Custom Forms Data Collection & Auto Distribution to Users

What will be covered:

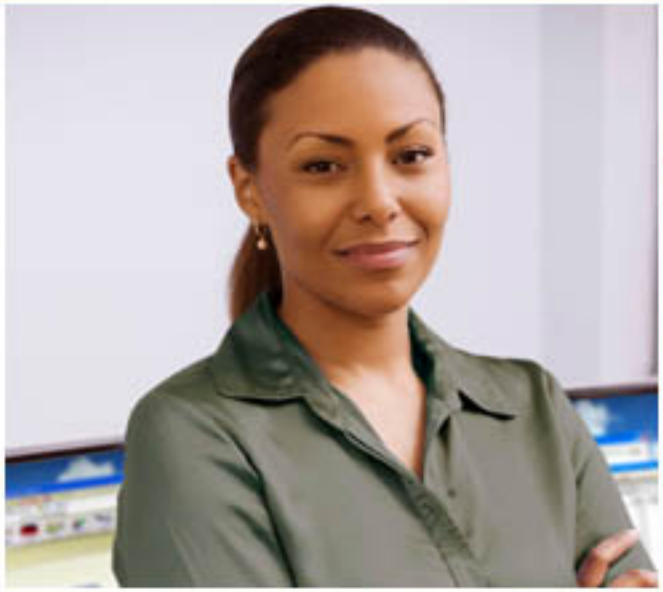
This session will cover the process of setting up your existing Custom Forms so that data can be harvested and to allow for automating reports and student lists to send information to users who need it. Additionally copies of specific forms, such as enrollment or registration forms can be auto-generated and sent to specific contacts via email utilizing Processing Lists and Scheduled Tasks. The sample for this presentation will be using the Custom Form for Home Language Survey combined with the Online Enrollment (NSOE) process.

- Outlining and Planning the Sequences for Processing Data (Brainstorming)
- Overview of data to obtain (NSOE Setup & Custom Forms)
- Report Building to create Processing Lists
    1. Example: User Defined Report (New Student Online Enrollment)
        - Process report to Establish Processing List
        - Revisit Report to Update Parameters & Processing List
            - Replace Names (Processing List)
- Schedule Task (Update) for Report to Update the Processing List
- Data Mining (If Necessary) to Update the Processing List
    1. Narrowing List of New Names Enrolling to District
    2. Reestablish Processing List with Change Names Feature
- Custom Forms Report
    1. Create Template for Desired (Enrollment/Registration) Form
    2. Print Using Processing List
    3. Schedule Task with Email to User

Links to additional resources:

NOTE: Insert the link to the PDF or power point used for the session.

User Defined Report (NSOE)
Processing Lists
Scheduled Tasks
Data Mining



Texas Skyward User Group Conference

Custom Forms Data Collection & Auto Distribution to Users

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Eagle Mountain-Saginaw ISD

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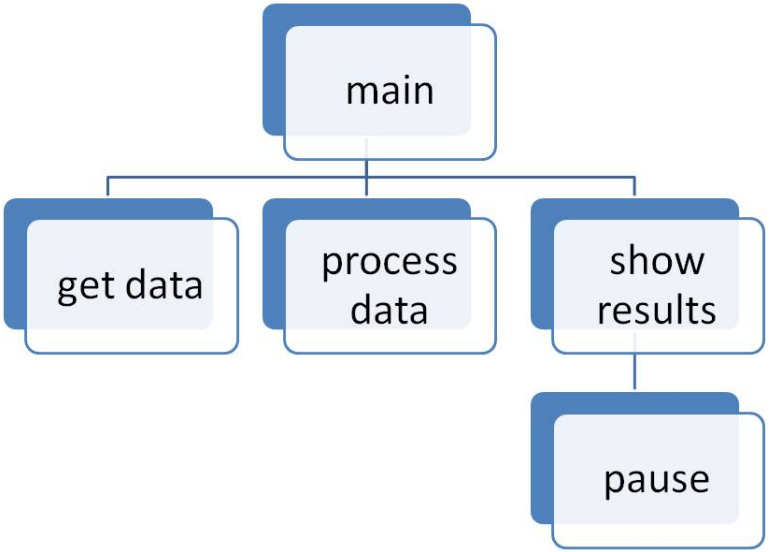
Outline and plan the sequences for processing data (brainstorm). Plan out your data in steps to understand the order required to produce data and **Processing Lists**. The lists will drive the data and reports.



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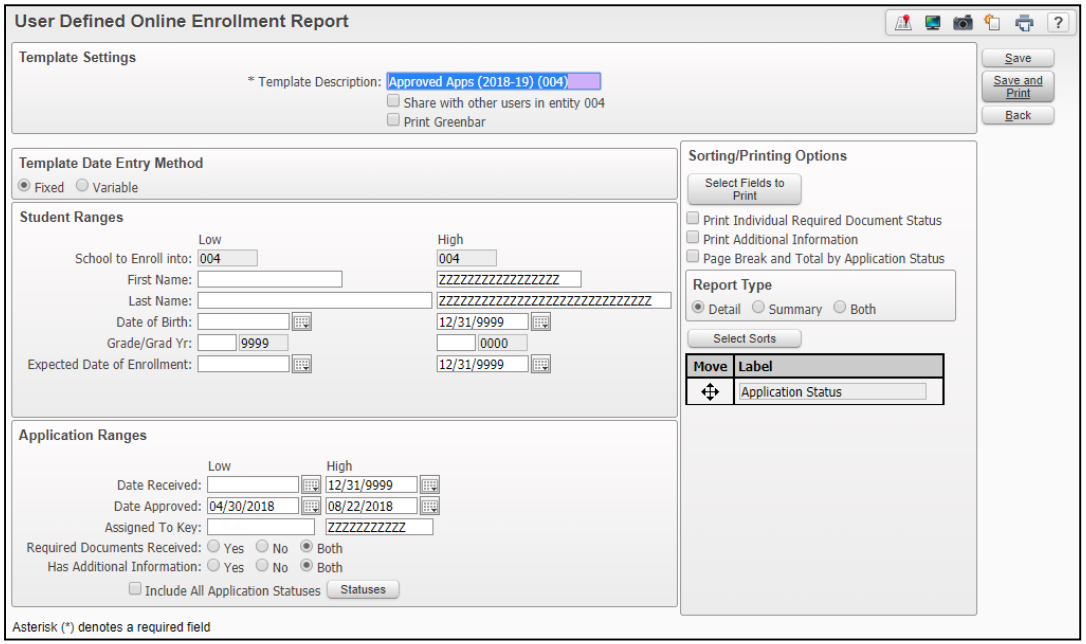
Create a report template to produce a "starting list" of names for a **Processing List**. You have to create an initial list so that when you setup your scheduled process, there is a list to be updated.



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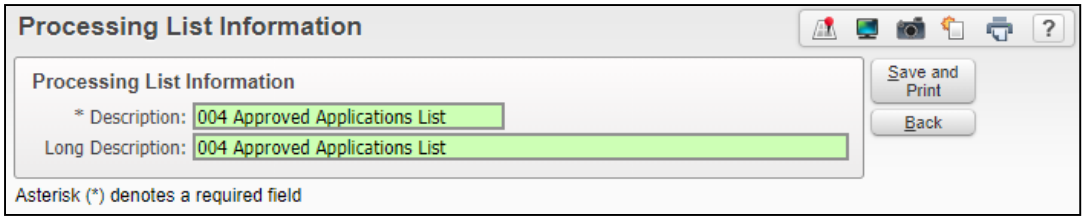
Using your selected report, proceed to create an initial **Processing List** utilizing the **Create New List** option when selecting **Print Using Processing List**.



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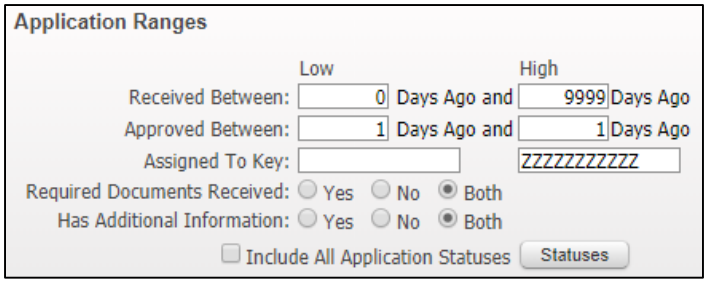
Upon establishing your **Processing List**, return to your report and create ranges that will be utilized as part of your **Scheduled Task**. For example, this update to the **User Defined Report** in **NSOE** will look at the previous day.



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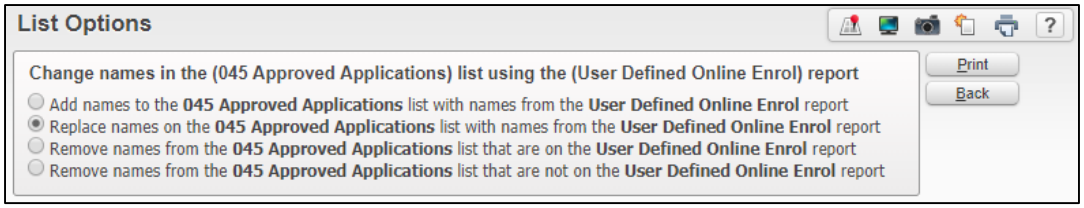
Return to the **Print Using Processing List** option for your selected report to process against the saved list. This time, utilize **Replace Names on the (Processing List Name) list with names from the (Report Name) report**. Proceed to **Print**.



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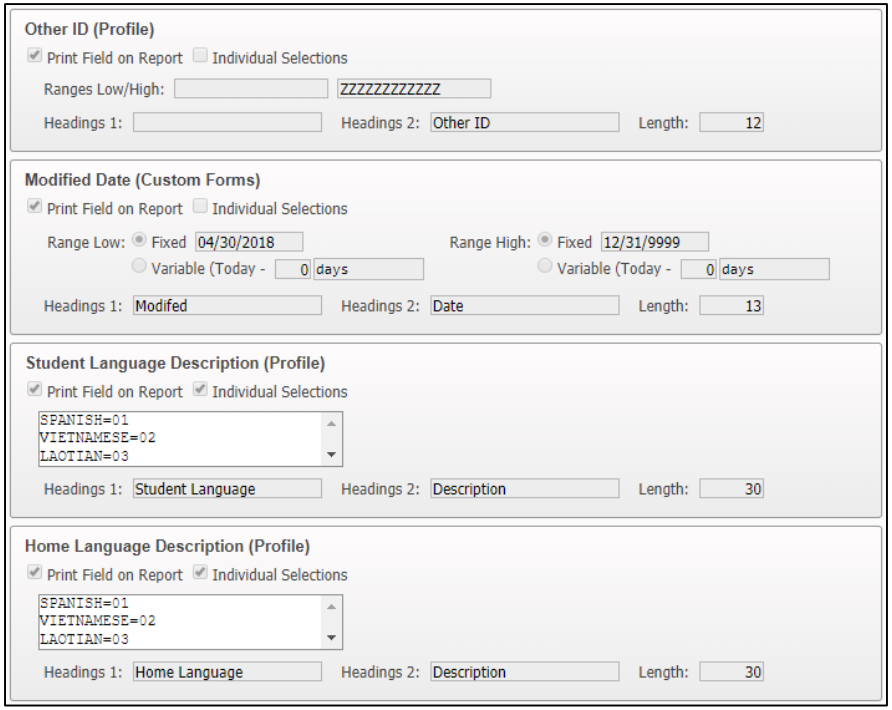
Use **Data Mining** if necessary to narrow down results of your **Processing List**. This acts as step two of the process, to weed out data that doesn't belong on the final product. Setup your report as needed to include **Ranges** to narrow data.



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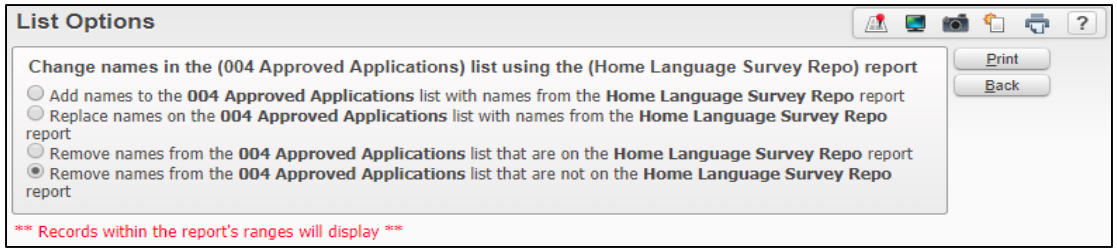
Print Using Processing List to update the existing list again. This will be the second **Scheduled Task**. Use the **Change Names in List** button, select **Remove names from the (List Name) list that are not on the (Data Mining Report Name) report**. Proceed to **Print** to update.



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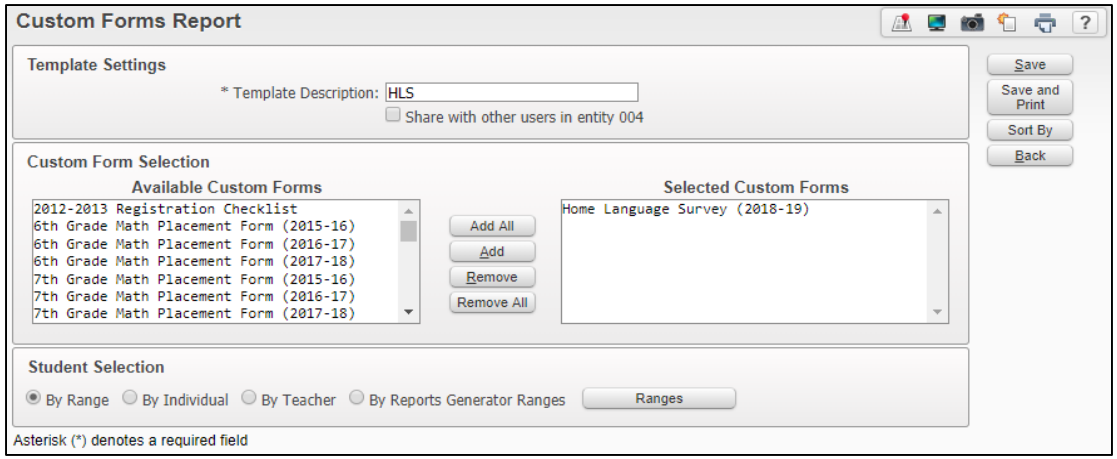
Using the **Custom Forms Report** option as the third **Scheduled Task**, create a report template and **Save**. **Print Using Processing List** one final time to generate form copies and proceed to **Schedule Task** to **email** necessary recipients.



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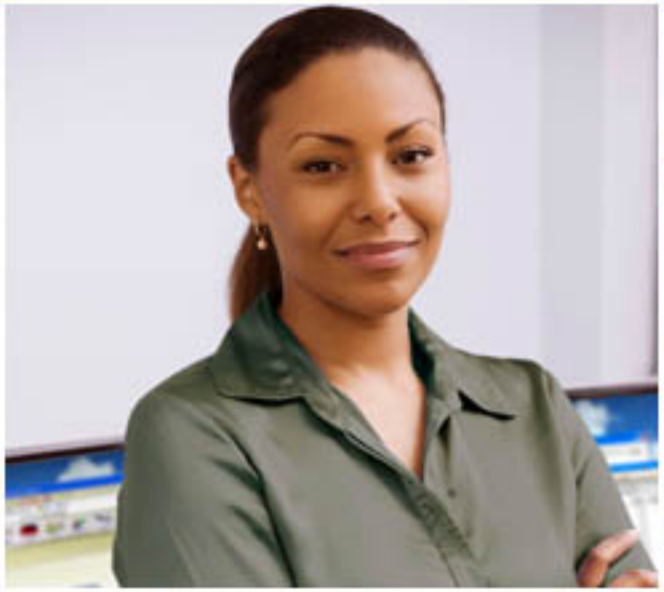
End of presentation –

Extra space for other notes



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THANK YOU FOR ATTENDING!

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