# Forms

Forms that were set up in the [Form Builder](#) are available in the Forms menu for the profiles that have permissions to the form (the profile has Can View and Can Edit permissions in the Form Settings in the Form Builder and the profile has View and Edit permissions for the form in Users > Profiles). Partially completed forms can be saved as a draft in the Drafts tab to be completed later. The Mass Print tab can be used to mass print forms. The History tab displays the forms that were submitted and the form's approval status. Users part of the approval flow for the form can approve and deny form requests and can view Approval History.

Completing a Form

1. In **Forms** menu, click the form.
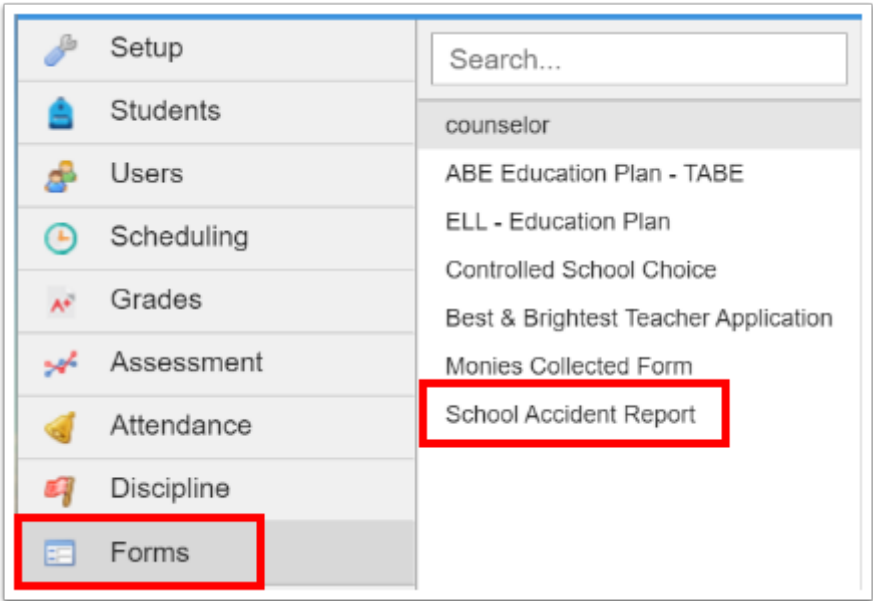
The form is displayed in the Form tab.

2. At the top of the screen, select your school, if applicable. The school that is currently selected at the top-right of the screen is selected in the pull-down by default.

If you select a school, your request will be reviewed only by staff at that school. If you do not select a school, anyone with permission in the district can approve or deny the request.

> ℹ️ The Select School pull-down will not display if the option "Remove School From Requests" option was selected on the form in the Form Builder.

3. Enter a **Title** for the form request. Today's date is automatically populated.

4. Complete the required fields on the form. Required fields are highlighted in red.

Some fields may auto-populate if a SQL collection was added to the field in the [Form Builder](). These fields will be grayed out and are not editable. Fields that your profile does not have permission to edit are also grayed out.

5. A drop-down with a pencil icon next to it allows the text of the selected option to be edited. After selecting an option in the drop-down, click the pencil icon.

6. The field changes from a drop-down to a text field that allows editing. In the text box, edit the text of the option.

7. Click the pencil icon again to convert the text field back into a drop-down.
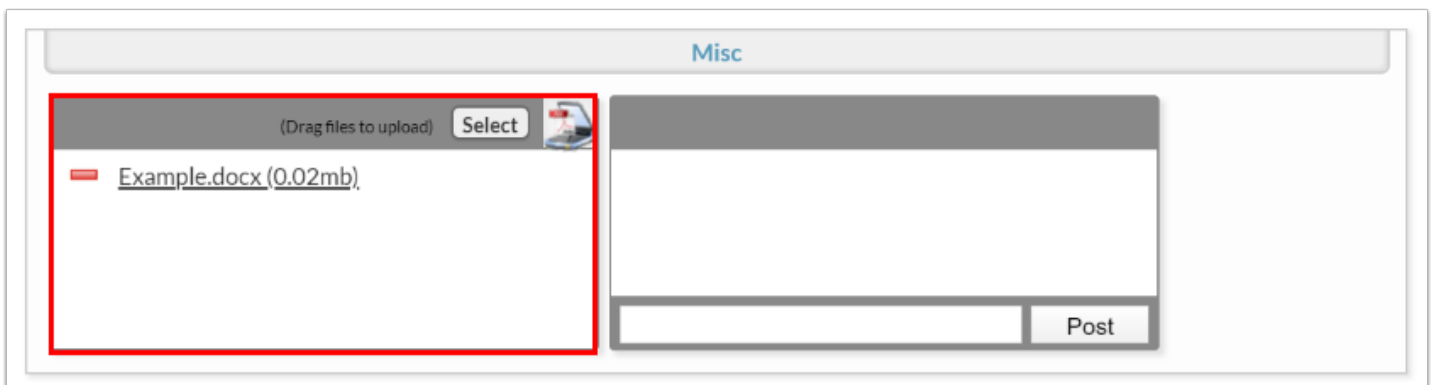
The drop-down now displays the selected option with the edited text.

Other - Bus
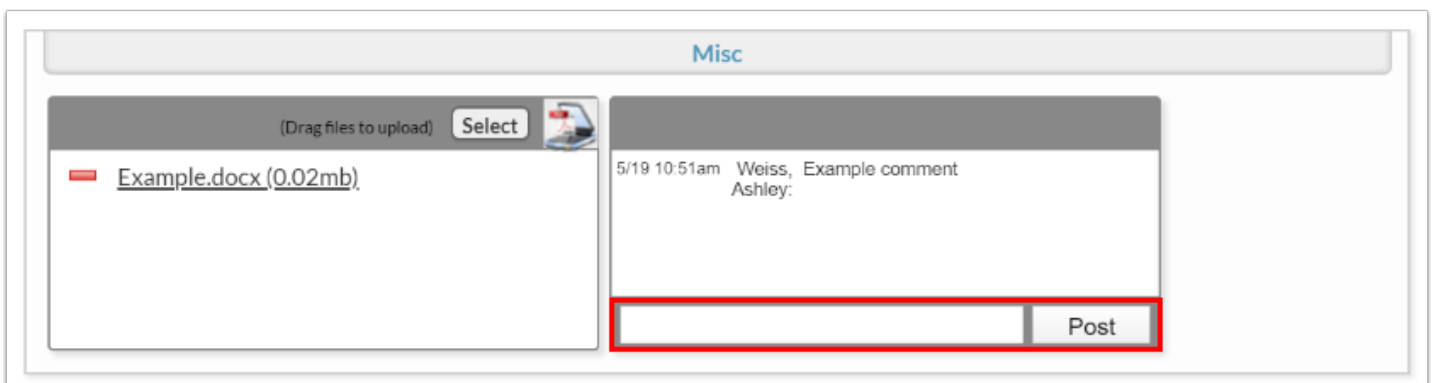
8. If needed, upload a file of additional documentation at the bottom of the screen under the Misc section.

You can select a file from your computer by clicking the **Select** button, drag a file from your computer into the file box, or scan a file by clicking the **Scan** icon.

> ℹ️ Uploading supporting documentation might be required for the form. An error message will display if you attempt to submit a form without uploading a file if it is required for the form.

Misc

(Drag files to upload) Select

Example.docx (0.02mb)

Post

9. If desired, enter a comment in the text box and click **Post**.

Misc

(Drag files to upload) Select

Example.docx (0.02mb)

5/19 10:51am Weiss, Example comment
Ashley:

Post

10. To discard the form and start a new draft, click **Start New Draft** at the top or bottom of the screen.

Any information you entered will be discarded and a new, blank form is displayed.

11. To print the form, click **Print** at the bottom of the screen.

A print dialog box for your printer is displayed to select your print options.

12. To save the form as a draft to complete at a later time, click **Save Draft** at the top or bottom of the screen.

The draft is saved and is available in the Drafts tab.

13. To submit the form, click **Submit Request** at the top or bottom of the screen.
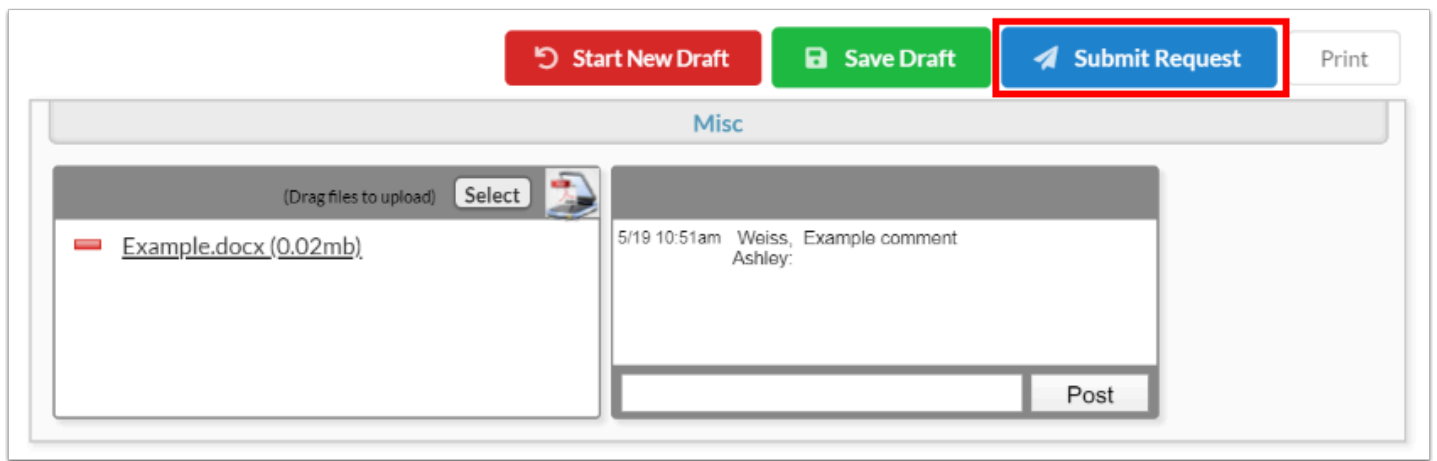
A confirmation message is displayed indicating that the form was submitted with options to **Print** the form or **Start New Request**.

Viewing a Draft Form

Draft forms that have been saved can be viewed and completed, or discarded if not needed.

1. In **Forms** menu, click the form.
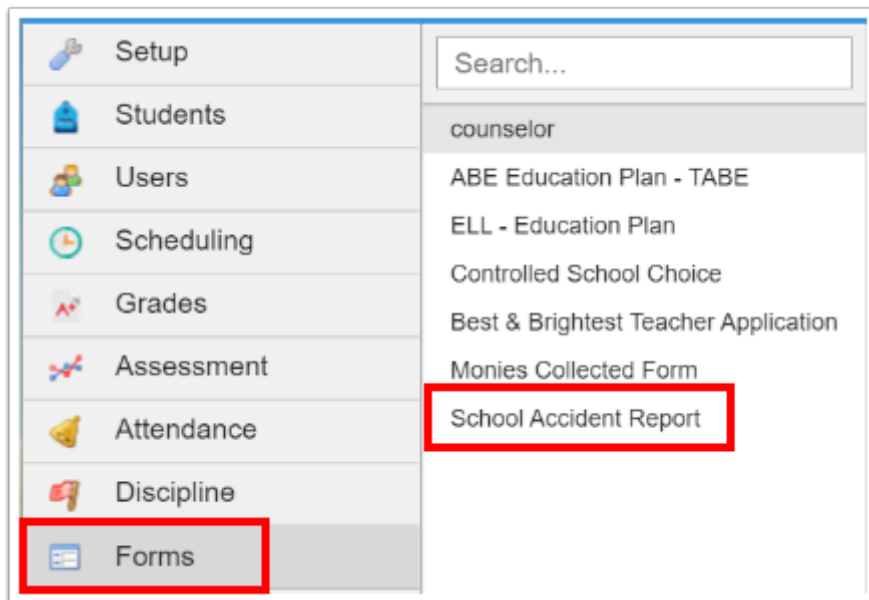
2. Click the **Drafts** tab.

All your saved drafts of the form are listed.
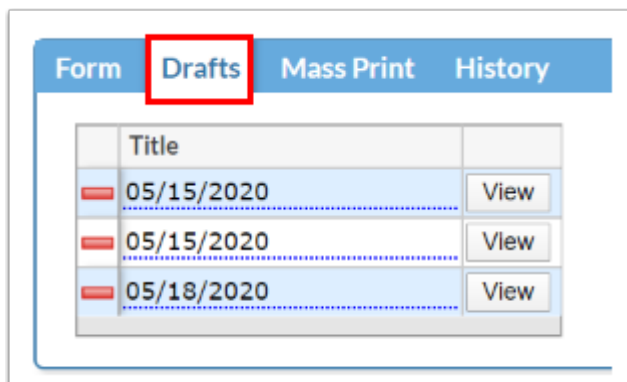
3. To delete a draft that is no longer needed, click the red minus sign next to the form title.
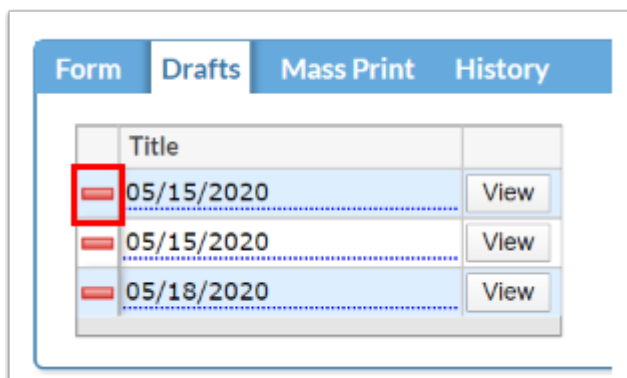
4. In the confirmation message, click **OK**.
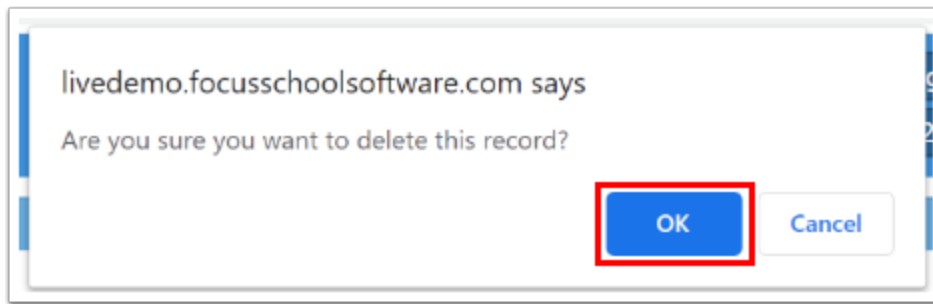
The draft form is deleted.

5. To view a draft form, click **View** next to the form title.
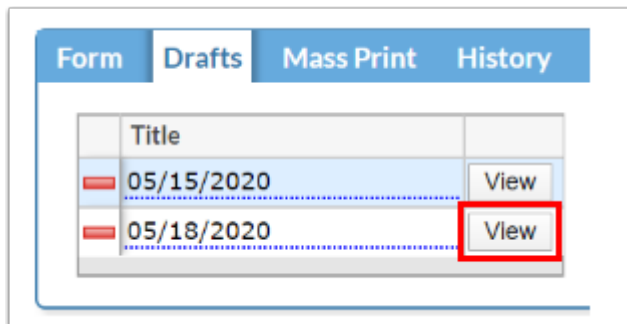
The draft form is loaded in the Form tab to view, complete, and submit.

Mass Printing Forms

The Mass Print tab allows you to print blank forms for one or multiple students. A form can be printed for each of the student's schedule records. If the Student Dropdown was included on the form in the Form Builder, it will be populated with the student's name.

1. In **Forms** menu, click the form.

2. Click the **Mass Print** tab.

3. Enter search criteria to locate the student.

4. Select **Multiple Records for each Schedule Record** if you would like to print a copy of the form for each of the student's schedule records.

5. Click **Search**.

6. Select the check box next to each student to print, or select the check box in the column header to select all students in the list.

> ℹ️ If the option "Multiple Records for each Schedule Record" was selected on the previous screen, the student will display multiple times, once for each schedule record. The course and section name is listed for each schedule record.

7. Click **Print Forms**.

The forms are displayed.

8. To print the forms, click **Print Forms**.

A print dialog box for your printer is displayed to select your print options.

9. To return to the form screen, click **Return to Focus**.

Viewing Form History

The History tab displays all the forms you have submitted and each form's approval status. Depending on if your profile has the permission "View All History" for a form, you may be able to see the history of all the forms submitted at your school(s).

ℹ️ If your form was voided by an administrator, it will no longer display in the History tab.

1. In **Forms** menu, click the form.
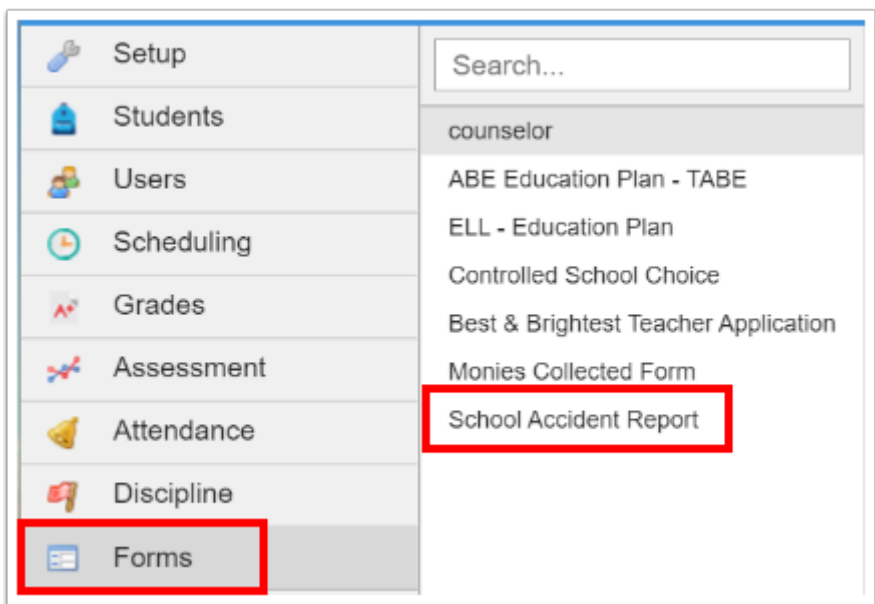
2. Click the **History** tab.

All of your submitted forms are listed. The Approval Status column indicates if the form is approved, denied, or pending approval.

3. If you have permissions to view all forms that have been submitted at your school(s) for the particular form, select the **Show All** check box.

4. Hover over the Pending hour glass to view the users who need to approve the form.

Hovering over the Approved check mark or Denied x displays who approved or denied the form and the date and time it was approved or denied.

> 💡 When a Student Dropdown component is included on a form, the column will display a link that will open Student Info.

5. To view a form, click the **Instance ID** link.

The form displays in the Form tab. The form fields are grayed out and are not editable. The form can be printed by clicking the Print button.

Approving or Denying a Form Request

Users with approval permissions to approve/deny the form request (set up in Approval Flow) can view the submitted form, complete any necessary fields, save the form as a draft, and approve or deny the form request.

ℹ️ A Portal alert displays for form requests that are awaiting your approval. You can click the alert link to go directly to the Pending Approval tab of the form instead of accessing the form from the Forms menu.

1. In **Forms** menu, click the form.

2. Click the **Pending Approval** tab.

ℹ️ The Student ID and Student Name columns are included in the Pending Approval table when the Student Dropdown component is included on the form with the field name Student_Dropdown.

ℹ️ When a field on the form has the "Include in Pending Approval" option enabled in the Form Builder, a column will be included in the Pending Approval table with the field name as the column header and the value of the field displaying in the column. The field name and value will also be included in the email sent to the form approver(s) indicating that a form requires attention.

When a Student Dropdown component is included on a form, the column will display a link that will open Student Info.

3. Click **View** next to the form.

The form is loaded in the Form tab.

4. Complete any fields that require your input. Required fields are highlighted in red.

5. If the form needs to be returned to the originator for additional information or correction, click **Back to Originator** at the top or bottom of the screen.
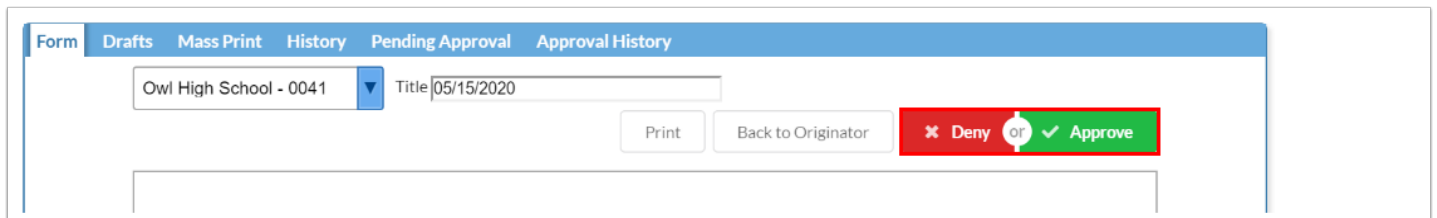

The form will go back into the Drafts tab for the originator.

6. If you need to add or edit data on the form, make your changes and click **Save Draft**.

7. When ready to approve or deny the form, click **Approve** or **Deny** at the top or bottom of the screen.

Viewing Approval History
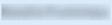
Users with approval permissions to approve/deny the form (set up in Approval Flow) can view the forms that they previously approved or denied and the forms that are pending approval in the Approval History tab.

1. In **Forms** menu, click the form.
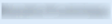
2. Click the **Approval History** tab.

Any forms you have previously approved, denied, or are pending approval are listed.

3. Click **View** next to the form you want to view.

The form is loaded in the Form tab. Fields are grayed out and are not editable on forms that have already been approved or denied. The form can be printed by clicking the Print button.

Voiding a Form

When the system preference "Enable Voiding of Forms" is selected in Setup > System Preferences > General tab, administrators can void forms. Voiding a form moves the form to the Voided tab. The form no longer displays in the History tab for the user who submitted the form and for all other users.

1. In **Forms** menu, click the form.
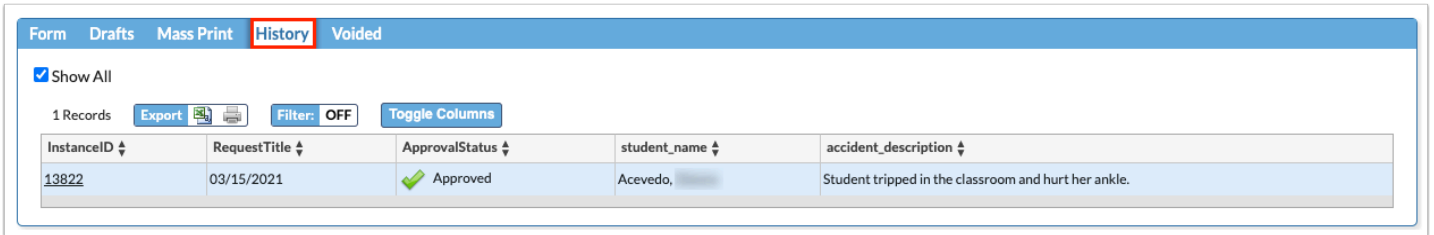
2. Click the **History** tab.

If needed, select **Show All** to view all forms.
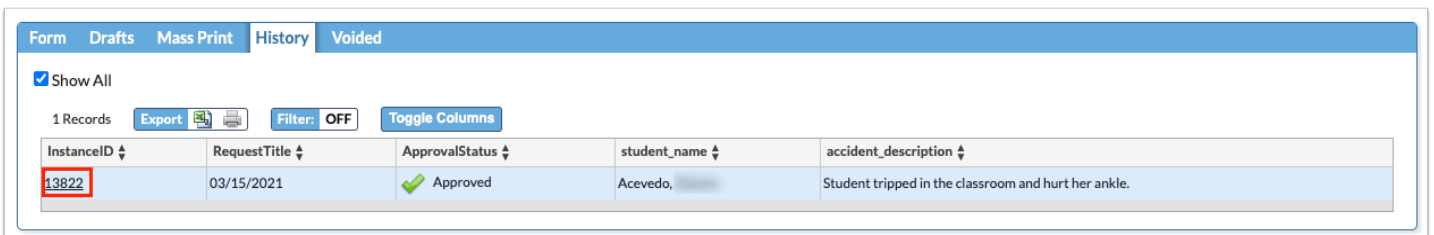
3. Click the **InstanceID** link to view the form.
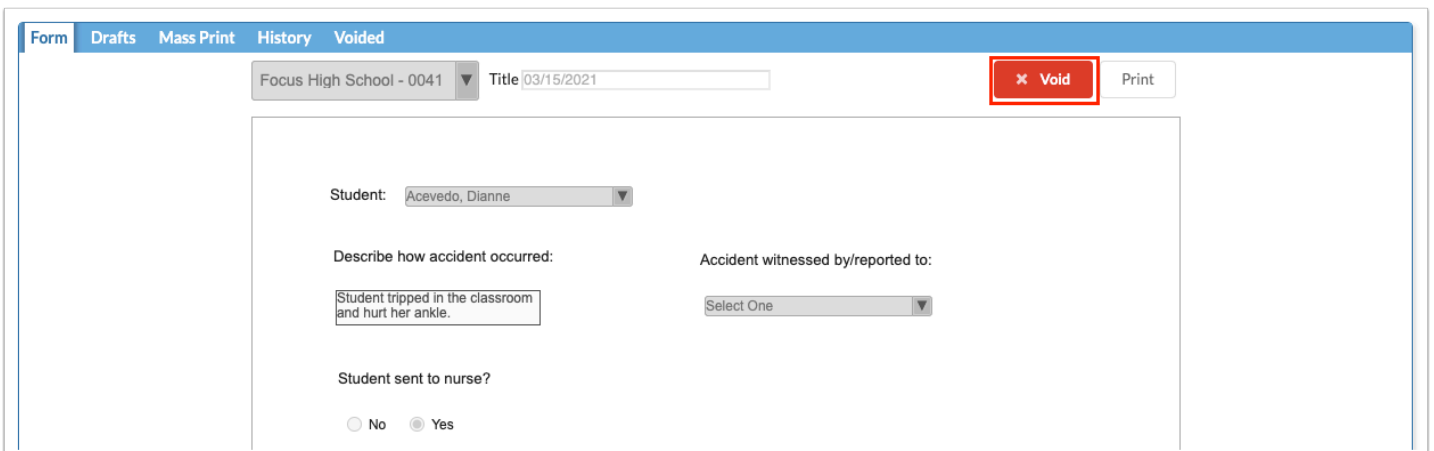
4. Click **Void** at the top or bottom of the screen.
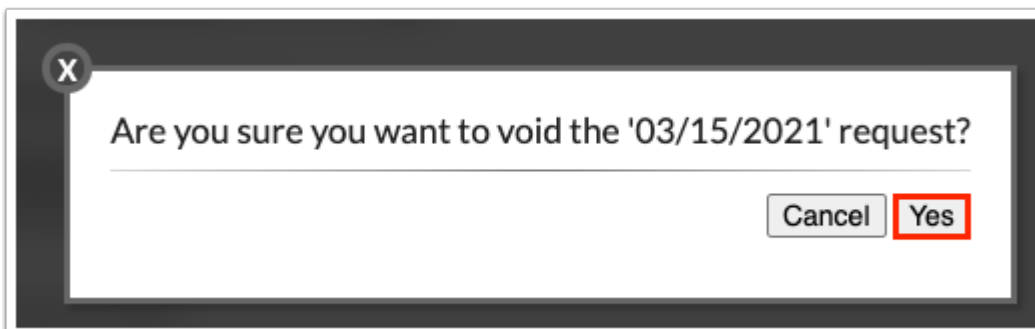
5. Click **Yes** to confirm.
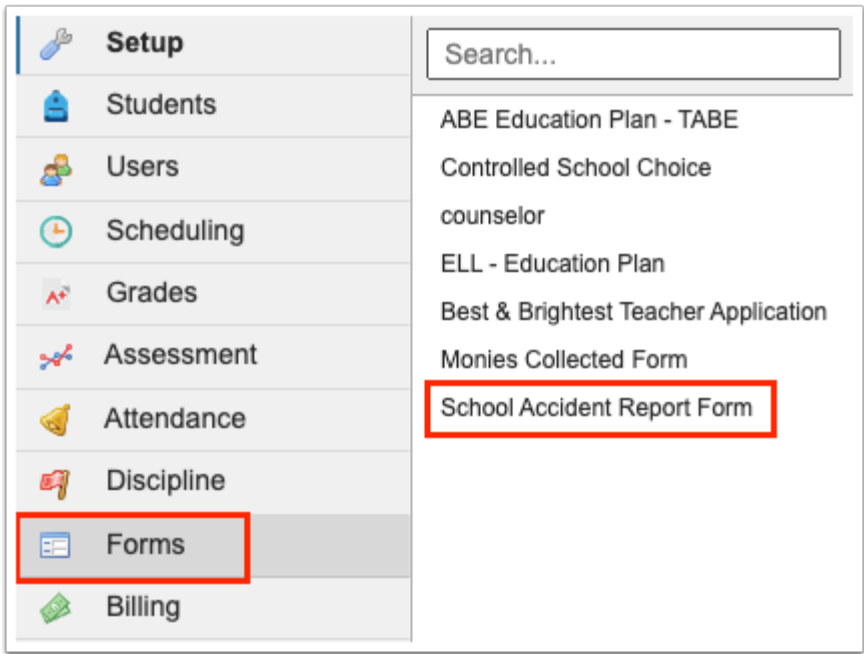
The form is moved to the Voided tab. Only administrator users with the profile permission "View Voided Forms" can view the Voided tab. See Viewing Voided Forms below for more information.

Viewing Voided Forms

Administrator users with the profile permission "View Voided Forms" enabled for the Form Builder in Users > Profiles are able to view voided forms in the Voided tab. Users without this profile permission will not see the Voided tab at all.
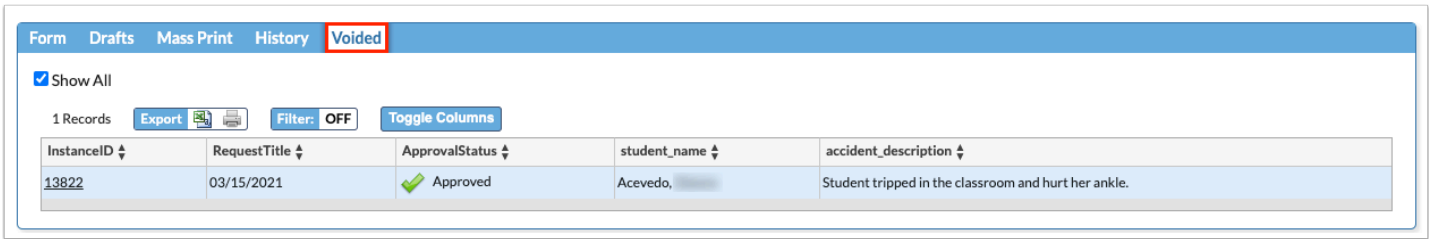
1. In **Forms** menu, click the form.

2. Click the **Voided** tab.

ℹ If needed, select **Show All** to view all forms.

3. Click the **InstanceID** link to view the form.

"VOIDED" displays at the top of the form when viewed in Focus and when printing the form.

Viewing a Student's Forms in Student Info

The Forms category in Student Info displays all the Form Builder forms the student is attached to (forms where the student was selected in the student dropdown component on the form). On the Student Fields screen, the applicable profiles should be given view permissions to the computed table "Forms."

1. In the **Students** menu, click **Student Info**.
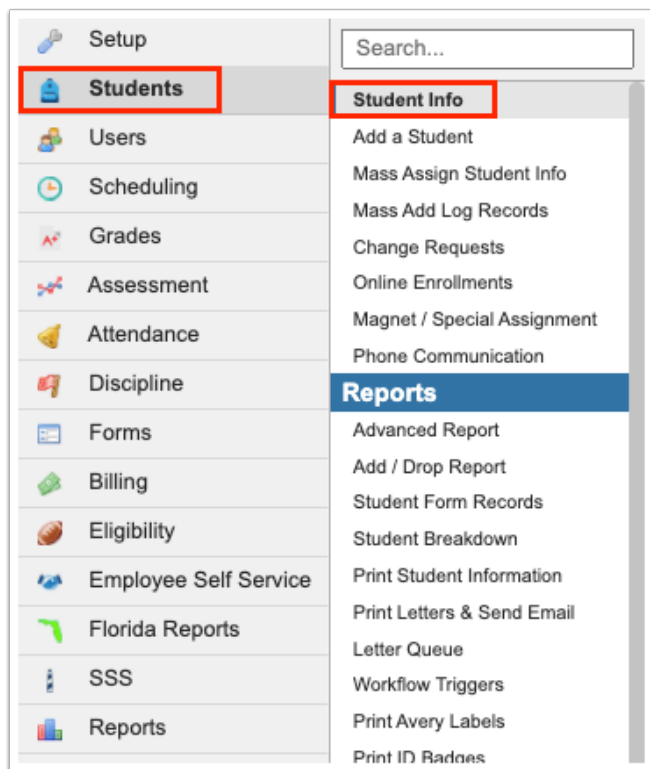
2. On the Search Screen, search for and select the student.

> ℹ️ See [Searching for Students](#) for detailed instructions on the various ways to search for students.

3. Click the **Forms** tab on the left side of the screen.

The Forms table displays the instance ID, form, form status, and title.

4. Click the title link to view the form in a new tab.

> ℹ️ Users who do not have view permissions for the form will not see the link to the form.