

E-Com User Training

General Session 1: Forms

Form Navigation

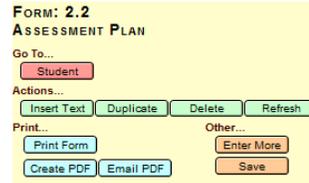
- Every form includes a form navigation area on the right-hand side. This area is highlighted in yellow.
- Multi-page forms also include a rolling header with some of the same functions, as well as the ability to move from page to page.

Actions: [Insert Text](#) [Enter More](#) [Print Form](#) Go To: [Student](#) [Top](#) [2](#) [3](#) [4](#) **FORM: 4.5 EVAL REPORT**

- The yellow navigation sidebar consists of three sections.

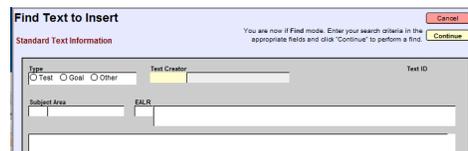
Form Navigation cont.

- The first section tells you which form you are on, and allows you to manipulate the form in various ways.
- The actions available to you in this section include:
 - Returning to the Student screen
 - Adding preformatted text, duplicating the form, deleting the form, and refreshing the dates and other information
 - Printing the form, creating a PDF of the form, or emailing the PDF
 - Entering more text, and saving the form manually



Form Navigation: Actions

- Adding preformatted text:
 - E-Com comes with predefined text, mostly goals and tests. Your E-Com admin may have also added “boilerplate” text for your district.
 - When you click the “InsertText” button, you are taken to a Find screen in the Insert Text area.



- Enter criteria to find the text you want, then hit the yellow Continue button.
- You may get more than one return. Scroll down till you find the entry you want, and click the Copy button next to that text.
- Paste into the appropriate field on the form.
- **Note: It may be faster or more efficient to set up template batches/forms that you can duplicate from student to student.**

Form Navigation: Actions

- Duplicating the form and refreshing the form will be covered in next month's session, along with duplicating & refreshing batches. (We will also cover "template batches" and "template forms.")
- Deleting the form – to delete a form, simply open the form that you wish to delete and click the Delete button.
- Please note: Forms deleted in error may be "undeleted" by an administrator. *Text* that has been deleted in error, however, cannot be recovered.

Form Navigation: Print

- The Print section of the form navigation allows you to print the form to your printer.
- You may also create a PDF of the form, as well as create and email a PDF of the form, if your district uses the email function in E-Com.
- Not all districts use the email function, in which case you can create a PDF, save it to your computer, and attach it to your email in the usual manner.
- Please follow the confidentiality policies in place at your district.

Form Navigation: Other

- Enter More – The Enter More button is used when the space provided for your input on the form is not large enough for all you have to say.
- Field size in E-Com is set for printing, so while you can type more than the field shows, when printed, the text that appears when your cursor is not within the field is the only text that will print.
- Use the Enter More button when your text overflows a field.
- It is good policy to label the text in the Additional Information field so that it is apparent which field is being continued.

Form Navigation: Other

- Save – A form is generally only saved when you leave the form screen to go to a different screen. If you want to save the form manually, you can do so without leaving the form by clicking the Save button.
- We recommend the use of Save button if your computer or network connection has been iffy, or when you may unexpectedly lose power (if you need to continue to work through a thunderstorm, for instance).

Form Navigation: Other Forms

- The second section of the form navigation area involves other forms.
- This section lists the batch, and shows all the other forms in that batch.
- You may move from one form to another simply by clicking on the form name.
- If you check the “View All” box, all forms assigned to this student will appear, not just the ones in the same batch.
- You can see if the forms are completed, and you may also print any of the forms from here.

Click form in batch to view: View All
Initial Evaluation (4/15/2012)

Done/Form	Descriptor	Date	Init
<input type="checkbox"/> 2.2 Assessment		4/15/12	T2
<input type="checkbox"/> 4.6 Eval Report		4/15/12	T2
<input type="checkbox"/> 28.1 Individual		4/15/12	T2
<input type="checkbox"/> 28.1 Individual		4/15/12	T2

* Review all dates to make sure they are correct!

Form Navigation: Other Information

- The third section of the form navigation just tells you a bit more about the form that is open.
- You can see when and by whom the form was created.
- You can see whether it has been completed, and whether it is locked.
- If the form is locked, you will not be able to make changes. An E-Com admin must unlock it for you before you can do so.
- The form data link is information that may be valuable to your administrator or to us if we need to troubleshoot an issue.

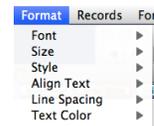
Date: 4/15/12	Created:	Modified:
Init: T2	By: T2	By: teststaff2
<input type="checkbox"/> Completed	On: 4/15/12	On: 4/15/12
<input type="checkbox"/> Handwritten	Form Data Link: 4033	
<input type="checkbox"/> Locked		

Formatting Text

- There are a number of ways you can format the text in a form field.
- You may change:
 - Font
 - Size
 - Style
 - Color
 - Alignment and
 - Line spacing
- You may also set tabs, particularly useful for tables inside of text fields.

Formatting Text: Characteristics

- In order to format text in a text field, first select the text to be formatted – it must be in a text field, it cannot be text set in the form itself.
- Then, once you have highlighted the text to be formatted, go up to the menu item “Format.”
- You may select one of the first few items if you want to change just one thing about the text in question – just the color, size, or style, for instance.
- You can also show the Formatting toolbar by selecting it from the “View” menu. The toolbar will appear at the very top of the E-Com form screen, and allows you to easily access the options.



Formatting Text: Tabs

- You may also set tabs within text, very useful for tables.
- Enter your cursor into the field where you want to set tabs.
- Go up to the menu bar and pull down the “View” menu.
- Select “Text Ruler”
- Set tabs just as you would do in Word
 - Be sure you have the correct text highlighted
 - Clicking the tab key in E-Com takes you from field to field on the forms. **To get a Tab character, type Control-Tab (Option -Tab on a Macintosh).**
- To change the type of tab (left, center, right, decimal), double-click on the tab in the ruler. A dialog box will appear, allowing you to change the tabs in the row of text where your cursor is.

Find and Replace Text

- Can be used when you have duplicated a form from one student to another and you need to change the name or pronoun gender.
- Open the form
- Select Find/Replace from the Edit menu
- Enter the appropriate text in the dialog box, and select the option you prefer (Find Next, to find the items one at a time and confirm each, Replace All to find and replace without confirmation).

Viewing Forms Side-by-Side

- Decide which two forms you want to see.
- Go to the first form.
- Go to the second form.
- While viewing the second form, pull down the “Go To” menu in the top menu bar.
- Select the first form, which should be listed at or near the top of the list that appears (the last 10 forms are shown).
- The two forms should now appear side by side.
- You may copy & paste text from one to the other, if you wish.
- Leave either form to close the side-by-side windows.

Viewing a Series of Forms

- If you want to view a series of the same forms for your assigned students, such as Progress reports, there’s an easy way to do this.
- On your Staff screen, go to the Active Forms tab.
- Select the form you want from the drop-down list, and determine if you want to see the forms in active or inactive student records.

The screenshot shows a software interface with a top navigation bar containing tabs: Case Mgr, Teacher, Other, To Do, Schools/Programs, and Active Forms. The Active Forms tab is selected. Below the tabs, there is a section for displaying active forms. It includes a label 'Displaying Active forms:' followed by a dropdown menu showing '132 Progress w/Obj'. Below this, there is a 'Student Type:' label with two radio buttons: 'Active' (which is selected) and 'Inactive'.

Series of Forms, cont.

- A list of the forms selected should appear, listed by student.

Done	Name	Eval Date	IEP Date	Description	Print
<input type="checkbox"/>	Debra Bonner	4/26/10		Leisure Recreation	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Theresa Coggins	2/6/10		1st semester	<input type="checkbox"/>
<input type="checkbox"/>	Theresa Coggins	2/6/10		2nd semester	<input type="checkbox"/>
<input type="checkbox"/>	Marty Duncan	1/17/10			<input type="checkbox"/>
<input type="checkbox"/>	Lloyd Isaac	4/28/09			<input type="checkbox"/>

- Clicking on the line you want to go to should bring you to that form for that student.
- To go back to the list of forms from a form, go up to the Form Options item on the top menu bar and select the “Go To Staff” option. This should bring you back to the student list on your staff page, where you can select the next form to be updated or viewed.
- Multiple forms may be printed from this screen. Simply check the “Print” checkbox and then hit the blue “Print Forms” button above it.

