



MyEducationBC

Online Forms and Workflows

May 2020 v1.0

Version History

Version	Date	Description
1.0	May 01, 2020	Initial document created

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1.0 Purpose

The purpose of this document is to describe, for District Support (Help Desk/Level 1) users, the setup required to utilize the online forms functionality in MyEducation BC.

This document will outline the following areas:

- Overview of the use of forms and workflows
- Creating and using custom text at the District level
- Assigning appropriate Add-On roles to school users and student contacts who will be using forms functionality
- Enabling “Task” widget for school users and student contacts who will be using forms functionality
- How School users send forms to student contacts
- How student contacts respond to forms

2.0 Using Forms and Workflows for Student Contacts

The core Aspen functionality for Forms and Workflows can be used for creating and managing online forms. BC Student Permission workflows can be initiated for multiple students, sending the form to the student's contacts to review, and provide responses to the requested permission via the Family Portal.

The forms reference codes provide a customizable free-form text field for the message to student contacts, and a place to enter text for the Yes or No response.

Two options for management of the permission forms are available. The forms can be managed through the **District** level or by **Schools**. If the District is managing the forms, the six District Permissions are used. If the Schools are managing the forms, the six School Permissions are used.

The add on role selected will determine which set of permissions the user sees in selection lists. (e.g. users with the add-on role: **BC Student Permission (District) - School Admin** will see the **District** set of permissions; users with the add-on role: **BC Student Permission (School) - School Admin** will see the **School** set of permissions). Help Desk/L1 support role will see both sets.

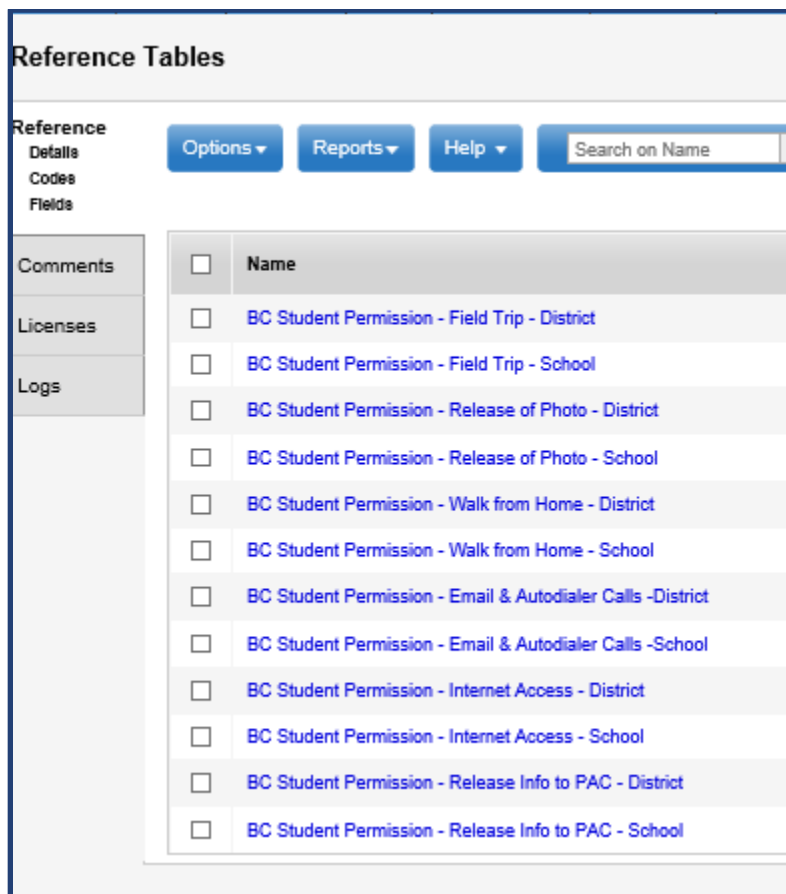
- BC Student Permission – District Email & Auto Dialer
- BC Student Permission – District Field Trip
- BC Student Permission – District Internet Access
- BC Student Permission – District PAC
- BC Student Permission – District Release of Photo
- BC Student Permission – District Walk from Home
- BC Student Permission – School Email & Auto Dialer
- BC Student Permission – School Field Trip
- BC Student Permission – School Internet Access
- BC Student Permission – School PAC
- BC Student Permission – School Release of Photo
- BC Student Permission – School Walk from Home

3.0 Setting up Custom Text for the Forms

The Custom Text area provides Districts with a place to enter the wording for the permission form. The Custom Text includes both the permission wording and a “Yes” and “No” answer response that includes District-specific Custom text.

The District or School user with access to reference tables is able to enter codes in the BC Student Permission reference tables in the *Admin TT > Data Dictionary > Reference*. A reference table is created at the Enterprise Level for each form workflow.

Users select the either the District or School Form Reference Tables based on the District practice of School/District forms.



Reference	Options	Reports	Help	Search on Name
Details				
Codes				
Fields				
Comments				
Licenses				
Logs				
	<input type="checkbox"/>	Name		
	<input type="checkbox"/>	BC Student Permission - Field Trip - District		
	<input type="checkbox"/>	BC Student Permission - Field Trip - School		
	<input type="checkbox"/>	BC Student Permission - Release of Photo - District		
	<input type="checkbox"/>	BC Student Permission - Release of Photo - School		
	<input type="checkbox"/>	BC Student Permission - Walk from Home - District		
	<input type="checkbox"/>	BC Student Permission - Walk from Home - School		
	<input type="checkbox"/>	BC Student Permission - Email & Autodialer Calls -District		
	<input type="checkbox"/>	BC Student Permission - Email & Autodialer Calls -School		
	<input type="checkbox"/>	BC Student Permission - Internet Access - District		
	<input type="checkbox"/>	BC Student Permission - Internet Access - School		
	<input type="checkbox"/>	BC Student Permission - Release Info to PAC - District		
	<input type="checkbox"/>	BC Student Permission - Release Info to PAC - School		

3.1 To Add the Custom Text in District

District view > Admin top tab > Data Dictionary side > Reference leaf

School view > Admin top tab > Reference side tab

1. Select the reference Table for the corresponding form
2. Click **Codes** leaf
3. Click **Options > Add**
4. Select Template: **BC Student Permission Text Template**

5. Enter **Code**
 - **District Codes** are the District number (e.g. 39)
 - **School Codes** are the School number (e.g. 5454013)
6. Enter **Description**
7. Enter Custom text, both “**Yes**” Text and “**No**” Text
8. Click **Save**

Pages District Student Staff Attendance Conduct Grades Assessment Schedule Extracurriculars Global Tools **Admin**

Reference Tables :: **BC Student Permission - Walk from Home :: 39**

Users Options Reports Help

Security Save Cancel BC Student Permission Text

Data Dictionary

Reference
Details
Codes
Fields

Comments

Logs

Code * 39

Description District 39 : Walk from Home Text

Arial 12 Normal A B I U x₂ x² I_x

In accordance School District No. 39 (Vancouver) requires consent to send you what in certain circumstances would constitute a commercial electronic message. Nothing in the Act restricts the district from emailing you newsletters, school or district updates but some emails may be viewed as a commercial electronic message (e.g. information about buying a school yearbook, book fairs, hot meals or field trips that cost money) or similar events and offers. Any offers or advertising via email will be directly related to the school's/district's operations. Your email will not be disclosed to anyone beyond the school, district, or parent advisory councils for business or commercial purposes. To ensure compliance with this legislation we are requesting your consent in writing. Please return the completed consent form to your school principal.

Yes - I GIVE MY CONSENT to Walk to Home to my child for purposes consistent with the above .

No - I DO NOT CONSENT to Walk to Home to my child for purposes not consistent with the above .

4.0 Assigning Add on Roles

Add on roles are assigned to both the school user and the student contacts that will initiate and complete the forms workflow. Use the role appropriate to how the District is managing the forms functionality (e.g. District role will see the District permission forms, School role will see the school forms)

The District user will assign the add-on role **BC Student Permission (District/School) – School Admin** to the school user sending the permission form workflow to the student contact(s).

The District user will assign the add-on role **BC Student Permission (District/School) – Student Contacts** to the student contact(s) who will provide permission approval on the form workflow.

4.1 Assign add on Role to School User

District view > Admin top tab > Filter = Staff > Users side tab > Select User

1. Click on **Role** leaf
2. Click **Options > Add**
3. Click the **Pick list Icon** on the name field
4. Search for **BC Student Permission (District/School) – School Admin** role
5. Select the role and **Save**

4.2 Assign add on Role to Student Contacts

*District view > Admin top tab > Filter = Contacts > Users side tab > Select the contacts(s) by name or Login – (use **Options > Show selected** for mass assign)*

1. Click on **Role** leaf
2. Click **Options > Add**
3. Click **Pick list Icon** on the name field
4. Search for **BC Student Permission (District/School) – Student Contacts** role
5. Select the role and **Save**

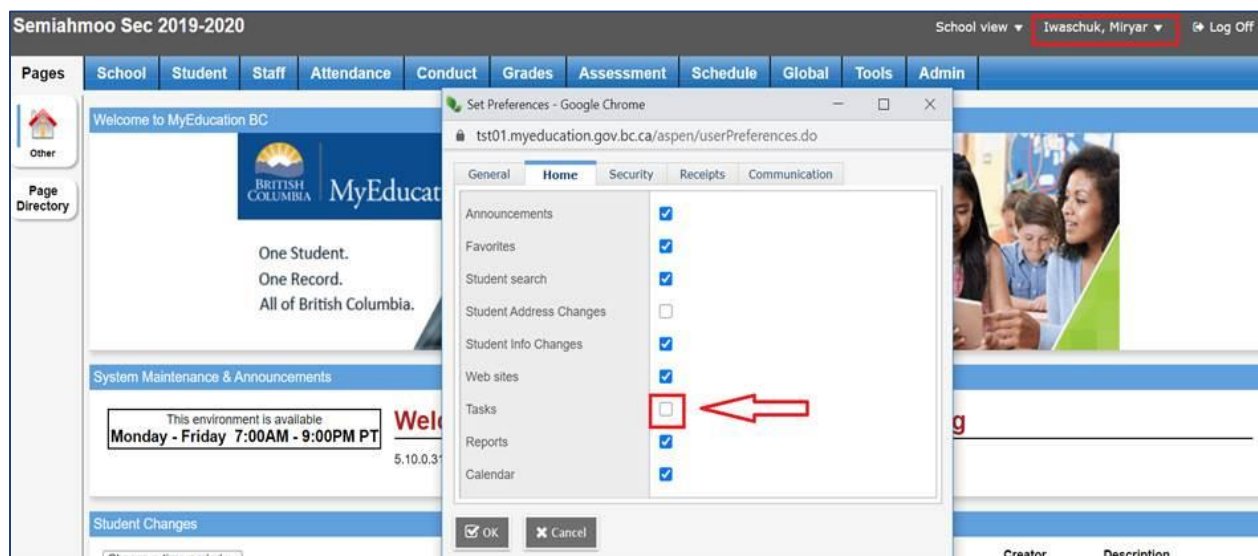
Exercise caution when using Mass Assign as there is no functionality for Mass Delete

5.0 Sending Permission Forms

To use online forms, the School user and student contacts add the **Task** widget to their user account home screen. The school user can then initiate the form from the task widget on the home screen at school view, and the Student contact(s) can respond via their home screen task widget. A short video describing the action is available on the MyEducationBC.info site with the fundamentals guide.

5.1 Enable Task Widget on Home Screen – Staff view

1. Login as School User
2. Click on your name on the top right of the screen
3. Click **Set Preference** option
4. Click **Home** tab
5. Select **Tasks** check box and
6. Click **Ok**

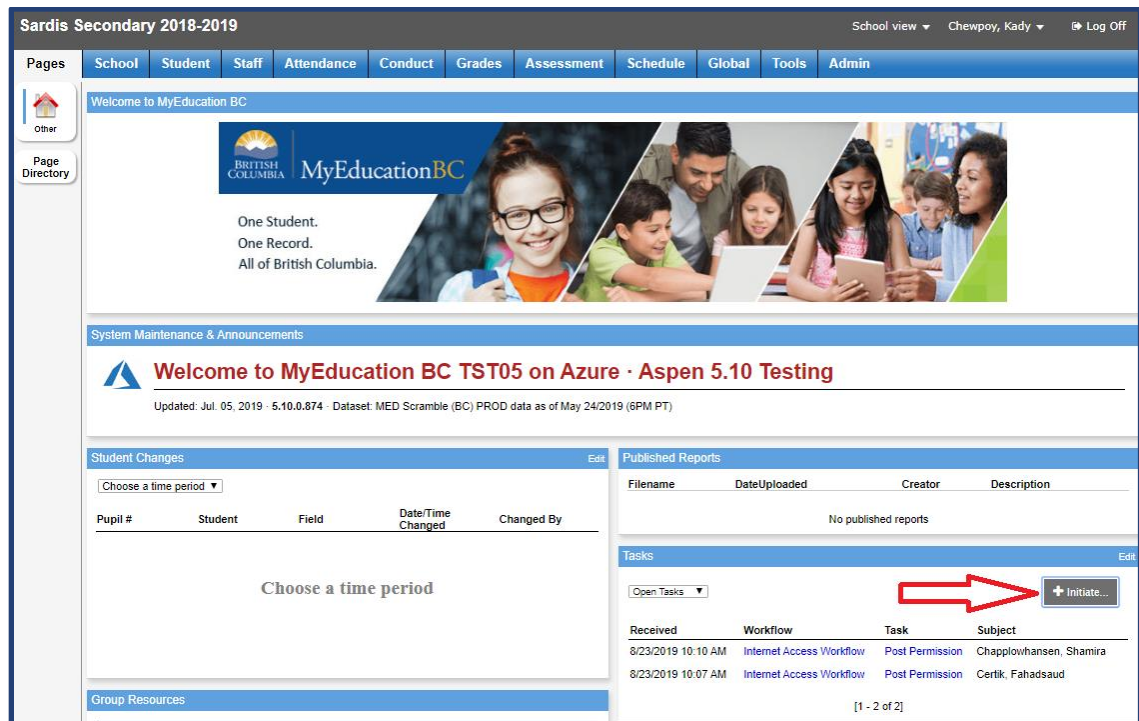


5.2 Initiate Workflow from School View:

Once the Task widget is in place, the School user can initiate the forms workflow:

School view > Pages top Tab

1. Click the **Initiate** button in the *Task widget* on the home page



The screenshot shows the 'Sardis Secondary 2018-2019' interface in 'School view'. The 'Tasks' section contains a table with the following data:

Received	Workflow	Task	Subject
8/23/2019 10:10 AM	Internet Access Workflow	Post Permission	Chaplowhansen, Shamira
8/23/2019 10:07 AM	Internet Access Workflow	Post Permission	Certik, Fahadsaud

In the parameter screen:

1. Select one of the following six workflows from the workflow dropdown (District or School will display depending on the District forms setup):
 - BC Student Permission – District/School Email & Auto Dialer
 - BC Student Permission – District/School Field Trip
 - BC Student Permission – District/School Internet Access
 - BC Student Permission – District/School PAC
 - BC Student Permission – District/School Release of Photo
 - BC Student Permission – District/School Walk from Home
2. Chose the **Selected** radio button from student selection section of the parameter screen (**Note: Snapshot option is not used for now**)
3. Select students using checkboxes and click **OK**
4. Click **Next** and review the number of students selected
5. Click **Finish**

MyEducation BC: Initiate Workflow - Google Chrome

Not secure | tst05.canadacentral.cloudapp.azure.com/as

Initiate Workflow: Workflow Selection

Workflow

Permission Workflow

Start Date

10/1/2019

Student Selection

☐ Selected
☐ Snapshot

Selected: 0

← Previous

Next →

Student Pick List - Google Chrome

Not secure | tst05.canadacentral.cloudapp.azure.com/asp/pickList.do?multi=true...

1:Aarbo, Lanni

Select All 0 of 1402 selected

Search on Name

<input type="checkbox"/>	Name	YOG	Homeroom
<input type="checkbox"/>	Aarbo, Lanni	2019	28
<input type="checkbox"/>	Abaroamartinez, Vandita	2021	72
<input type="checkbox"/>	Abdelmouty, Lekshmipriya	2023	211
<input type="checkbox"/>	Abdollahijan, Dongnan	2020	11
<input type="checkbox"/>	Abdulbaasit, Lilyagathamylbby	2021	41
<input type="checkbox"/>	Abdulrazzaq, Theda	2019	81
<input type="checkbox"/>	Abeysekara, Dejalise	2021	41
<input type="checkbox"/>	Abolghasemtehrani, Michaeldonavan	2020	98
<input type="checkbox"/>	Abolmaesumi, Finch	2021	04
<input type="checkbox"/>	Abusharar, Nicolaus	2020	38

☒ OK
 ☐ Cancel

Once the pop up is finished, the form workflow is sent by the school user to the student contact(s), the contacts will receive a task link in their family portal.

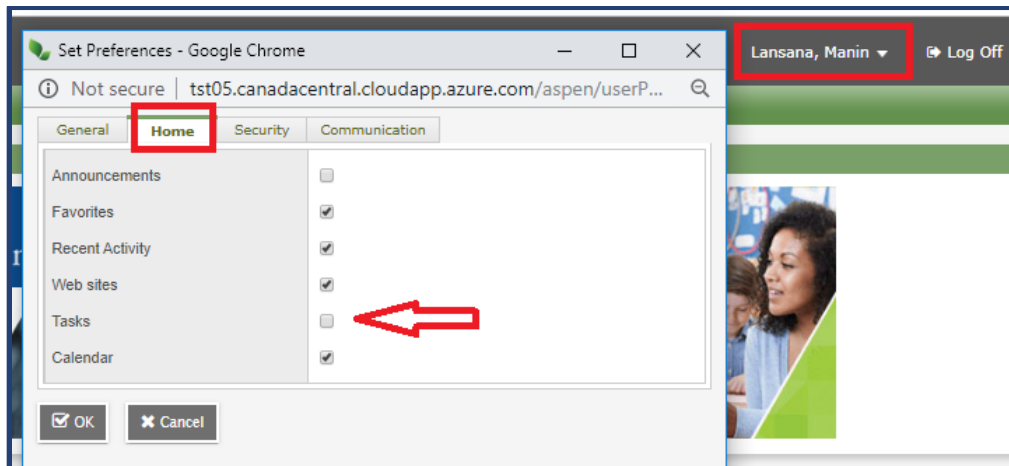
6.0 Respond to Workflow from the Family Portal

To use online forms, the student contact (Family Portal user) adds the **Task** widget to their user account home screen. The student contact can then respond the form from the task widget on the home screen. A short video describing the action is available on the MyEducationBC.info site with the fundamentals guide.

6.1 Enable Task Widget on Home Screen

Log into MYEDBC Family Portal:

1. Click on your name on the top right of the screen
2. Click **Set Preference** option
3. Click **Home** tab
4. Select **Tasks** check box and
5. Click **Ok**



6.2 Open the Form Workflow in the Family Portal:

Once the Task widget is enabled, the student contact will see available form permission tasks in their Task widget

1. Click the **task name** in the task widget
2. Review the student details and click **Next**
3. Review the Custom text and all the information on the form
4. Select "**Yes**" or "**No**" from **permission** dropdown
5. Click **Finish**

Outcome Details - Google Chrome

Not secure | tst05.canadacentral.cloudapp.azure.com/aspn/portletOutcomeEntry.do?valid...

BC Student Permissions: Completed Step 2 of 2

Subject: Abdolahi, Cihoe
Received: 10/17/2019 9:12 AM
Initiated By: Dabi, Khuongminhdang

District Text

you newsletters, school or district updates but some emails may be viewed as a commercial electronic message (e.g. information about buying a school yearbook, book fairs, hot meals or field trips that cost money) or similar events and offers. Any offers or advertising via email will be directly related to the school's/district's operations. Your email will not be disclosed to anyone beyond the school, district, or parent advisory councils for business or commercial purposes. To ensure compliance with this legislation we are requesting your consent in writing. Please return the completed consent form to your school principal.

Yes - I GIVE MY CONSENT to Walk to Home to my child for purposes consistent with the above .

No - I DO NOT CONSENT to Walk to Home to my child for purposes not consistent with the above .

Please select one of the following.

Permission to Walk Home? * **No**

← Previous Next → **Finish** Cancel

10 Testing

DateUploaded	Creator	Description
No published reports		

Edik

Workflow	Task	Subject
BC Student Permissions	Receive Permission	Abdolahi, Cihoe

+ Initiate...

The task will be sent to all student contact(s) who have:

- Portal access for the specified student
- The **BC Student Permission (District/School) –Student Contacts** security role

Once the contact completes the form and clicks **Finish** the form is submitted to the school and the task is removed from the *Task widget* for all of the student's contacts.

7.0 Changing Contact's Answer Post Workflow

If the student contact wishes to change their response, they contact the school directly.

The school can then decide if they want to change the appropriate indicator in the *Student Details > Permissions* sub top tab, or resend the form to the student contacts through the online form functionality.

8.0 Enterprise Online Forms

A set of Enterprise Forms Workflows available for Districts to use with Online Permission Forms. The Reference Tables for these forms can be customized as outlined in the section 'Setting up Custom Text for the Forms' and are found in the following locations:

District view > Admin top tab > Data Dictionary side > Reference leaf

School view > Admin top tab > Reference side tab

- **BC Student Permission – Walk from Home - District**
 - Custom District Text
 - Custom Text Responses:
 - Yes
 - No
- **BC Student Permission – Field Trip – District**
 - Custom District Text
 - Custom Text Responses:
 - Yes
 - No
- **BC Student Permission – Release of Photo – District**
 - Custom District Text
 - Custom Text Responses:
 - Yes
 - No
- **BC Student Permission – Email & Autodialer Calls – District**
 - Custom District Text
 - Custom Text Responses:
 - Yes
 - No
- **BC Student Permission – Internet Access**
 - Custom District Text
 - Custom Text Responses:
 - Yes
 - No
- **BC Student Permission – Release Info to PAC – District**
 - Custom District Text
 - Custom Text Responses:
 - Yes
 - No

9.0 BC Student Permission Audit Report

Schools and Districts will use the BC Student Permission Audit Report to track incoming and historical permission responses from the parent portal.

The report provides detail on the selected permission (e.g. BC Student Permission – School Field Trip), one row per student and identifies both the staff member creating the permission workflow and the student contact receiving the permission workflow. The report includes the following fields:

- Student Name
- Staff Name
- Staff User ID
- Date and Time - the permission workflow was initiated by the staff member
- Student Contact Name
- Student Contact User ID
- Date and time - the permission workflow was actioned by the student contact

Bulkley Valley

Smithers Secondary

BC Student Permission Audit

BC Student Permissions - School Field Trip

Page 1

May 21, 2020

Student Name	Staff (Person who sends the form)			Contact (Person who completes the form)			Form Status
	Name	Id	Date & Time	Name	Id	Date & Time	
Acuin, Yuksel	Aryali, Ilya	clerical	2020-05-21 08:02:18	Sonika, Yichin	Parent54	2020-05-21 08:03:24	Completed
Chaster, Weisheng	Bowyerbrar, Maryhannah	Mbow	2020-05-21 09:24:26				Sent

The report is found here in the following locations:

School view or District view > Student top tab > Report > BC Student Permission Audit Report

In the parameter pop up screen enter the fields below as needed:

Field	Default Value	Comment
School	Current School	Multiple Schools are available from the District view
Workflow	Blank	Select the permission workflow from the pop up list
Students to Include	All	Select: All, Current Selection or Snapshot
Search value	n/a	Field is available when Snapshot is selected above, enter snapshot name

Field	Default Value	Comment
Workflow status	All	Select: All or Completed by Student Contact
Start Date	Calendar year start date	Select the beginning date for the records included in the report
End Date	Current Date	Select the end date for the records included in the report
Format	PDF	Select: PDF, HTML, XLS or CSV

9.1.1 Change History for Specific Student

School View>Student Top Tab>Click into student>Permission Sub Top Tab>Options>Change History

Pages
School
Student
Staff
Attendance
Conduct
Grades
Assessment
Schedule
Extracurriculars
Global
Tools
Admin

Student List :: 10 - Abate, Shenna

Details
Contacts
Attendance
Conduct
Transcript
Assessments
Academics
Schedule

Change History for 10 - Abate, Shenna

All Records

User > Name	Change type	Time stamp	Field	Previous Value	Changed Value	Reason	Comment
Iwaschuk, Miryar	Modify	11/06/2020 9:12 AM	Send Email & Autodialer Calls?	Yes	No		
Elaati, Kylemikaela	Modify	11/06/2020 8:40 AM	Send Email & Autodialer Calls?	No	Yes		
Iwaschuk, Miryar	Modify	10/06/2020 11:40 AM	Send Email & Autodialer Calls?	Yes	No		
Elaati, Kylemikaela	Modify	10/06/2020 11:28 AM	Send Email & Autodialer Calls?	No	Yes		
Elaati, Kylemikaela	Modify	08/06/2020 12:15 PM	Send Email & Autodialer Calls?	Yes	No		

Close