

Enrollment PowerUp: Workspace Configuration Workbook

Follow along below during the PowerUp. Beside each revision is the corresponding slide that the revision is on, step-by-step instructions, and links to additional resources.

CONFIGURATION > GENERAL > CHOOSE FORM

Revision	Slide	Resources
<p>1. Edit the All Submissions View and add the following: submission date, approval date & delivery date.</p> <p>a. Configuration > General > Choose Form > Views > Add Column > Choose Fields</p>	23	Configure Default Views
<p>2. Sort the All Submissions View by School and then Grade.</p> <p>a. Configuration > General > Choose Form > Views > Sorting > Add Column</p>	24	Configure Default Views
<p>3. Create a Custom View with the following:</p> <ul style="list-style-type: none"> - Name: Export - Permissioned Out to: Admin, Nurse - Columns: First & Last Name, Grade, Phone Number - Only pull in students submitted prior to 08/10/2022 and School B <p>a. Configuration > General > Choose Form > Views > Create Submissions View</p>	25	Configure Default Views

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<p>4. Create a Student Record View for Nurses</p> <p>a. Configuration > General > Choose Form > Student Record > Create View</p>	26	Student Record Views
<p>5. Create manual tags for the following: review address, review documents and admin reviewed.</p> <p>a. Configuration > General > Choose Form > Tags > Create Submissions Tag > Enter Name > Assign Profile > Save</p>	27	Tags
<p>6. Create an automatic tag that tags a record when documents are missing.</p> <p>a. Configuration > General > Choose Form > Tags > Create Submissions Tag > Enter Name > Assign Profile > Check Use Rules > Custom Rule Type > Create New Rule</p>	28	Tags
<p>7. Create a filter to show all records that said Yes to if they had allergies.</p> <p>a. Configuration > General > Choose Form > Rules > Enter Name > Choose Filter Category > Set up Rule</p>	29	Rules
<p>8. Create a tag rule that would be used for a tag for when a record says Yes for other medical issues and is in grade 7.</p> <p>a. Configuration > General > Choose Form > Rules > Enter Name > Choose Tag Rule Category > Set up Rule</p>	30	Rules

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<p>9. Create a permission rule for admins so they only see 1 school.</p> <p>a. Configuration > General > Choose Form > Rules > Enter Name > Choose Permission Rule Category > Set Up Rule</p> <p>b. To add to an admins profile</p> <p>i. Configuration > General > Choose Form > Permissions > Find Admin > Edit > Choose Permission Rule > Add > Save</p>	31	Rules Permissions
<p>10. Set up Approval Criteria to ensure the new manual tags added in previous revisions are included in Approval Criteria.</p> <p>a. Configuration > General > Choose Form > Approval Criteria > Add Rule > Save</p>	32	Approval Criteria
<p>11. Add a new Profile for front office staff members.</p> <p>a. Configuration > General > Choose Form > Permission > Add Profile > Enter Title</p>	33	Profiles & Permissions Admin Accounts
<p>12. Add Submission Notification Email to an admin profile.</p>	34	Admin Notification

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<p>a. Configuration > General > Choose Form > Permission > Export Permissions > Change SubmissionNotificationEmail column to TRUE > Add expression to the column SubmissionNotificationEmailExpression > Choose File (import/export permissions)</p>		
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