



Establish Connection

- 1 Download your free copy of the [Paperless Data Collection Tool \(DCT\)](#)
- 2 Make sure you are logged into your Google Drive
- 3 Click the following link: https://docs.google.com/forms/d/1kZnFmf2zMn7uBn-kdVm811XF_cVofb9GcmkX7yjils/copy
 - a. This is the ODR form
- 4 Click on "Make a Copy"
- 5 Click on the "Responses" (top of form)
- 6 Click on the green Spreadsheet Icon
- 7 Select "Create New Spreadsheet"
- 8 Click "Create"
- 9 This spreadsheet will store confidential student information! Make sure to save the spreadsheet into a password Protected Google Drive; Limit sharing of this google spreadsheet on a "need to know" basis!
- 10 In the spreadsheet you just created, click on "File"
- 11 Click on "Share"
- 12 Click on "Publish to Web"
- 13 Click on the Downward pointing arrow next to "Web Page" and then click on "Comma-Separated Values (.csv)"
- 14 Click on the "Publish" button, then click "OK"
- 15 Copy the URL hyperlink that appears
- 16 In the Paperless DCT excel spreadsheet, click on the "Data" tab on the menu ribbon
- 17 Click "Queries & Connections" in the "Queries and Connections" section of the data menu.
- 18 A side menu will open with three queries; Click on the "DataPull" query
- 19 In the box that reads "Current Value" paste over the existing url with the url you just copied from the google sheet that you just created and published
- 20 Click "Close and Load" in upper left of menu ribbon
- 21 In the Google Form you just made, click on the "Send" button
- 22 Click the link icon
- 23 Copy the URL hyperlink that appears
- 24 Go to the Main Menu Page of this excel spreadsheet
- 25 Right Click on the "Enter Referral" button
- 26 Click on "Link" and paste the url for the Google form in the space next to "Address:"
- 27 Click "OK"
 - a. You will also share this hyperlink with staff for writing ODRs
- 28 Go to your google sheet
- 29 Click on "Share"
- 30 Click on "Copy Link"
- 31 On the main menu of the Paperless DCT, right click on "View Referrals"
- 32 Click "Link"

- 33 Paste the link to the google sheet in the box next to "Address:"
- 34 Click "OK"



Optional: Email Confirmation

- 1 Create two Google folders in a password protected Google Drive; Label one "ODRs" and the other "Resolved ODRs"
- 2 Click on the following link
https://docs.google.com/document/d/1nC9WjaoxsWeEvYK5prLtTf8cRGkEr6kX_HVd7Z2Z3z_M/copy
- 3 Click "Make Copy"
 - a. This is the template for the ODR that will be filled in and emailed to staff and the administrator on submit
- 4 Open the Google Sheet where the ODR form dumps into
- 5 Click on "Extensions" on the menu ribbon
- 6 Mouse over "Add ons" then click on "Get Add on"
- 7 Search for Autocrat
- 8 Click on Autocrat
- 9 Click on Install
- 10 On your Google Sheet, Click Extensions and click on Autocrat
- 11 Click on "Launch"
- 12 Click on "New Job"
- 13 **Step 1 Name your merge job:** Name the Job "ODR Notification"
- 14 Click Next
- 15 **Step 2: Choose Template** click search and search for "ODR Template"
- 16 Click on "Use" to the left of "ODR Template" (It may say "Copy of ODR Template")
- 17 Click "Next"
- 18 **Step 3 Map Source to Template:** scroll down through the list and make sure that none of the text boxes in the column at the right are blank. If they are, use the drop down menu in the text box to select
 - a. The middle column that contains items with <<>> around them are the tags in the template that the column headers in the google sheet maps to;
 - b. The right hand column refers to the column headers in your google sheet.
- 19 Click Next
- 20 **Step 4 File settings:** Name the file name "ODR for <<Student Number>> on <<Date of Incident>> at <<Time>>"
- 21 For "Type" select "PDF"
- 22 Leave radial dial on "multiple output mode (classic mode)"

- 23 Select "Next"
- 24 **Step 5 Choose destination folder(s):** select the "ODR" folder you just created
- 25 Click "Next"
- 26 **Step 6 Add dynamic folder reference (optional):** click "Next" without doing anything else
- 27 **Step 7 Set merge condition (optional):** click "add condition"; Leave this at "Time Stamp equals Not Null"
- 28 Click Next
- 29 **Step 8 Share Docs & Send Emails:** click "Yes" next to "Share Doc"
- 30 Leave "allow Collaborators to Reshare" marked as Yes; this will allow the admin to forward to the referring staff member
- 31 Leave "Send from Generic No reply Email" marked "No"
- 32 In the "To" enter <<Your Email Address>>
- 33 In the subject line, copy and paste the following: "Notification of incident for <<Student Number>> on <<Date of Incident>> at <<Time>>"
- 34 In the body of the email, copy and paste the following: "Student Incident Report
CONFIDENTIAL"
- 35 Click "Next"
- 36 **Step 9 Add/remove job triggers:** mark "Yes"; Leave "Run on Time Trigger" Marked "No"
- 37 Click Save

ODR Resolution Email Notification

- 1 Launch Autocrat (if you closed it before)
- 2 Click "New Job"
- 3 **Step 1 Name your merge job:** Name the New Job "ODR Resolution"
- 4 Click "Next"
- 5 **Step 2 Choose Template:** click search and search for "ODR Template"
- 6 Click on "Use" to the left of "ODR Template" (It may say "Copy of ODR Template")
- 7 Click "Next"
- 8 **Step 3 Map source data to template:** "Map Source to Template" page, scroll down through the list and make sure that none of the text boxes in the column at the right are blank. If they are, use the dropdown menu in the text box to select
- 9 Click Next
- 10 **Step 4 File settings:** Name the file name "Resolution of ODR for <<Student Number>> on <<Date of Incident>> at <<Time>>"
- 11 For "Type" select "PDF"
- 12 Leave radial dial on "multiple output mode (classic mode)"
- 13 Select "Next"
- 14 **Step 5 Choose destination folder(s):** select the "ODR" folder you just created (you may have to use the search feature)
- 15 Click "Next"
- 16 **Step 6. Add dynamic folder reference (optional):** click "Next" without doing anything else
- 17 **Step 7 Set merge condition (optional):** click "add condition";

- 18 Use the dropdown arrows to change "Timestamp" to "Administrative Decision"; Leave the condition set as "Not Null"
- 19 Click Next
- 20 **Step 8 Share Docs & Send Emails:** Share Docs & Send Emails" click "Yes" next to "Share Doc"
- 21 Leave "allow Collaborators to Reshare" marked as Yes
- 22 Leave "Send from Generic No reply Email marked "No"
- 23 In the "To" paste "<<Your Email Address>>"
- 24 In the subject line, copy and paste the following: "Notification of resolution of ODR for <<Student Number>> on <<Date of Incident>> at <<Time>>"
- 25 In the body of the email, copy and paste the following: "Student Incident Report
CONFIDENTIAL"
- 26 Click "Next"
- 27 **Step 9 Add/remove job triggers:** Leave "Run on Form Trigger" marked no, and mark "Run on Time Trigger" marked "Yes"
- 28 Click Save

Links

- 1 [Paperless Data Collection Tool](#)
- 2 [Forced Copy Google ODR Form](#)
- 3 [Forced Copy ODR Template for Emails](#)