

Permission

Chilliwack School District
Admin User Guide

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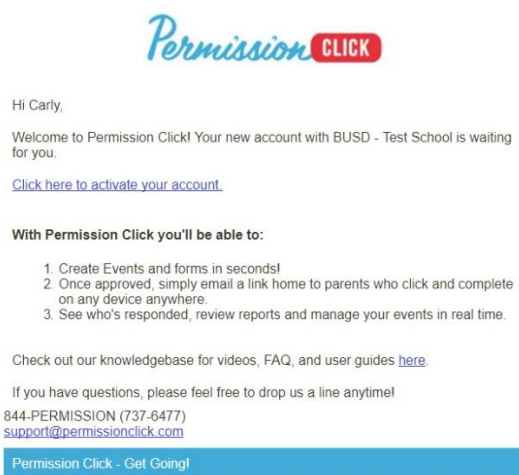
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Logging into your Account

1. Activating your Account

You should have received an email from Permission Click with the subject line: Activate your Permission Click Account. From the email, click on the link that says: “Click here to activate your account”



Next, enter your work email address and password, click I accept the privacy policy, and then click “Activate”

Activate Your Account

*Enter Account Email

*Set Password

*Confirm Password

Password must be between 8 and 50 characters, contains at least 1 number or special character, and cannot contain the word "password".

I accept the privacy policy and terms of service

[View privacy policy and terms of service](#)

Activate

Note: Once you have activated your account, you may use the Microsoft Sign-In Button on the Login Page

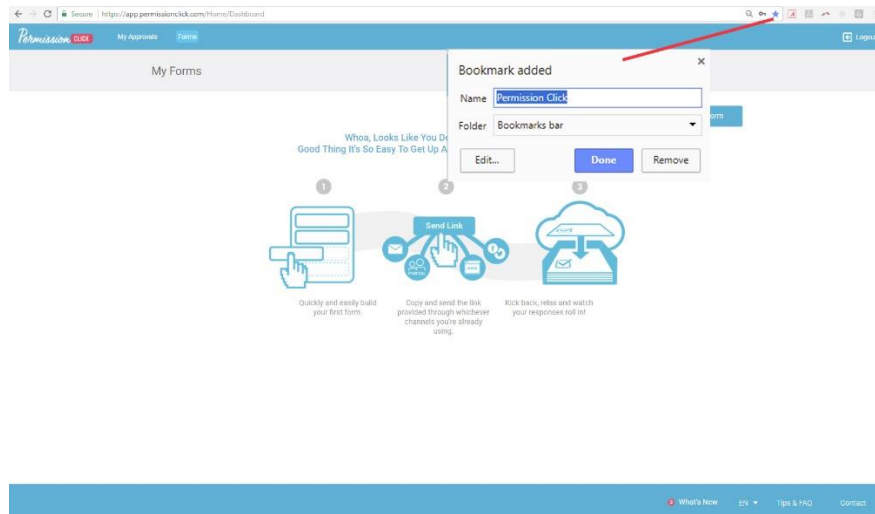
2. Creating a Bookmark

To make it easier for you to access your account next time, you can create a Bookmark and add the Permission Click login page to your Favourites. Start by navigating to the login page at:

<https://auth.permissionclick.com/login>

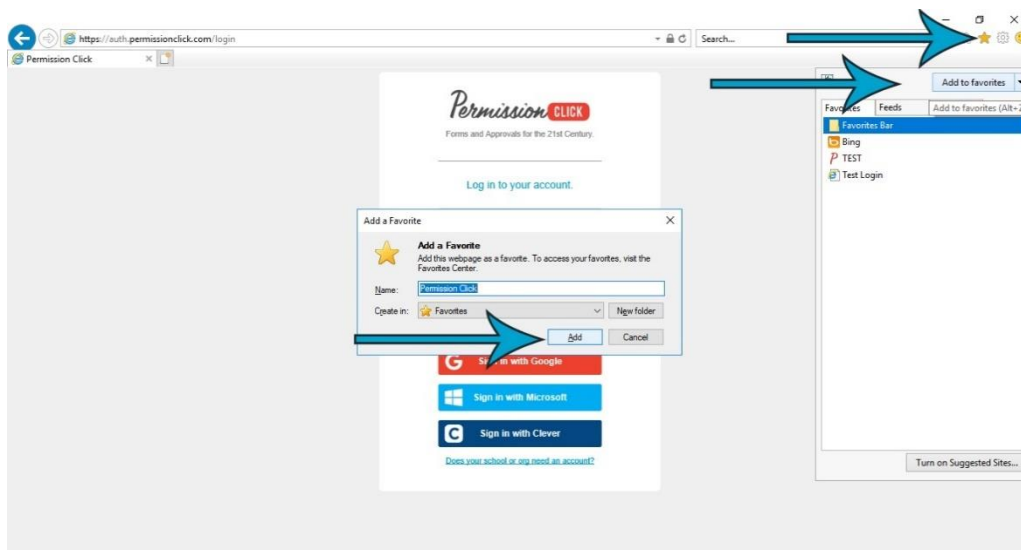
Chrome:

Click on the Star Icon in the address bar, enter a name for the Bookmark and then click Done



Internet Explorer:

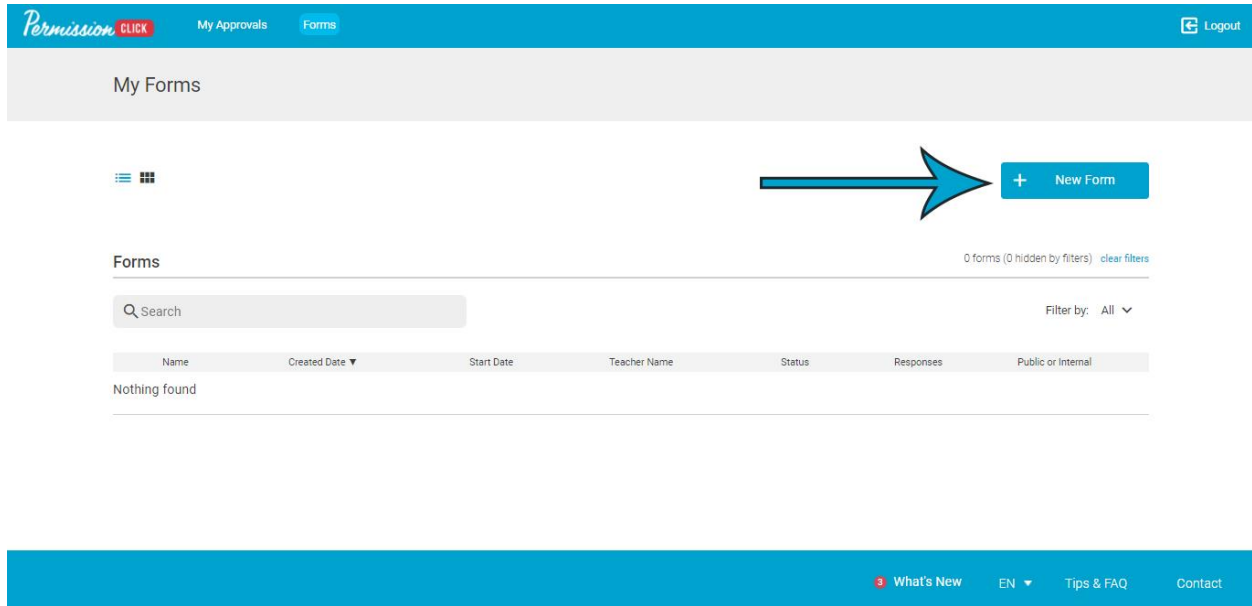
Click on the Star Icon next to the address bar, then click on Add to favourites. Enter a Name and click Add.



Building Forms

1. Building Your First Form – Tech AUA, Internet Use & Consent

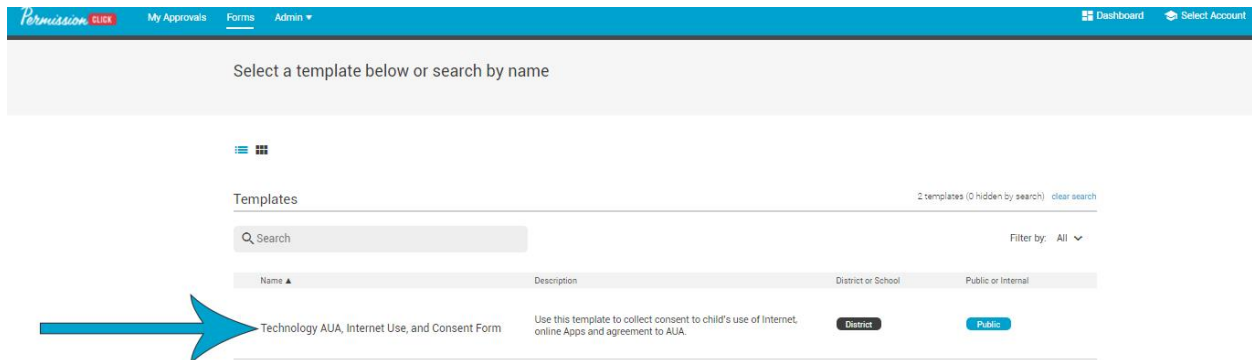
Once you have logged in, you will be on the Forms page. To create a form, click on the New Form button.



There are 3 ways to build a form:

1. Build Custom Form: Select this option to build a form entirely from scratch
2. Build from Template: Select this option to build a form from a pre-made template
3. Copy From Past: Select this option to copy an existing form

For your first form, select the Template: Technology AUA, Internet Use, and Consent Form



Forms have 4 Sections:

1. General Information – Form Name, Form Information, Dates
2. Questions for Parents
3. Questions about each Child
4. Form Email Notifications & Options

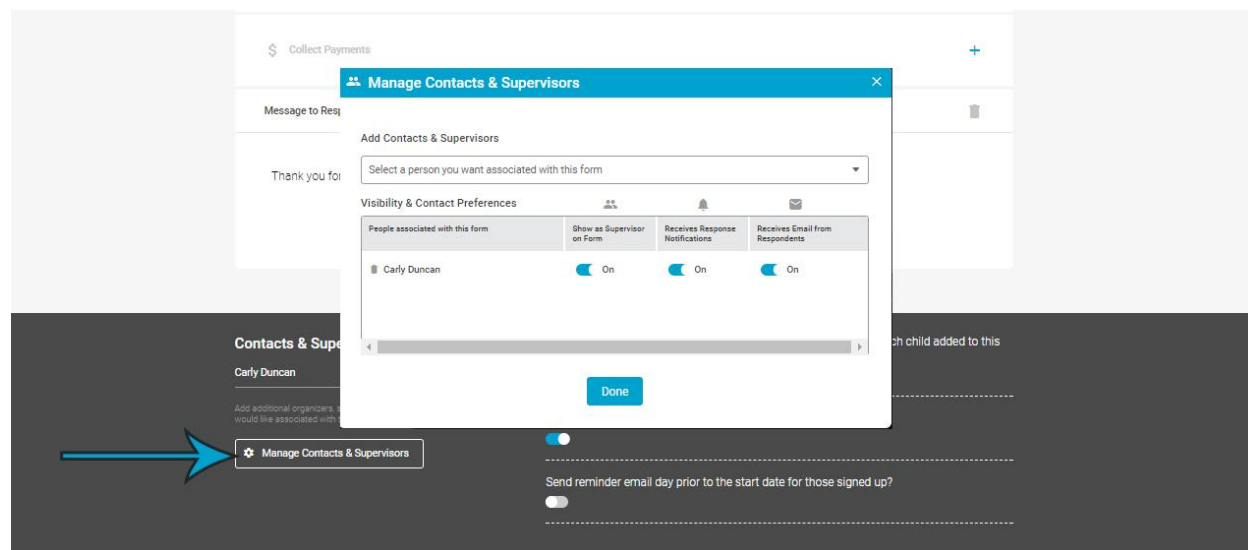
Because this is a template, the first 3 sections have been built for you! This means you do not need to edit the first 3 sections.

2. Form Email Notifications & Options

Contacts and Supervisors

You can add additional users from within your school to your form. Anyone that you add to the form will have access to the form and responses, optionally appear as a Supervisor on the form, as well as receive email notifications when parents have completed the form.

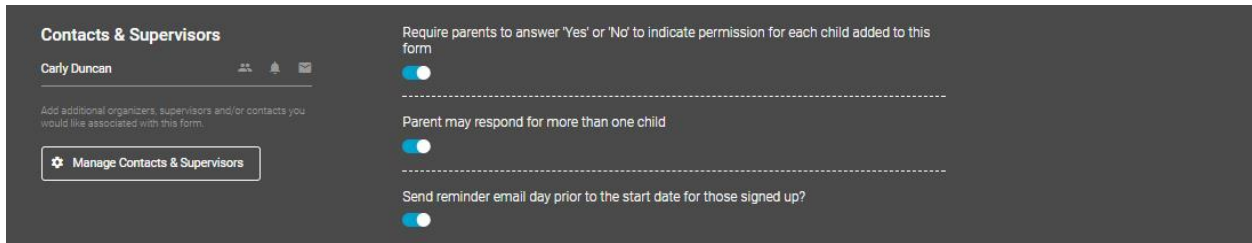
To add additional supervisors to your form, click on Manage Contacts & Supervisors, and then select the user from the drop down.



You can also toggle on/off the following options:

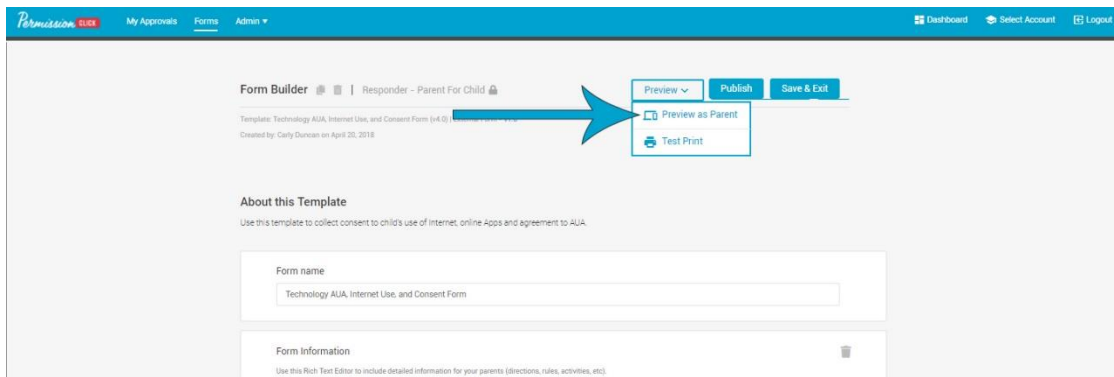
1. Parents may respond for more than one child. This is enabled by default. Disable this if you want parents to fill out a separate form for every child.
2. Require parents to answer 'Yes' or 'No' to indicate permission to attend for each child added onto this form. This is enabled by default. **Disable this option for this template, as the purpose of this form is not to give permission to attend an event.**

3. Send Reminder Email day prior to the start date for those signed up. This is disabled by default. Enable this if you want an email reminder to be sent to all parents who have completed the form. **Good for Field Trips!**



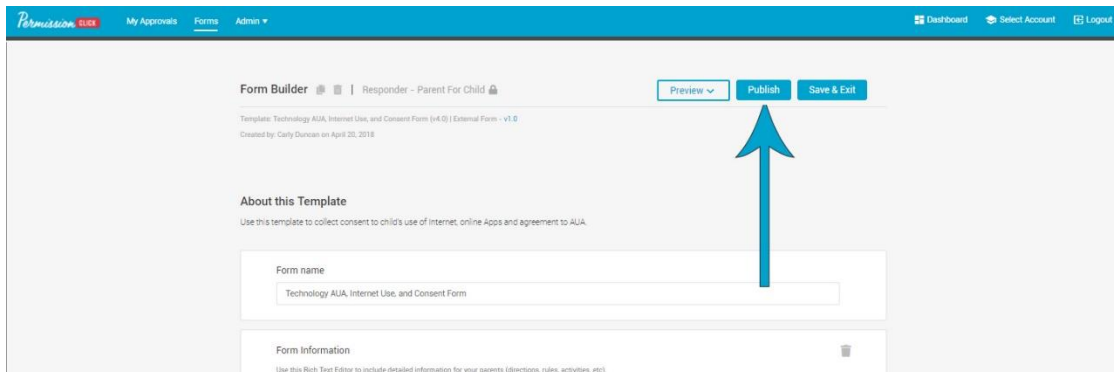
Before you send your form to parents, it is always a good idea to **Preview** the form to ensure everything is set up correctly.

To preview the form, click on the Preview button in the top right corner, and click “Preview as Parent”



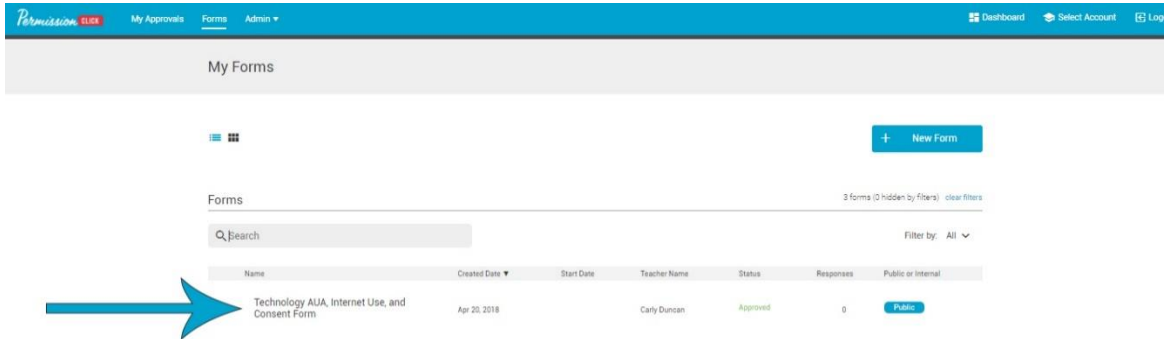
The form will open in a separate window, and you are able to go through the form as though you are a parent. Your response will not be recorded.

Once you are satisfied with your form, click Publish in the top right corner.



3. Emailing your Form to Parents

After your form is published, a link is generated that you will copy/paste into your email that will be sent out to parents. To copy the link, access the Form Manager by clicking on it from your My Forms list.



From the Form Manager screen, click the Copy button to copy the link you will email to parents.



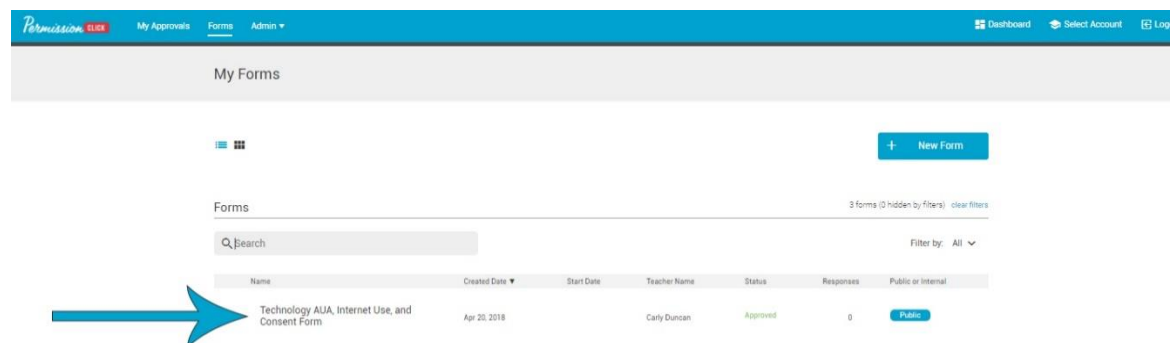
Notes about Links:

- Links must be pasted into the email. Use Ctrl+V or right click, and select “Paste”
- Links are case sensitive
- Links are active if the Form has not been archived, and/or it has not passed the respond by cut off date

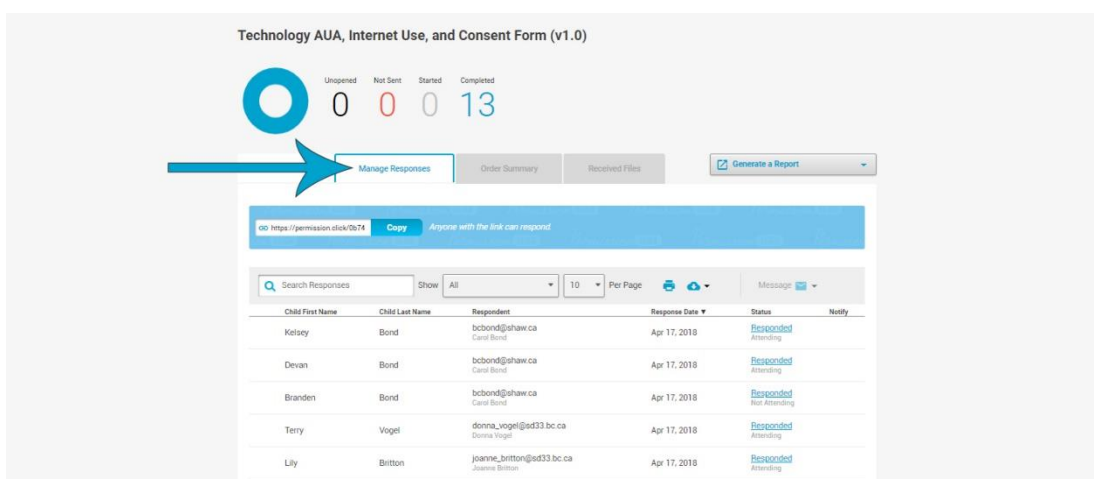
Managing Forms & Responses

1. Managing Responses from Parents

You can see parents who have completed your form from the Form Manager screen. All responses are recorded on the Manage Responses tab. To access the Manage Responses screen, click on your Form from My Forms:



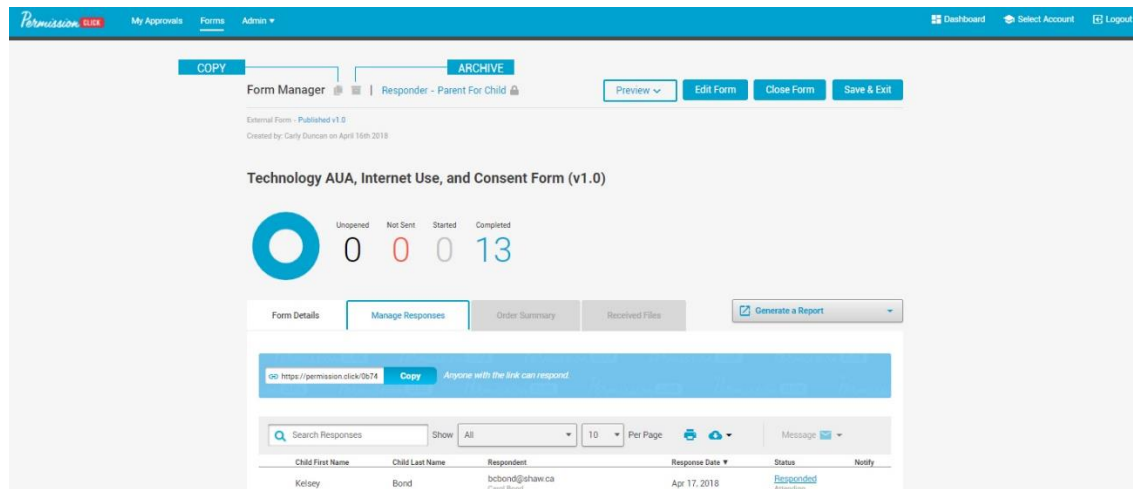
The Manage Response window allows you to see the Child's First & Last Name, and whether they will be attending, as well as the Parent's Name and Email address.



Notes about Responses:

- You can sort the data alphabetically by clicking on any of the Column Headers
- View more responses by changing the number that is displayed per page (default is 10)
- Search for responses by typing in the parent or child first name in the Search Box
- Delete a response by hovering your mouse over the name and clicking the red "X"
- View response details by clicking on the Responded link in the Status column

2. Copying, Archiving and Closing Forms



Copying a Form

You can make an identical copy of an existing form by clicking the [...] from the Form Manager and clicking “Make a Copy”. This will create a duplicate of your form, saving you time from having to fill out a new template.

Archiving a Form

Archiving a Form will remove it from your My Forms screen. Respondents will not be able to submit a response. When they click the link, they will be directed to a page stating that the Form is no longer available. You can view Archived forms by filtering for “Archived” from the My Forms page. You can unarchive a form by clicking on the form and then clicking “unarchive”.

Delete a Form

You can only delete forms that has not received any responses. To delete a form, click on the form to access the Form Manager and click on the [...] icon in the top right corner, and click Delete. You cannot recover a deleted form.

Running Reports

1. Master Response List

The Master Response List Report will show you the details of every response your form has received. The report is emailed to you as an Excel file. You can run this report from the Form Manager screen, and then clicking Generate a Report.

2. Responses by Student

The Responses by Student Report will show the First and Last name of each child that your form has received a response for. The report opens in a new window. You can run this report from the Form Manager screen, and then clicking Generate a Report.

The screenshot shows the 'Form Manager' interface for a form titled 'Responder - Parent For Child'. The form is 'External Form - Published v1.0' and was created by Carly Duncan on April 16th 2018. The form title is 'Technology AUA, Internet Use, and Consent Form (v1.0)'. A progress indicator shows 0 Unopened, 0 Not Sent, 0 Started, and 13 Completed responses. The 'Manage Responses' tab is active, and the 'Generate a Report' dropdown menu is open, showing options for 'Email Master Response List' and 'Display Responses By Student'. A blue arrow points to the 'Generate a Report' dropdown. Below the dropdown is a search bar and a table of responses.

Child First Name	Child Last Name	Respondent	Response Date	Status	Notify
Kelsey	Bond	bcbond@shaw.ca Carol Bond	Apr 17, 2018	Responded	Attending

Managing Users

1. User Roles & Permissions

There are 3 User Roles that you will use in your schools account:

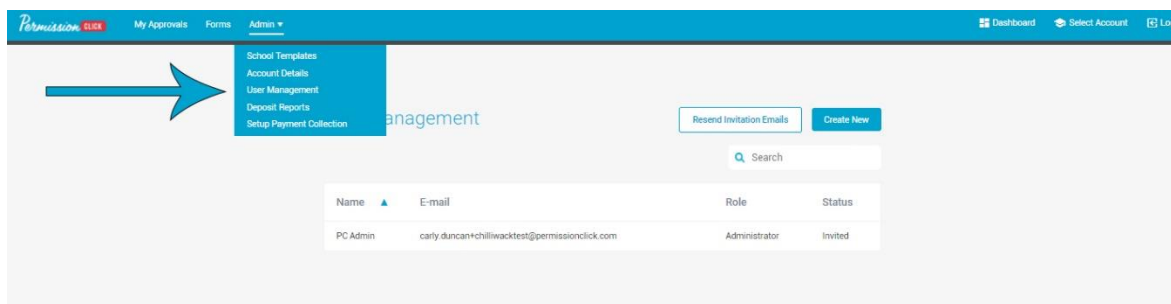
Principal: Principals can approve & reject forms and view all forms as well as manage users. Principals do not receive email notifications for approvals.

Administrator: Administrators can approve & reject forms and view all forms as well as manage users. Administrators receive all email notifications for forms that require approval.

Teacher: Teachers can create new forms and send them for approval. They can only view forms that they have created.

2. Add, Edit, and Deleting Users

You can Add, Edit, and Delete Users from the User Management page. To access this page, click on Admin, and then User Management



Add User: Click on Create School User button at the bottom of the list. After creating a user, they will be sent an Activation email where they can set their password and activate their account.

Edit User: Click on the name of the user you wish to edit, make your changes, and then click Submit

Delete User: Click on the name of the user you wish to delete and click Delete

Additional Support and Resources

Help Center

Our [Help Center](#) has articles, instructions and videos to help you navigate Permission Click. Quickly and easily search for the answers that you need.

Live Chat

Chat with our Customer Success Team for real time support. Click “Contact” in the bottom right corner of any screen in Permission Click to ask a question.

Email & Contact

Reach out with questions to support@permissionclick.com or by calling us toll free at 1-844-PERMISSION (1-844-737-6477)

FAQ

[How do I change my Permission Click password?](#)

[How do I add or remove users from my account?](#)

[What if an invited user can't find their invitation email?](#)

[How do I edit my live form?](#)