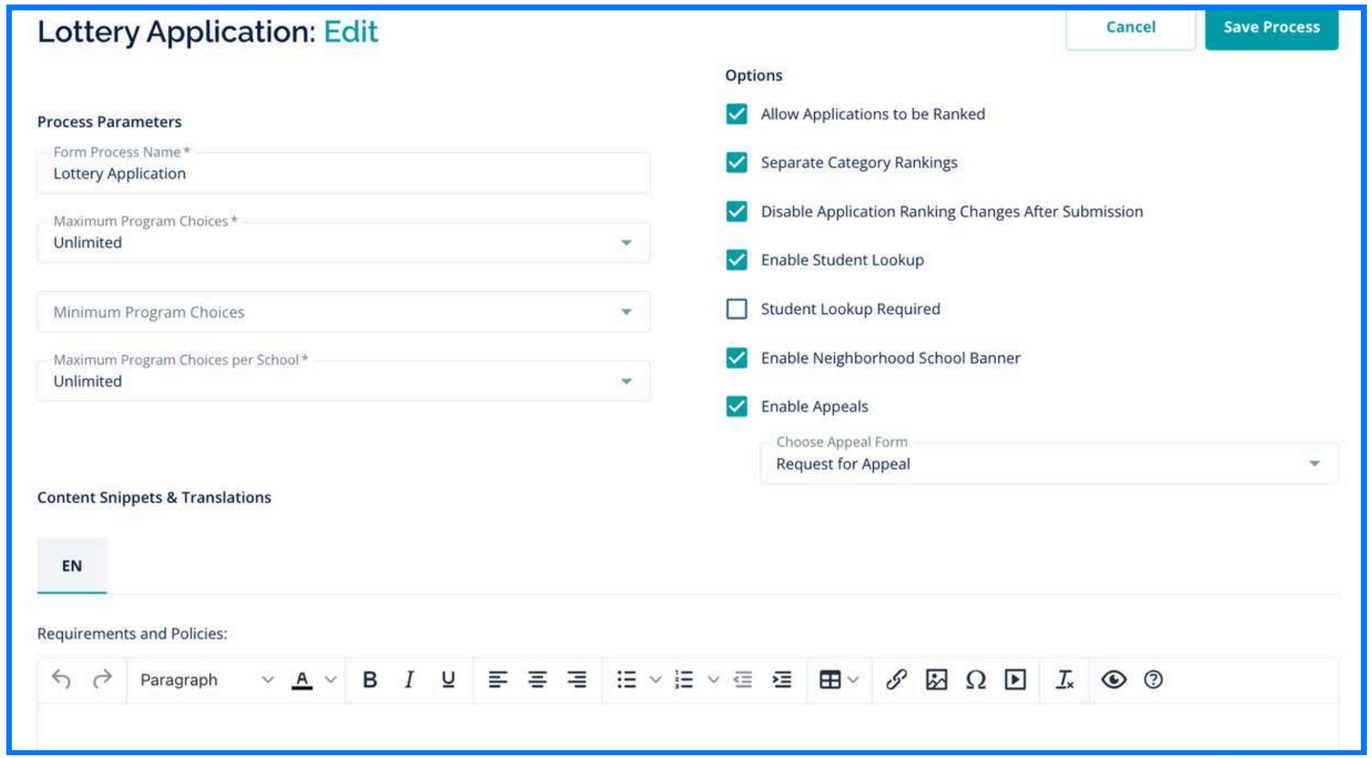
Form Settings: Applications





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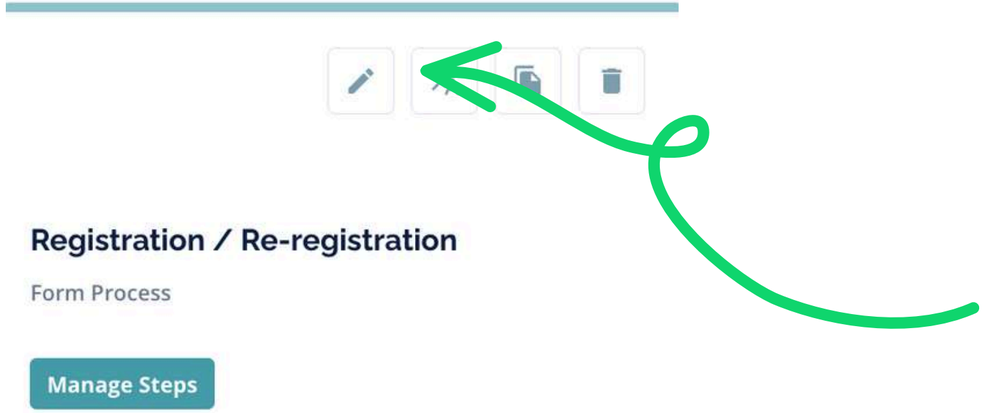
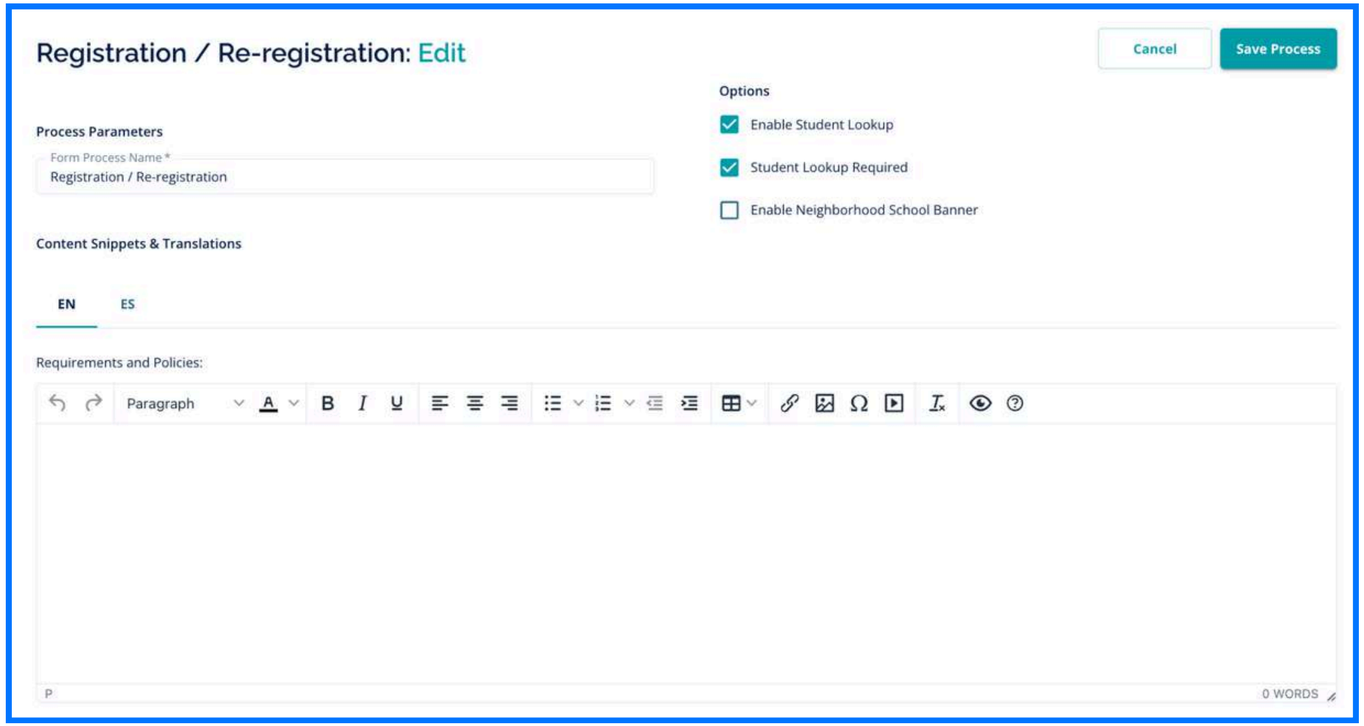
Form Settings: Registrations





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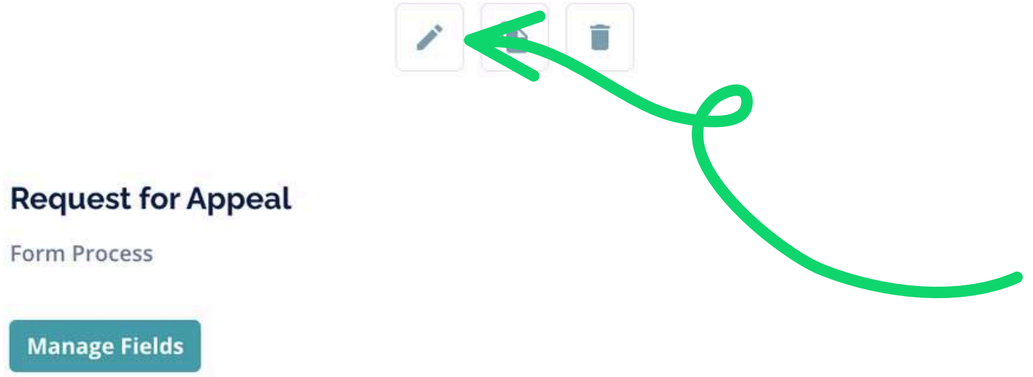
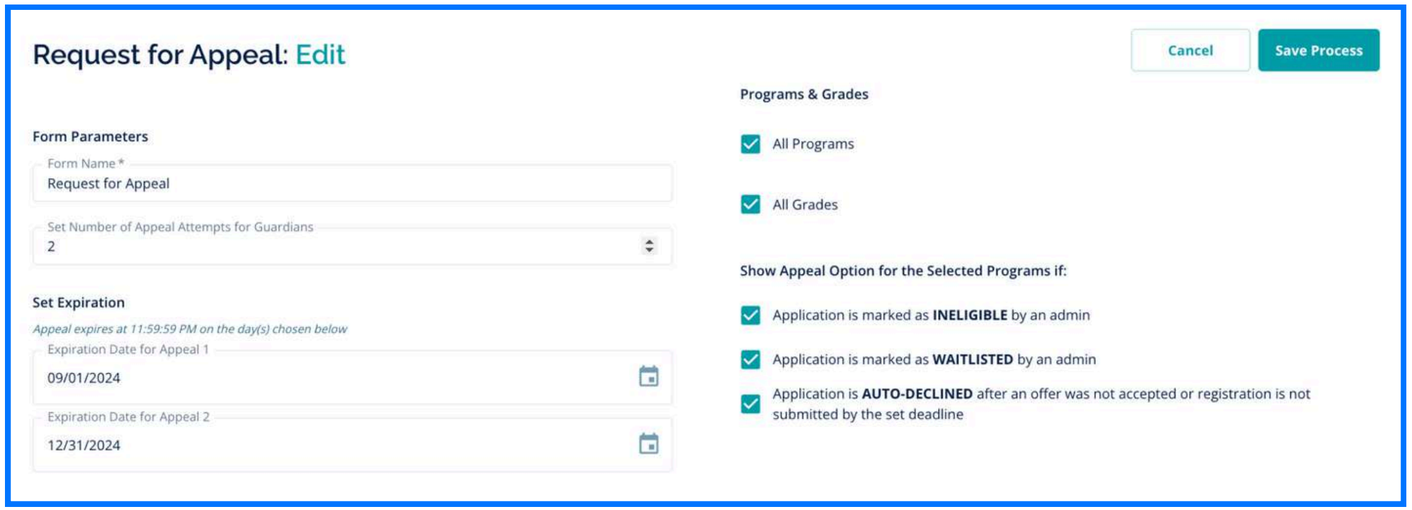
Form Settings: Appeals





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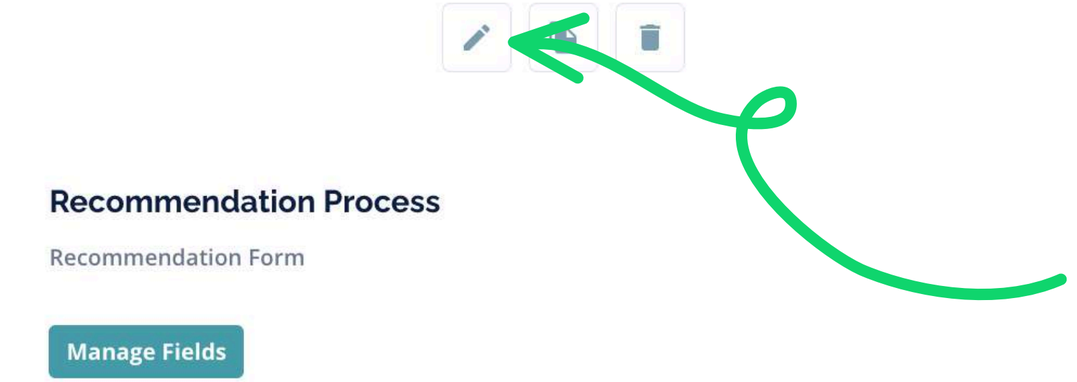
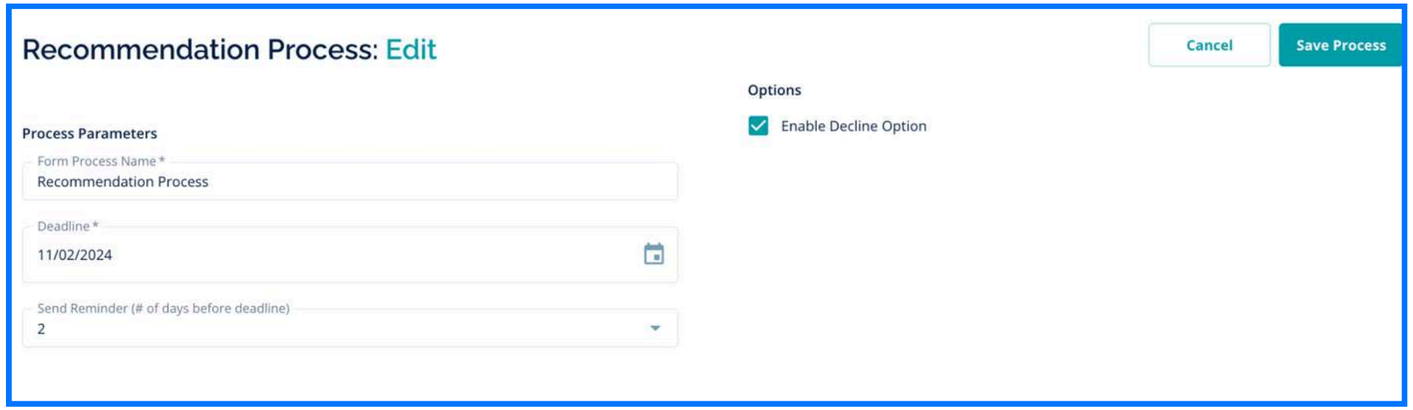
Form Settings: Recommendations





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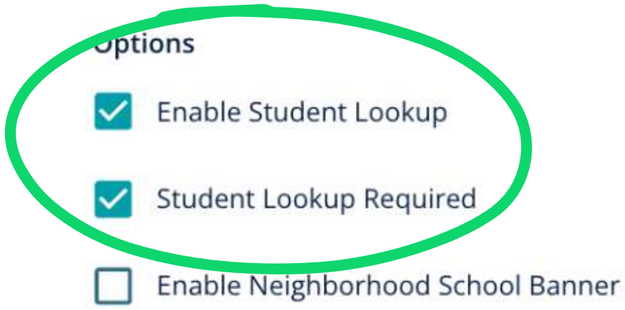
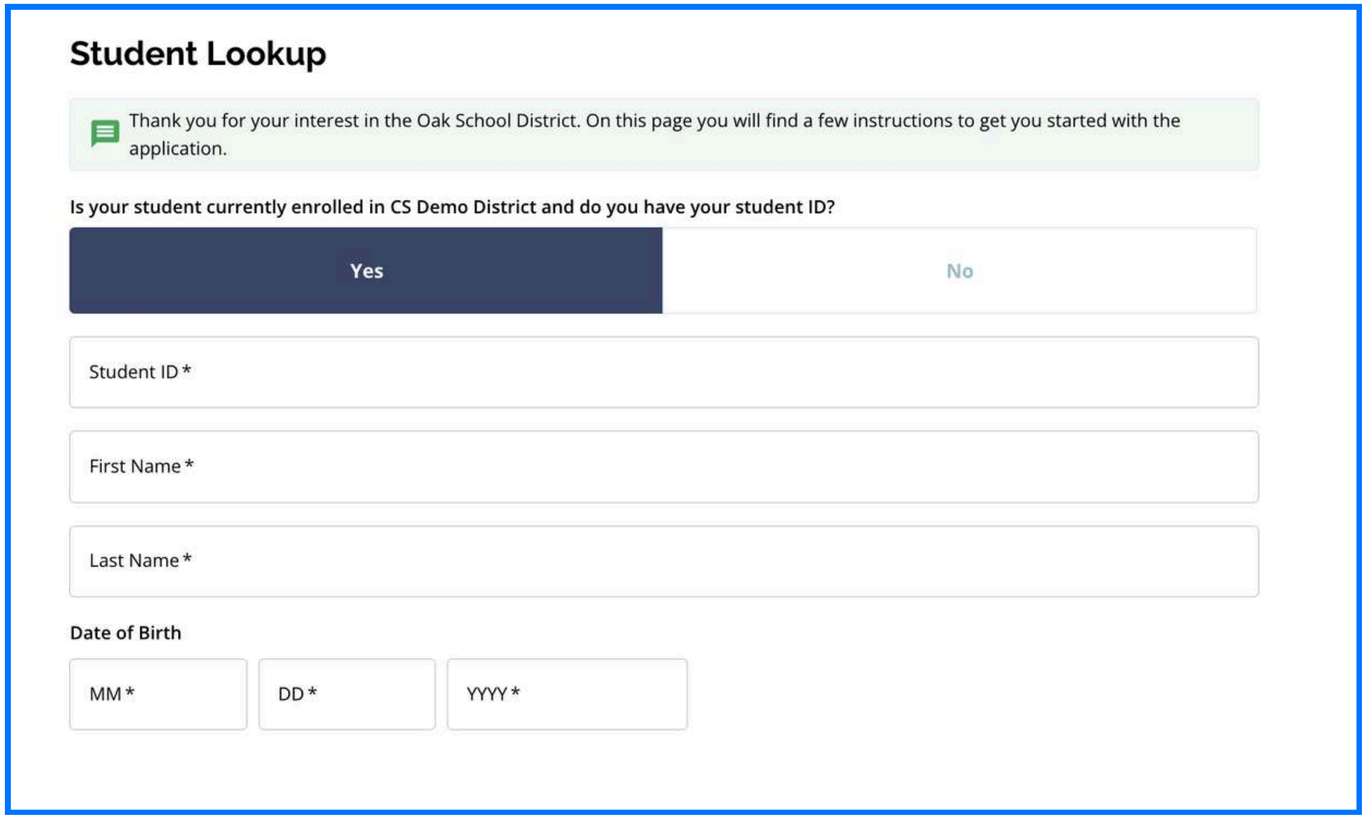
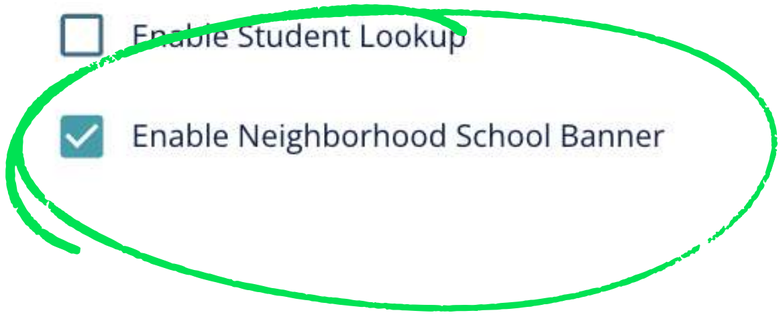
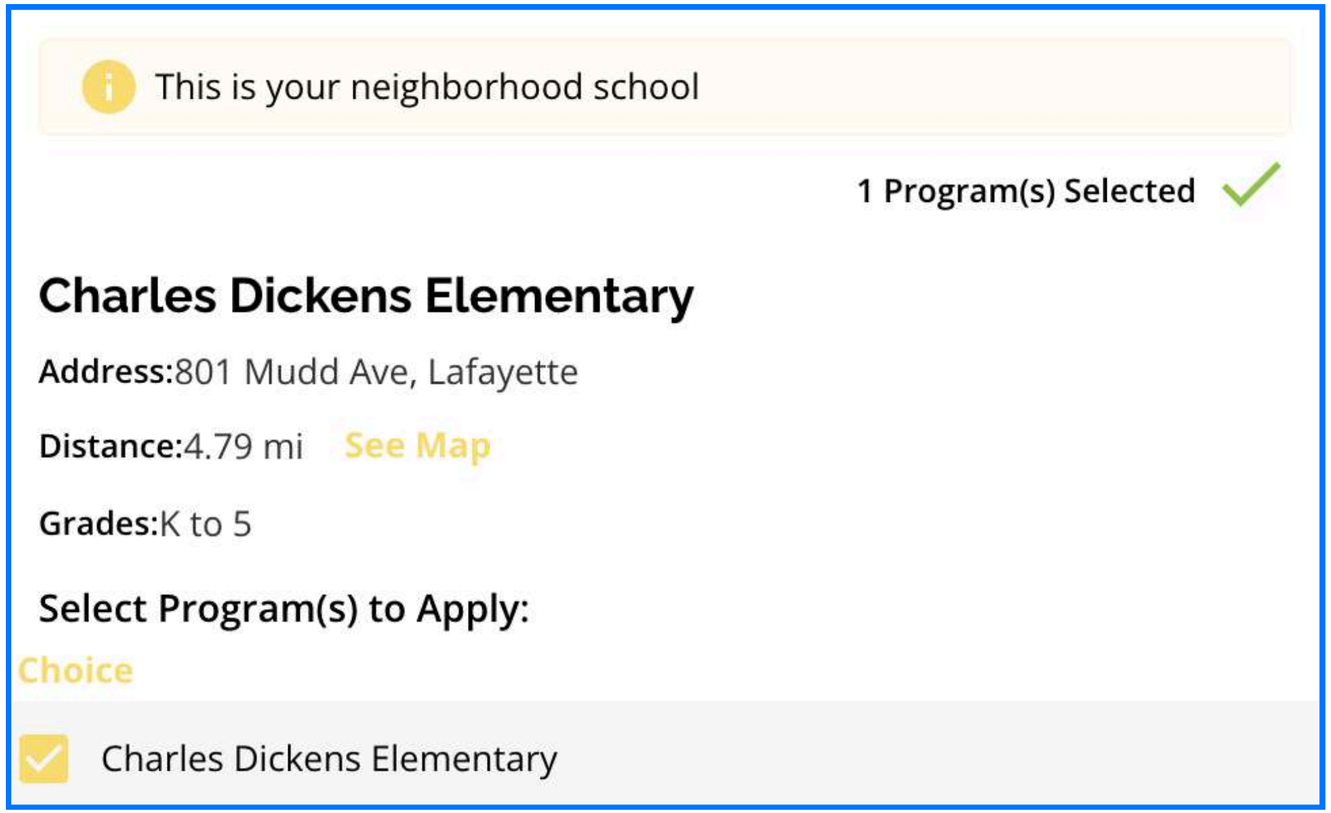
Student Lookup



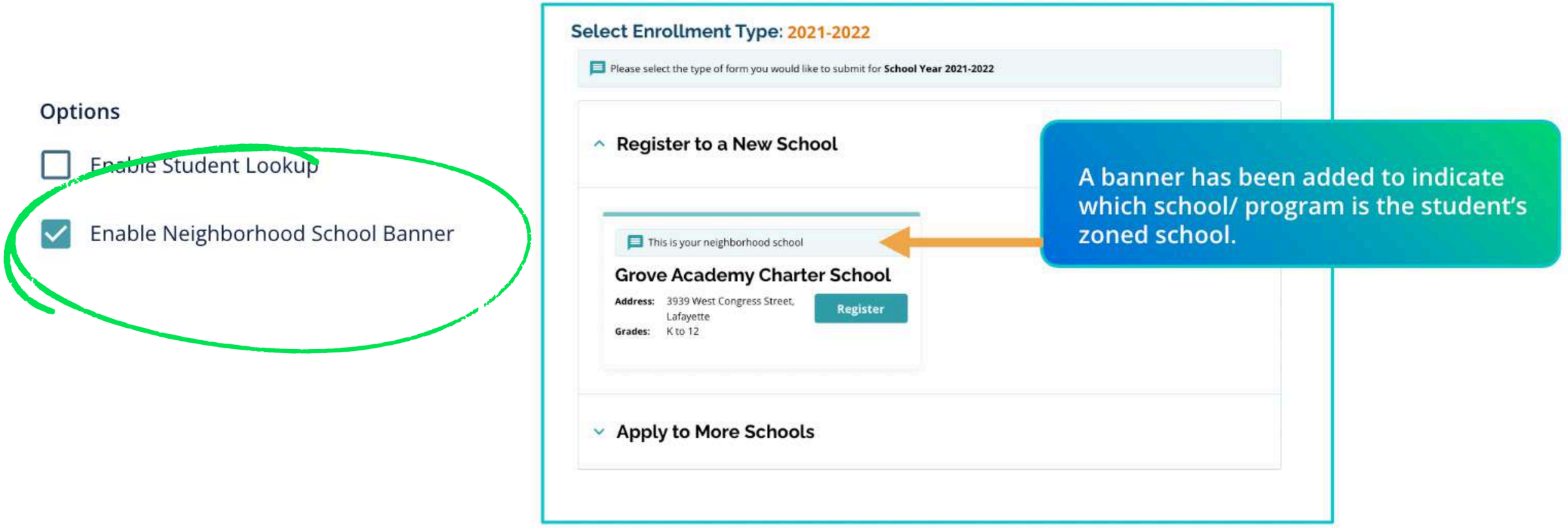


Neighborhood Banner





Neighborhood Banner



Form Steps

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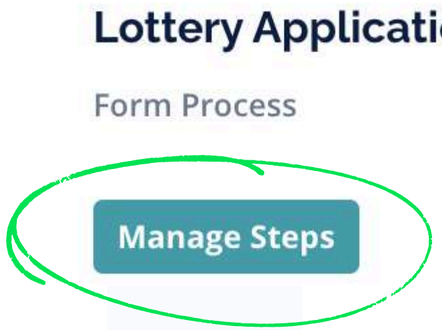
Each of the Steps have their own settings which can be edited by clicking the pencil icon

- Reorganize Steps
- Duplicate Steps
- Add New Steps
- Delete Existing Steps



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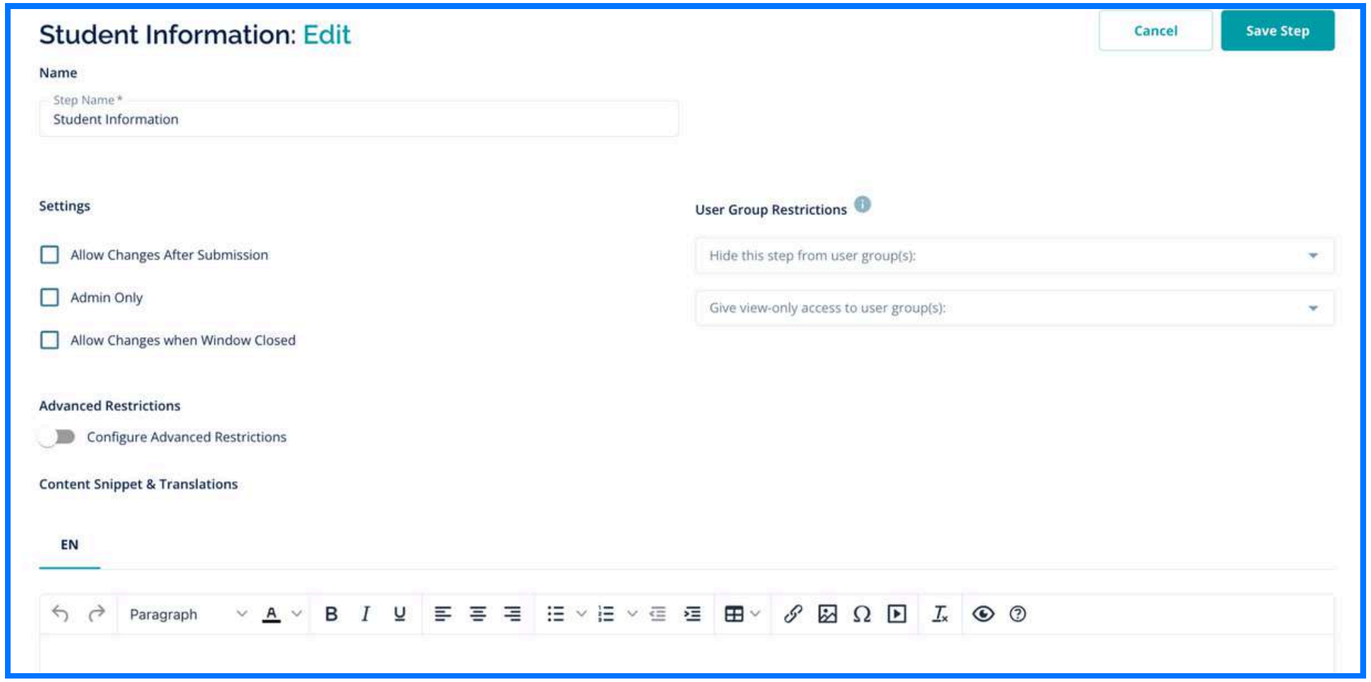
Step Settings



Registration Steps Only

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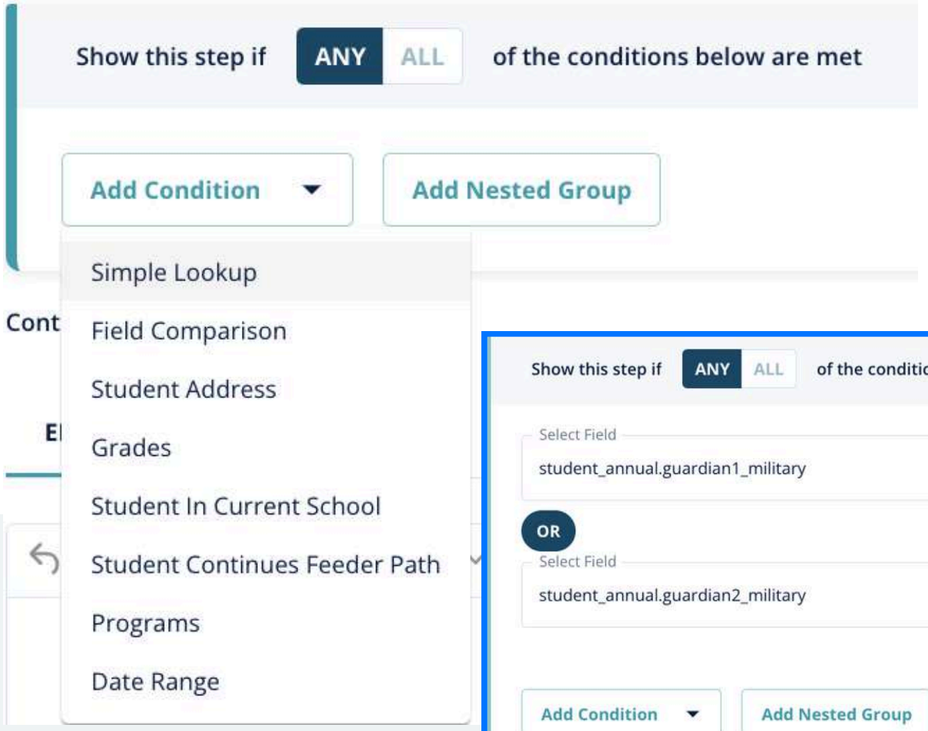
Advanced Restrictions



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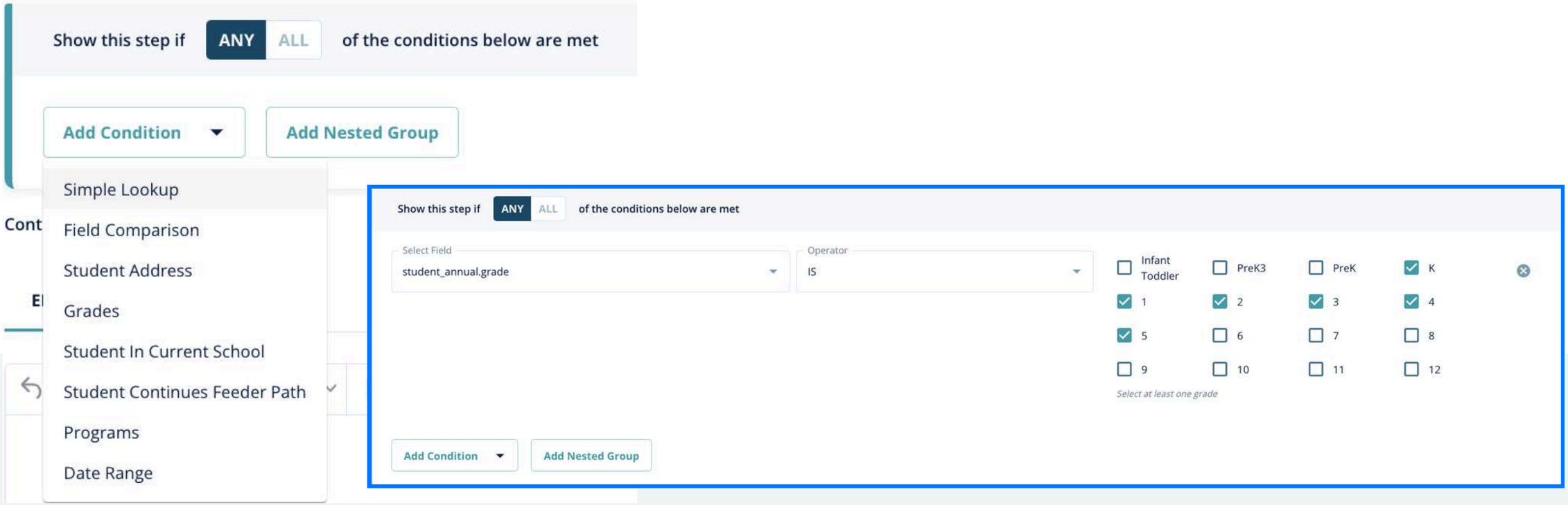
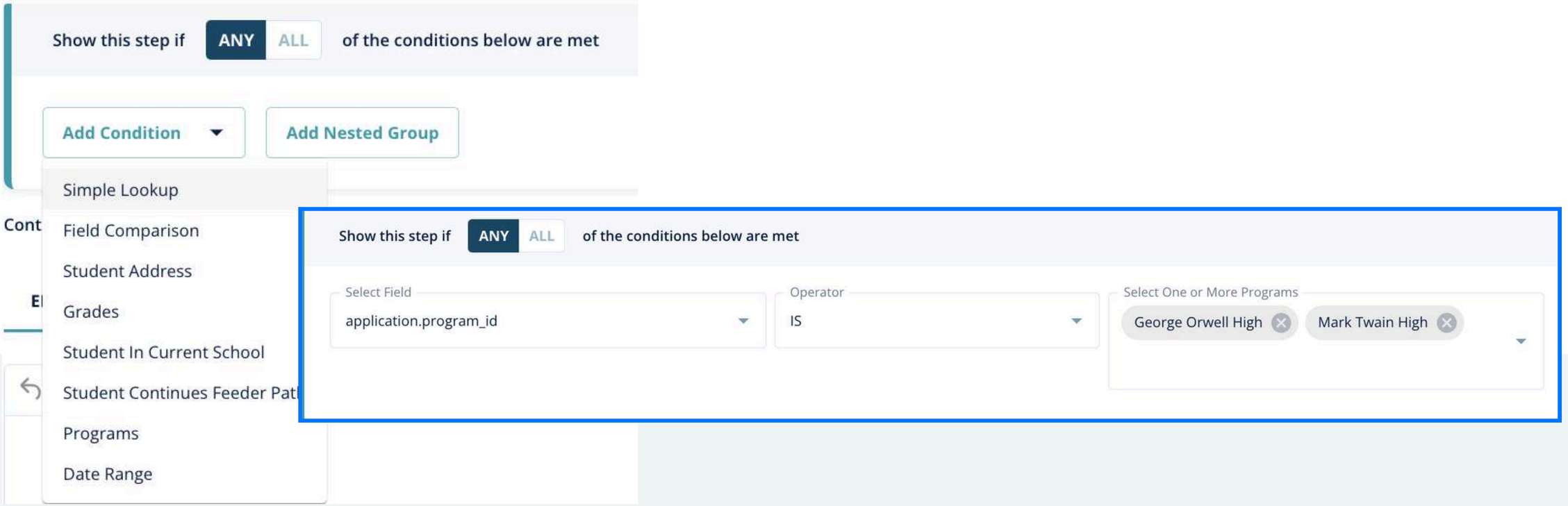
Restrict Grades



Restrict Programs



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Form Fields

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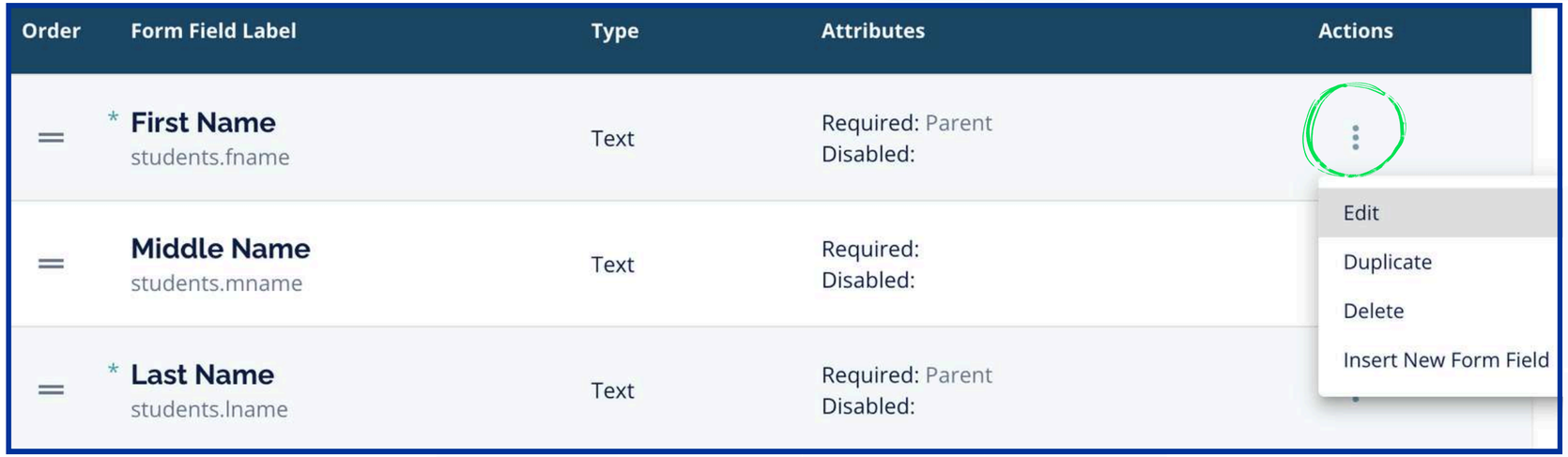
Each of the Fields have their own settings which can be edited by clicking the pencil icon

- Reorganize Fields
- Duplicate Fields
- Add New Fields
- Delete Existing Fields



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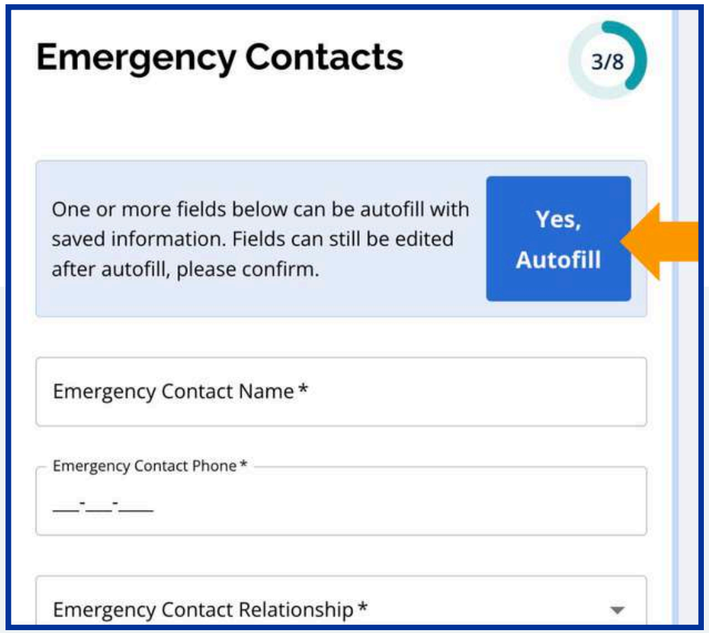
Autofill Fields

With Autofill Fields, parents have to enter shared information only once. When they start a new application for another child, those details can automatically carry over.

Order	Form Field Label	Type	Attributes	Autofill Data	Actions
=	**Guardian Instructions**	Content Snippet	Required: Disabled:	☐	⋮
=	* **Guardian 1 First Name** student_annual.guardian1_fname	Text	Required: Guardian / Admin Disabled:	☑	⋮
=	* **Guardian 1 Last Name** student_annual.guardian1_lname	Text	Required: Guardian / Admin Disabled:	☑	⋮



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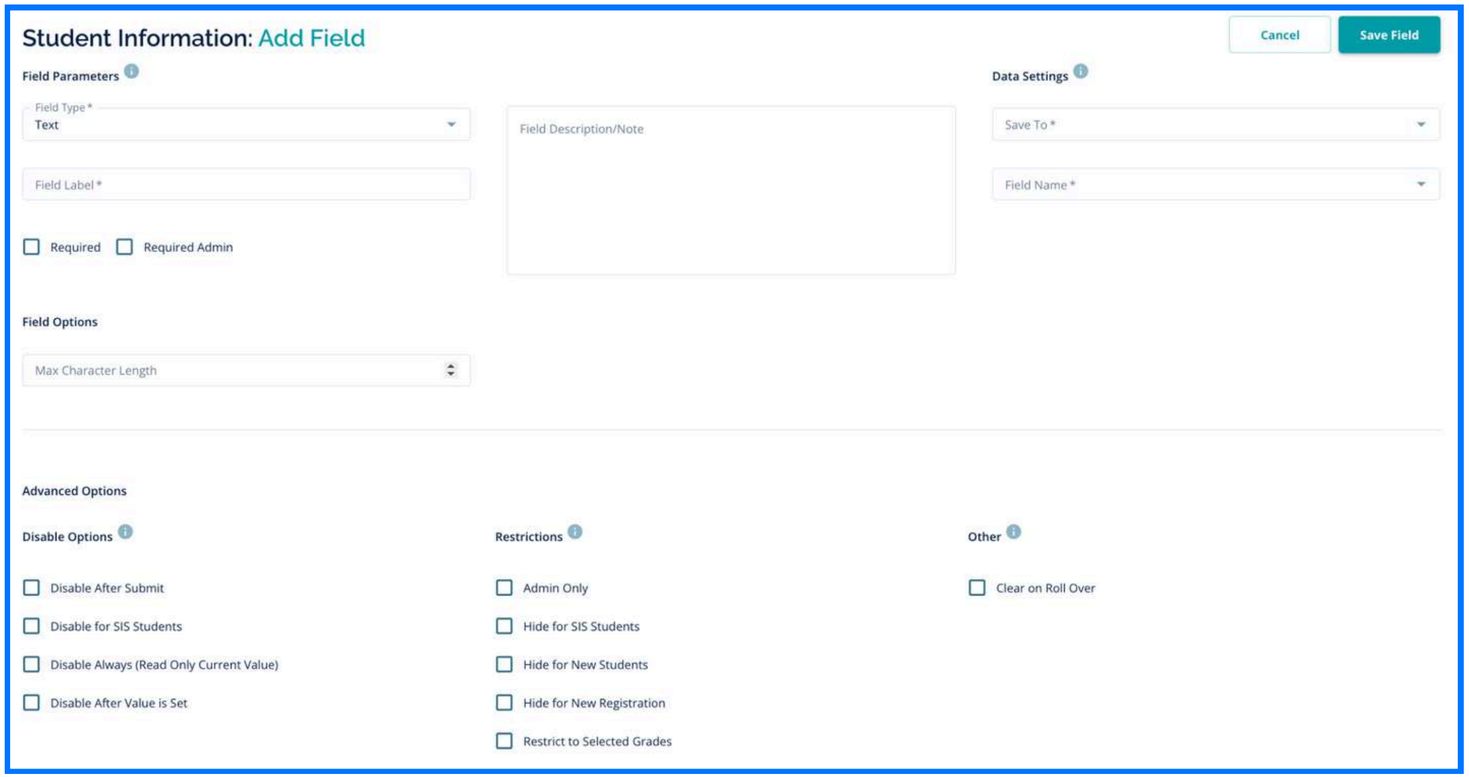
Field Settings



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Conditional Logic

1. **Confirm Process**
2. **Create Fields**
3. **Set Logic**
4. **Test**

This determines when and why specific items show or don't show within a form process. It gives the ability to have fields within a form step hide or show based on answers to other questions in that step

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Form Translations

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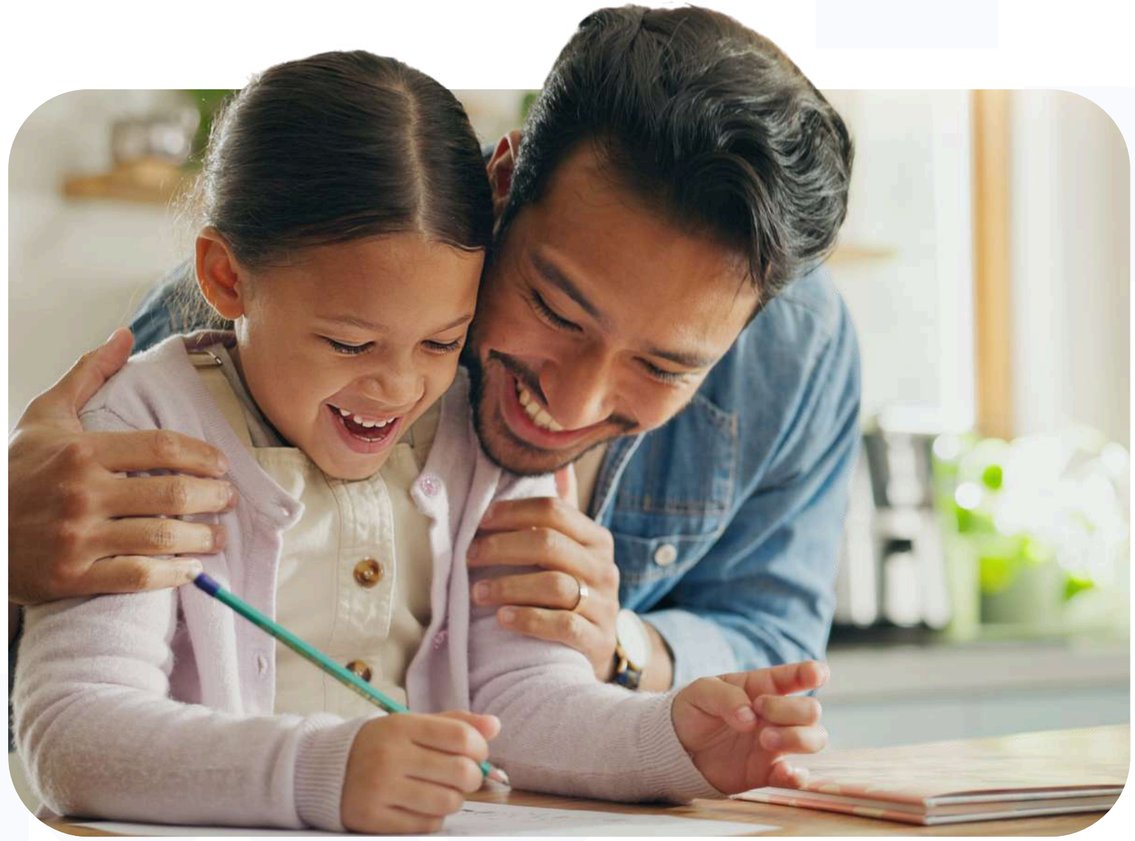
Google Translate

If you’re using Google Translate, you will not need to make any translations to your form!



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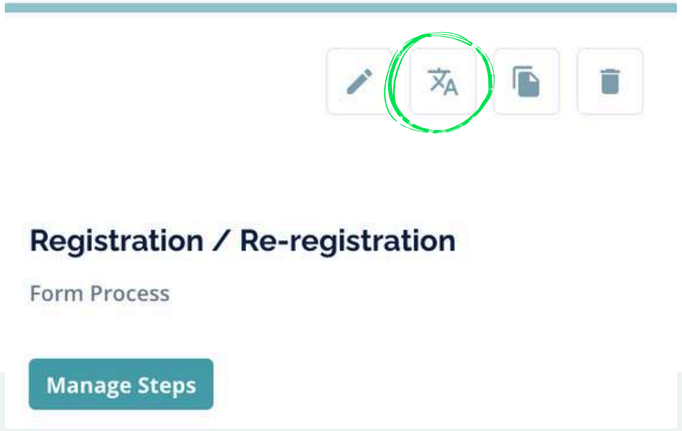
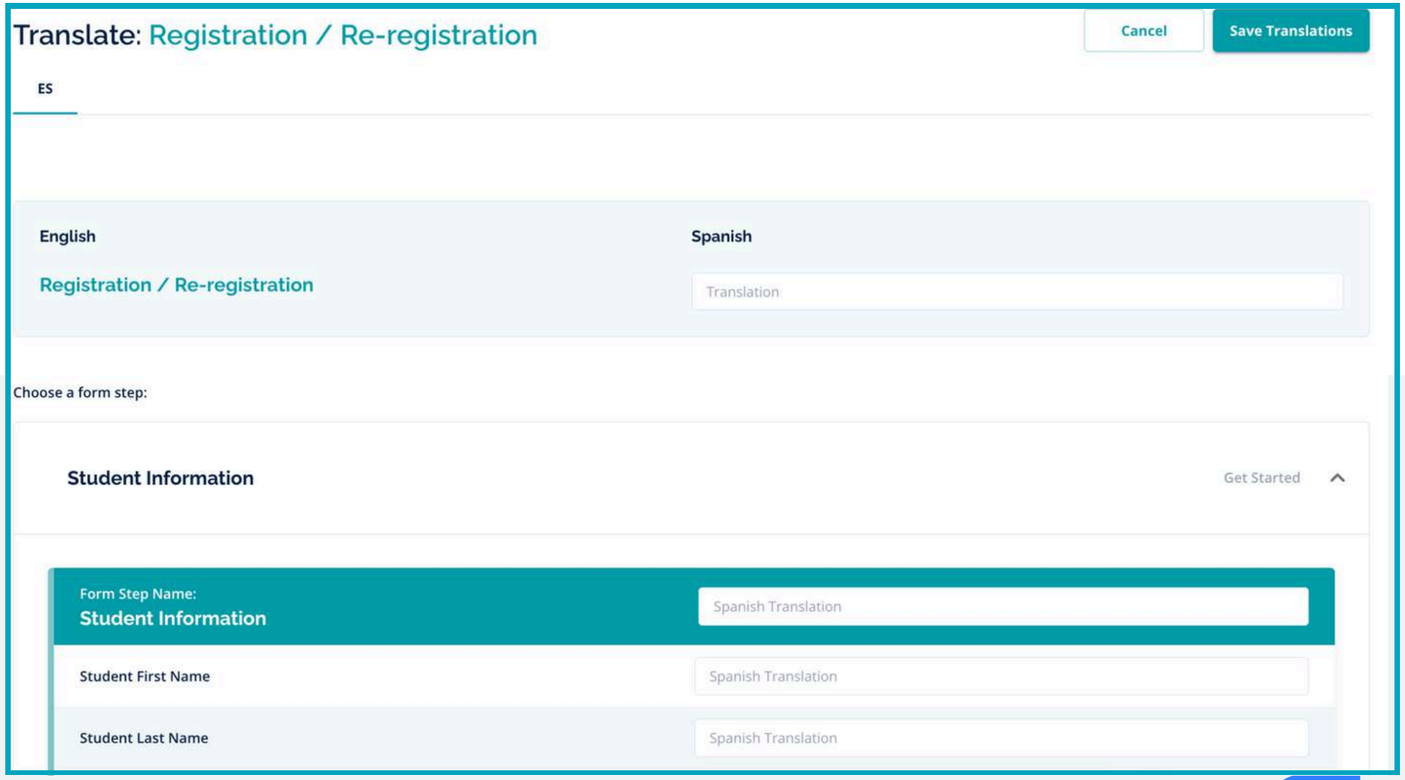
Custom Translations

If your school is NOT using Google Translate, and instead utilizing Custom Translations, you will want to make sure that any new form steps or fields that you have added are translated.





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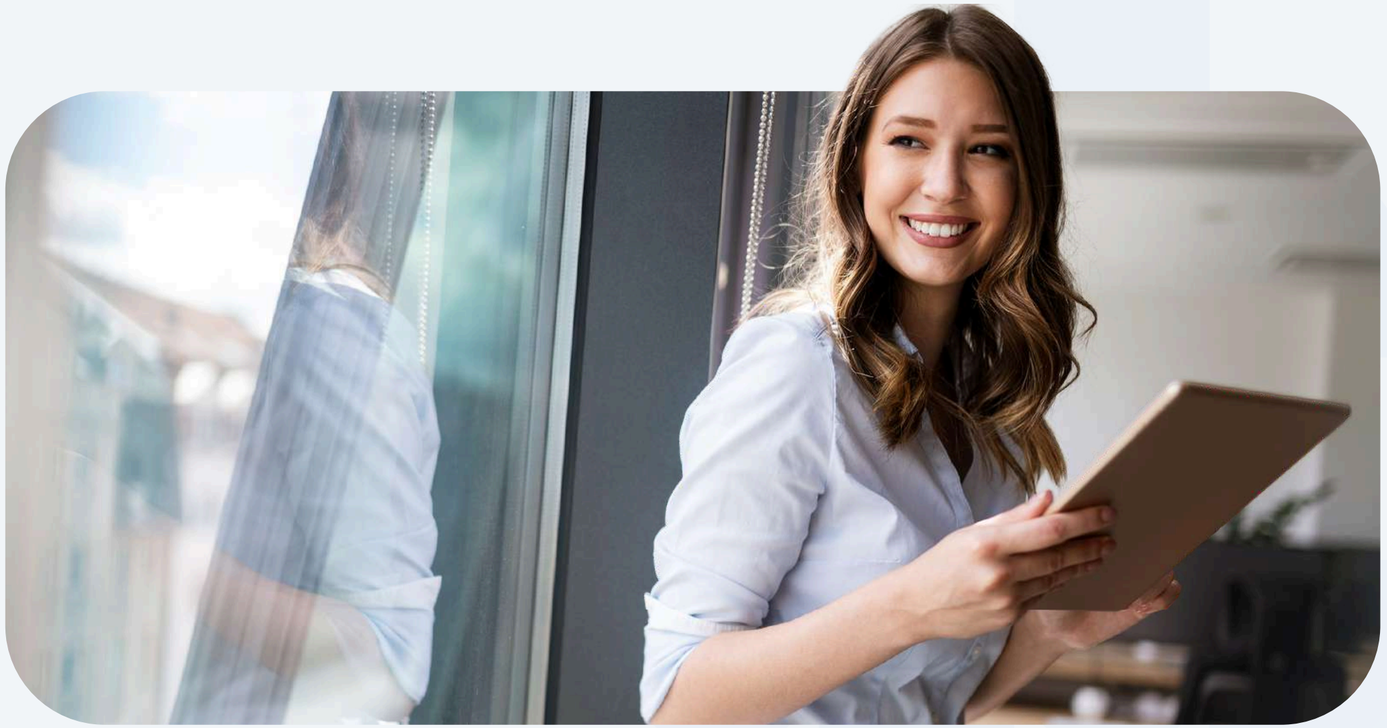
Test, Don’t Guess!

Testing is one of the most **IMPORTANT** steps in building your form process!



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Admin Resources

Zendesk

Help Articles
Release Notes
Webinar Calendar
Submit Tickets

Walk Me

Step-by-Step guides within your Enroll platform. Access by clicking the **Need Help** button

Community

Enroll Forum
Feature Requests
Beta Groups and Surveys

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THANK YOU!

SCAN ME

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