

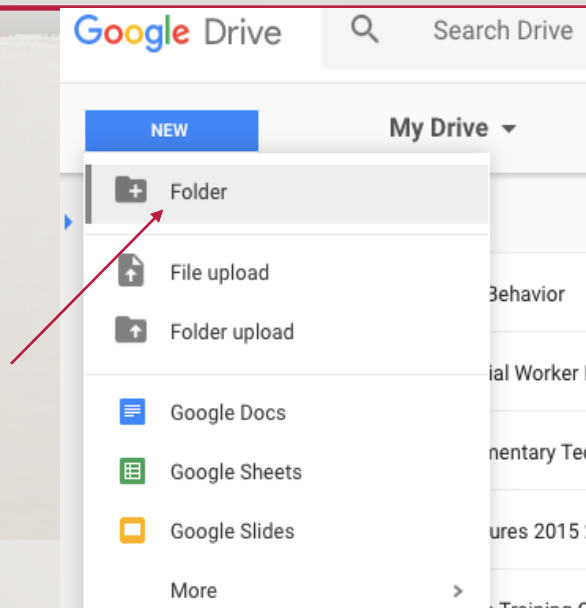
USING GOOGLE APPS (NOW G SUITE) AND AUTOCRAT TO STREAMLINE SCHOOL TO HOME COMMUNICATION

KELLY LODER AND CHRIS LAUDO

PEQUEA VALLEY SCHOOL DISTRICT

STEP 1

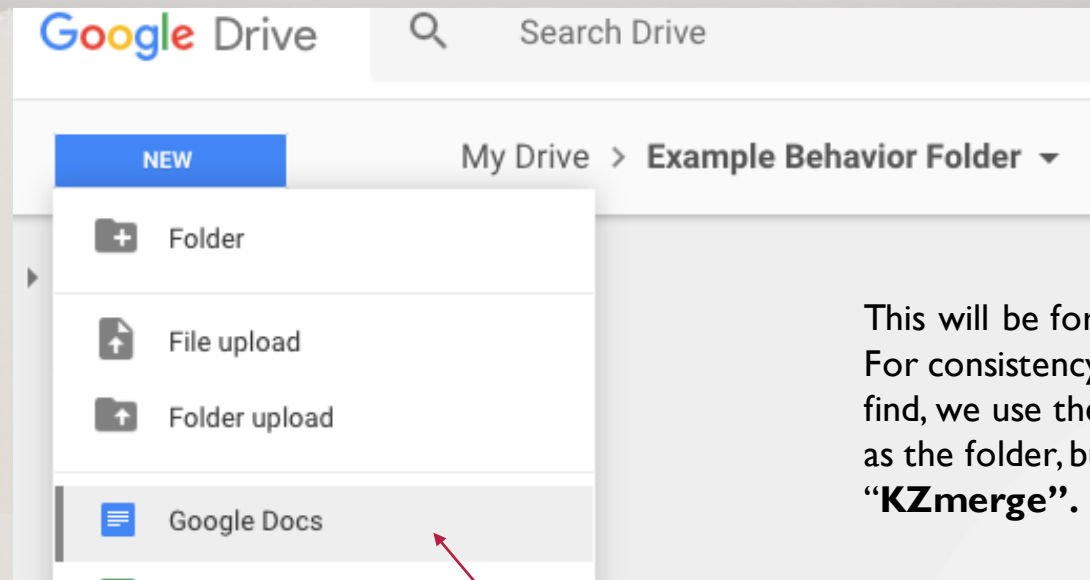
IN DRIVE, CREATE A NEW FOLDER



We prefer to name the new folder with two student initials and then behavior. Such as **KZbehavior**.

STEP 2

OPEN UP THE NEW FOLDER AND ADD A NEW DOCUMENT



This will be for the merge document. For consistency and to make it easy to find, we use the same naming system as the folder, but in this case it will be **“KZmerge”**.

THIS NEW DOCUMENT WILL BE YOUR **MERGE** DOCUMENT- YOU CAN BASE IT UPON YOUR PAPER FORM

THE PAPER FORM ONLY HAS TO SURVIVE UNTIL THE END OF THE DAY

Ken's Good Choices	Participation	Completing Classwork	Taking healthy steps to handle frustration
Date _____			
Homeroom			
Rtll			
Block 1			
Block 2			
Recess			
Block 3			
Block 4			
Specials			
Dismissal			
Point Totals			

Total points for the day _____/50

Points for each time block
2 points= Active participant. Classwork completed. No reminder needed to take calming steps if frustrated.
1 point= Participated for minimum of 50% of the lesson. Classwork attempted but not completed. Reminder given to take calming steps if frustrated.
0 points= Not participating. Work avoided/not being completed. Not taking steps to calm self even after being reminded.

Notes:

THE MERGE DOCUMENT WILL BECOME A PARENT-FRIENDLY LETTER

Dear Parent,

Here is a summary of how Kenny did today with his chart.

Points for each time block
2 points= Active participant. Classwork completed. No reminder needed to take calming steps if frustrated.
1 point= Participated for minimum of 50% of the lesson. Classwork attempted but not completed. Reminder given to take calming steps if frustrated.
0 points= Not participating. Work avoided/not being completed. Not taking steps to calm self even after being reminded.

Ken's Good Choices Date <<date>>	Participation	Completing Classwork	Taking healthy steps to handle frustration
Homeroom	<<Homework>>	<<Homework>>	<<Homework>>
Rtll	<<Rtllwork>>	<<Rtllwork>>	<<Rtllcool>>
Block 1	<<Block1part>>	<<Block1work>>	<<Block1cool>>
Block 2	<<Block2part>>	<<Block2work>>	<<Block2cool>>
Recess			<<Recesscool>>
Block 3	<<Block3part>>	<<Block3work>>	<<Block3cool>>
Block 4	<<Block4part>>	<<Block4work>>	<<Block4cool>>

The merge document at right was created by pasting an existing chart from a Word document. Parent-friendly wording was added at the top, along with the pasted explanation of points from the existing Word document. It does not truly become a **merge** document until you add the merge tags.

<<mergetag>>

The merge tags tell Google which places to put particular information from the chart. Note the naming pattern at right with the merge tags. Any information that can change from day to day needs to have a merge tag.

Dear Parent,

Here is a summary of how Kenny did today with his chart.

Points for each time block

2 points= Active participant. Classwork completed. No reminder needed to take calming steps if frustrated.

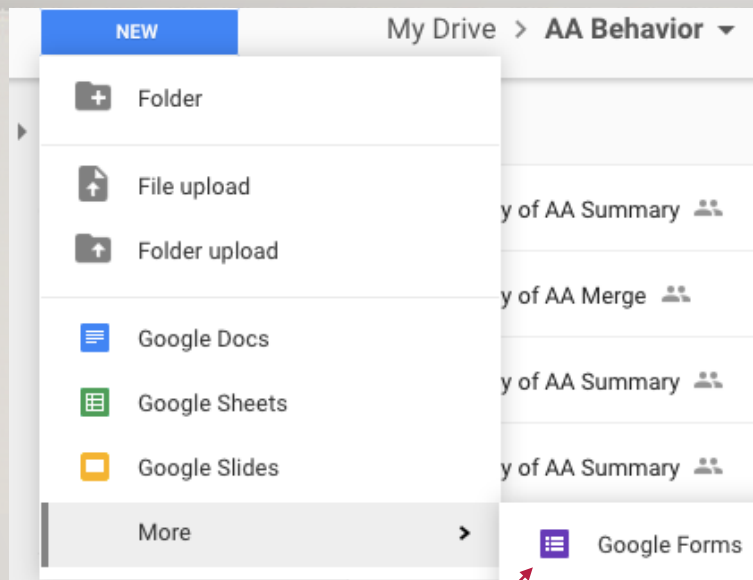
1 point= Participated for minimum of 50% of the lesson. Classwork attempted but not completed. Reminder given to take calming steps if frustrated.

0 points= Not participating. Work avoided/not being completed. Not taking steps to calm self even after being reminded.

Ken's Good Choices Date <<date>>	Participation	Completing Classwork	Taking healthy steps to handle frustration
Homeroom	<<Homepart>>	<<Homework>>	<<Homecool>>
RtII	<<RtIIpart>>	<<RtIIwork>>	<<RtIIcool>>
Block 1	<<Block1part>>	<<Block1work>>	<<Block1cool>>
Block 2	<<Block2part>>	<<Block2work>>	<<Block2cool>>
Recess			<<Recesscool>>
Block 3	<<Block3part>>	<<Block3work>>	<<Block3cool>>
Block 4	<<Block4part>>	<<Block4work>>	<<Block4cool>>

STEP 3

IN THE SAME FOLDER, ADD A NEW FORM



- This will be the online form that you will use to transfer information from the paper form at the end of the day. All questions will mirror what you have on the paper form.
- For consistency, we like to use the same naming system as previously mentioned, in this case, it would be “**KZsummary**”. The term summary is apt because it helps to describe the information that you will get over time.

FORMTASTIC!

- Starting your form with a short explanation is always helpful.
- We always like to ask for the current date first- To do that, click on the + symbol to add a new question and choose the **Date** option for question type.

QUESTIONS


RESPONSES

1

AA Summary

This form is to be completed at the end of each day in order to track Kenny's behavior progress as well as to keep parents informed of his progress. If it is a partial school day, such as early dismissal or late start, it is ok to leave certain time blocks blank.

What is today's date? *


Month, day, year 


Participation


Row 1. Homeroom	Column 1. 2
Row 2. RtII	Column 2. 1
Row 3. Block 1	Column 3. 0
Row 4. Block 2	

+

Tt

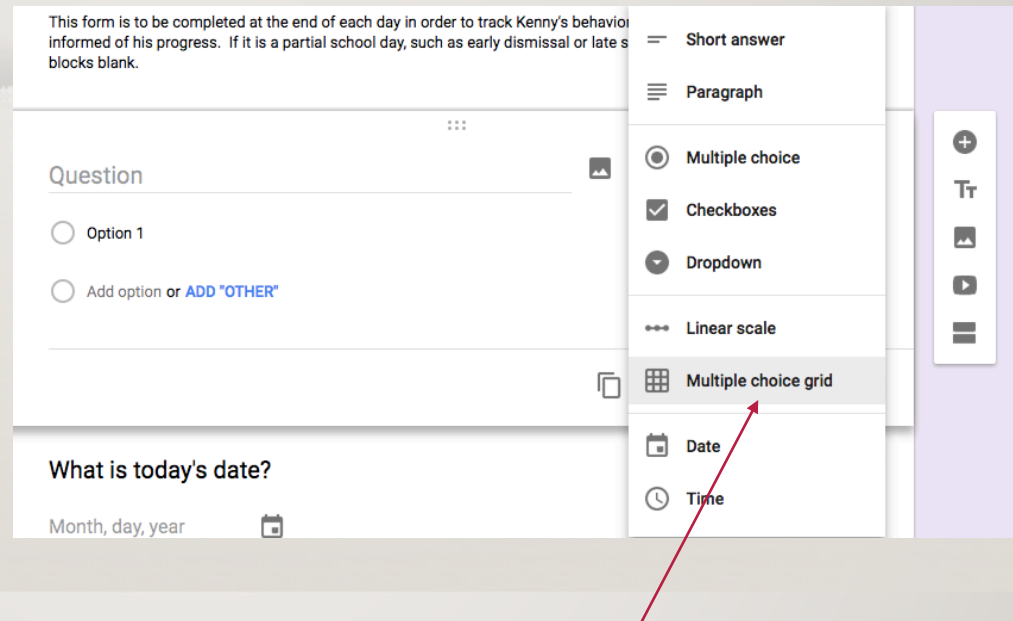






FORMTASTIC!

To convert from a grid-type paper chart to a Google Form is fairly easy. When you click the + symbol to add a new question, choose **Multiple Choice Grid** for your question type.




This form is to be completed at the end of each day in order to track Kenny's behavior informed of his progress. If it is a partial school day, such as early dismissal or late s blocks blank.

Question

☐ Option 1

☐ Add option or [ADD "OTHER"](#)

What is today's date?

Month, day, year 

Short answer

Paragraph

☐ Multiple choice

☒ Checkboxes

☐ Dropdown

☐ Linear scale

☒ Multiple choice grid

☐ Date

☐ Time

The screenshot shows the Google Forms editor interface. At the top, there is a text box with instructions. Below it is a question field labeled 'Question' with two radio button options: 'Option 1' and 'Add option or ADD "OTHER"'. To the right of the question field is a menu for selecting question types. The 'Multiple choice grid' option is highlighted, and a red arrow points to it from the bottom right. Below the question field is a preview of the question: 'What is today's date?' with a text input field and a calendar icon. On the far right, there is a vertical toolbar with icons for adding questions, text, images, videos, and sections.

FORMTASTIC!

Note how the time blocks from the paper chart now become Rows 1-8. The possible point values for each time block, 0-3, are placed in Columns 1-3. Doing this for each of the behavior goals then gives you the same information from your paper chart...almost.

Participation

Row 1. Homeroom

Column 1. 2

Row 2. RtII

Column 2. 1

Row 3. Block 1

Column 3. 0

Row 4. Block 2

Row 5. Block 3

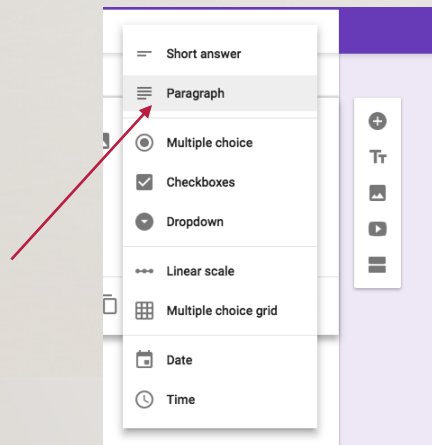
Row 6. Block 4

Row 7. Specials

Row 8. Dismissal

DON'T FORGET TO ADD A PLACE AT THE END OF THE FORM FOR COMMENTS

USE THE “PARAGRAPH” CHOICE WHEN YOU CREATE THE NEW QUESTION.



THIS THEN GIVES THE TEACHER PLENTY OF SPACE TO ADD ANY EXTRA COMMENTS. (YOU MIGHT WANT TO INCLUDE SOME TEXT TO REMIND THAT ANY COMMENTS BE STRICTLY FACT-BASED.)

A screenshot of a form with a 'Comments' section. The section is titled 'Comments' in bold. Below the title is a text input field with the placeholder text 'Long answer text'. The form has a light purple header and a light purple footer.

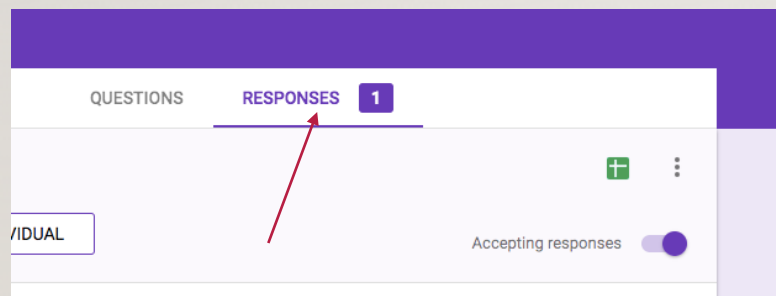
NOW IT'S TIME FOR THE FUN STUFF

Let's meet our new best friend, autoCrat.

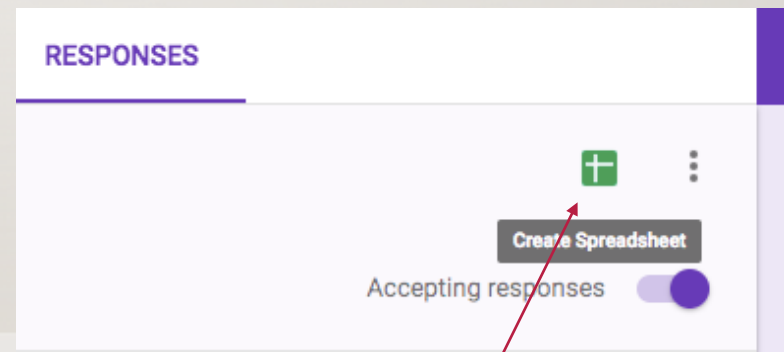


NEXT STEPS...

CLICK THE RESPONSES TAB



CLICK THE GREEN SPREADSHEETS SYMBOL



NEXT STEPS...

MAKE SURE THAT THE FIRST CHOICE IS PICKED AND CLICK “CREATE”

THE NEW SPREADSHEET LINKED TO THE FORM WILL NOW OPEN UP


Select response destination ×

☒ Create a new spreadsheet





Untitled form (Responses) [Learn More](#)

☐ Select existing spreadsheet

CANCEL CREATE

 **Example Form (Responses)** ☆ 📁


File Edit View Insert Format Data Tools Form Add-ons Help

\$ % .0 .00 123 ▾

Arial ▾

10 ▾

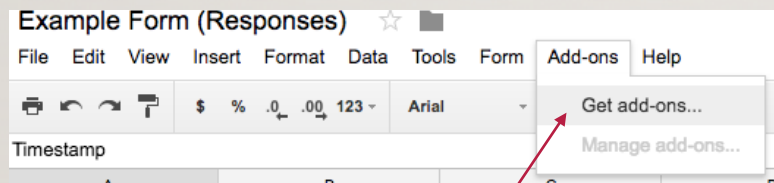
B 

fx

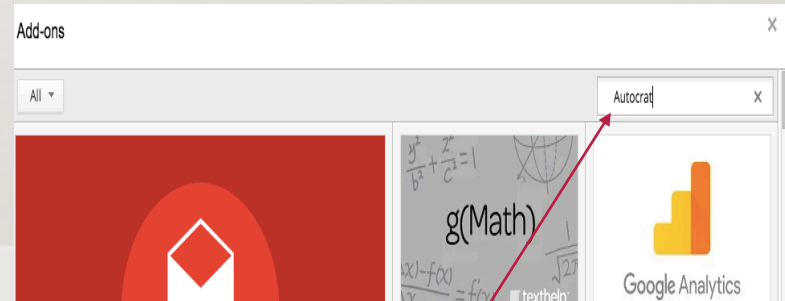
Timestamp

NEXT STEPS...

CLICK ON “ADD-ONS” AND
CHOOSE “GET ADD-ONS...”

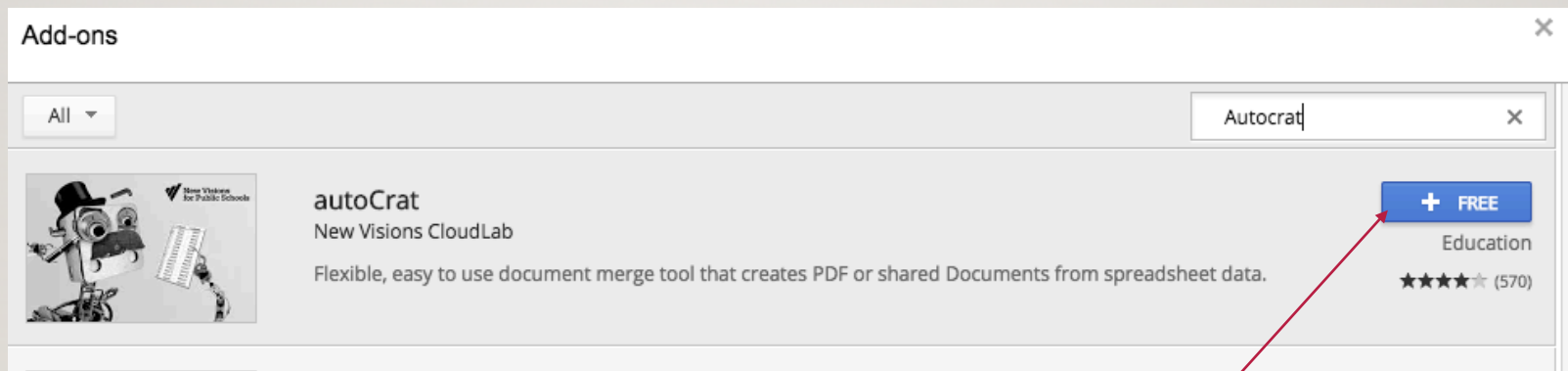


TYPE “AUTOCRAT” IN THE SEARCH
BOX

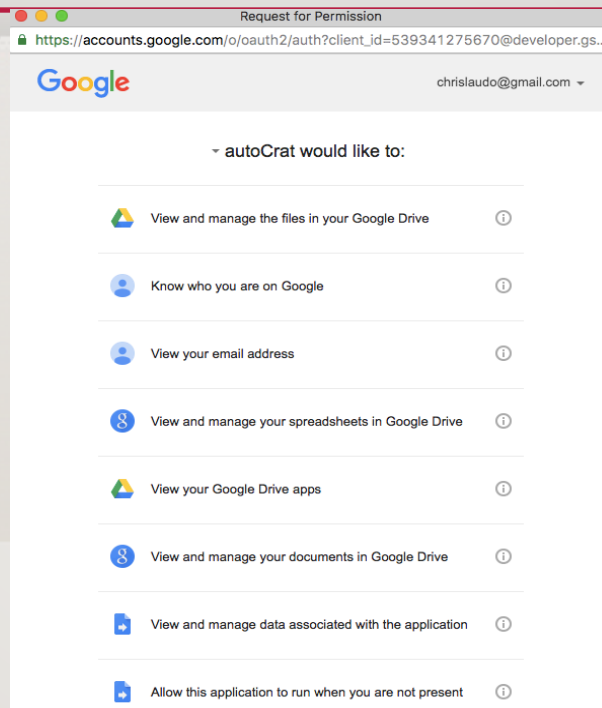


NEXT STEPS...









CLICK THE “+ FREE” BUTTON



AUTOCRAT WILL NOW ASK FOR PERMISSION TO DO THE MAGIC THAT IT DOES



SCROLL DOWN AND CLICK “ALLOW”

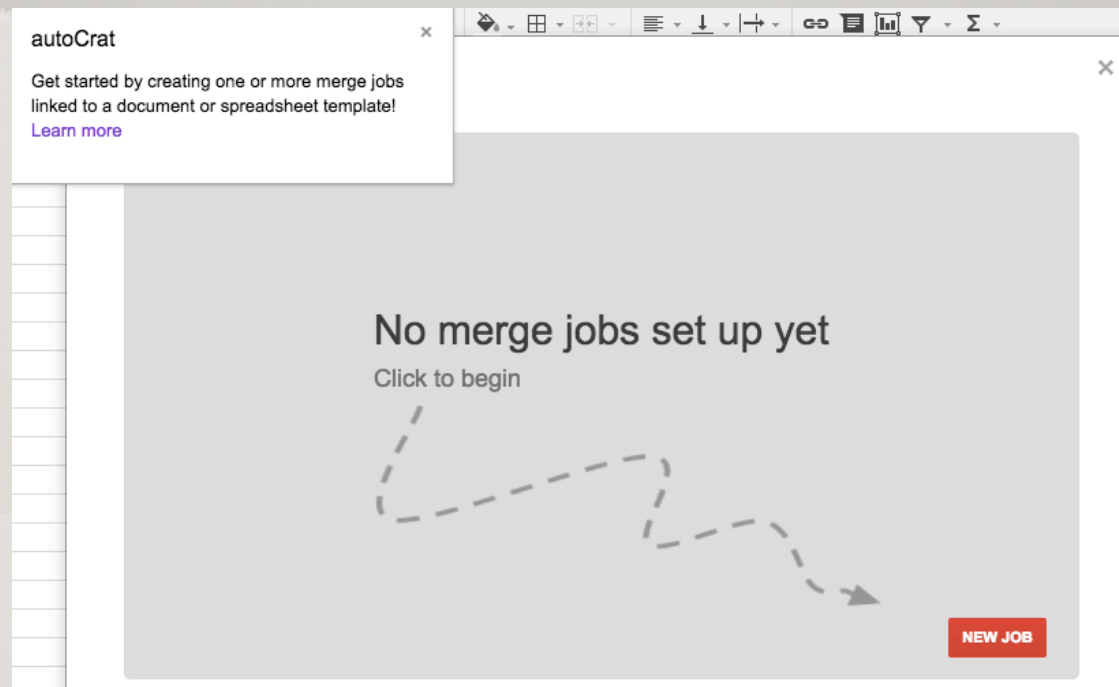
-  Send email as you 
-  Connect to an external service 
-  Publish this application as a web app or a service that may share your data 
-  View and manage your forms in Google Drive 

By clicking Allow, you allow this app and Google to use your information in accordance with their respective terms of service and privacy policies. You can change this and other [Account Permissions](#) at any time.

Deny

Allow

ONCE BACK IN THE SPREADSHEET,AUTOCRAT WILL ASK
YOU IF YOU WANT TO SET UP A NEW MERGE JOB



Go for it!

NAME YOUR MERGE JOB. WE SUGGEST STICKING WITH
A SIMILAR NAMING PATTERN TO THAT WHICH YOU
HAVE USED SO FAR, “KZ DAILY SUMMARY”

AutoCrat ×

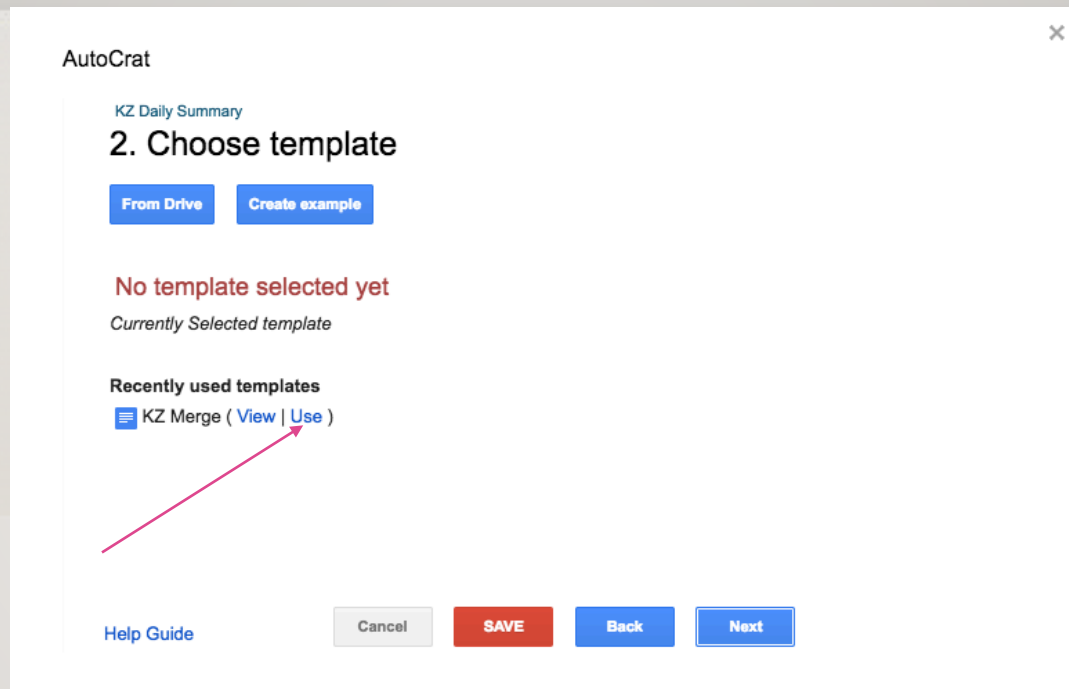
1. Name your merge job

Job Name

*Give your job a useful name for easy reference

[Help Guide](#)

THE “CHOOSE TEMPLATE” STEP LINKS YOUR MERGE DOCUMENT SO THAT AUTOCRAT CAN USE IT



NOW THAT YOUR MERGE DOCUMENT IS CHOSEN,
CLICK “NEXT”

AutoCrat ✕

KZ Daily Summary

2. Choose template

From Drive

Create example

☰ KZ Merge

Currently Selected template

Recently used templates

☰ KZ Merge ([View](#) | [Use](#))

[Help Guide](#)

Cancel

SAVE

Back

Next




NOW YOU WILL MAP THE MERGE TAGS TO PARTICULAR COLUMNS ON THE SPREADSHEET

AutoCrat ×

KZ Daily Summary

3. Map source data to template

Merge tab Header row First data row

<input type="text" value="Standard"/>	<< date >> 	maps to column	<input type="text"/>
<input type="text" value="Standard"/>	<< Homepart >> 	maps to column	<input type="text"/>
<input type="text" value="Standard"/>	<< Homework >> 	maps to column	<input type="text"/>

[Help Guide](#)

NOW YOU WILL MAP THE MERGE TAGS TO PARTICULAR COLUMNS ON THE SPREADSHEET

AutoCrat

KZ Daily Summary

3. Map source data to template

Merge tab Form Responses 1

Header row 1

First data row 2

Standard

<< date >>

maps to column

Standard

<< Homepart >>

maps to column

Standard

<< Homework >>

maps to column

Help Guide

Cancel

SAVE

Back

Next

Bookmarks People window Help

etclU1: X Aviation X autoCr X Nearpo X etclU1: X AA Beh X
spreadsheets/d/1Yz-VVW2QftKvvXAephMEn5wioRL5VW1r3QBed95c4U/edit#gid=
ceDirect Sapphire Gradeboo... School E-Mail 17579 Weather For... Import

Tools Form Add-ons Help Last edit was 22 minutes ago

Arial 10 B I A

AutoCrat

KZ Daily Summary

3. Map source data to template

Merge tab Form Responses 1

Header row 1

First data row 2

Standard

<< date >>

maps to column

Timestamp

What is today's date?

Participation [Homeroom]

Participation [RtII]

Participation [Block 1]

Participation [Block 2]

Participation [Block 3]

Participation [Block 4]

Participation [Specials]

Participation [Dismissal]

Completing Classwork [Homeroom]

Completing Classwork [RtII]

Completing Classwork [Block 1]

Completing Classwork [Block 2]

Completing Classwork [Block 3]

Completing Classwork [Block 4]

Completing Classwork [Specials]

Completing Classwork [Dismissal]

Taking Healthy Steps to Handle Frustration [Homeroom]

Taking Healthy Steps to Handle Frustration [RtII]

Taking Healthy Steps to Handle Frustration [Block 1]

Taking Healthy Steps to Handle Frustration [Block 2]

Taking Healthy Steps to Handle Frustration [Block 3]

Taking Healthy Steps to Handle Frustration [Block 4]

Taking Healthy Steps to Handle Frustration [Specials]

Taking Healthy Steps to Handle Frustration [Dismissal]

Comments

CONTINUE TO MAP THE MERGE TAGS TO PARTICULAR COLUMNS ON THE SPREADSHEET-YOU WILL HAVE TO SCROLL DOWN TO DO THIS

AutoCrat

KZ Daily Summary

25 unmapped tags!

3. Map source data to template

Merge tab: Form Responses 1 | Header row: 1 | First data row: 2

Standard | << date >> | maps to column: What is today's date?

Standard | << Homepart >> | maps to column: [Empty]

Standard | << Homework >> | maps to column: [Empty]

Cancel | SAVE | Back | Next

Help Guide

AutoCrat

KZ Daily Summary

3. Map source data to template

Merge tab: Form Responses 1 | Header row: 1 | First data row: 2

Standard | << date >> | maps to column: [Empty]

Standard | << Homepart >> | maps to column: [Empty]

Timestamp

What is today's date?

Participation [Homeroom]

Participation [Rtl]

Participation [Block 1]

Participation [Block 2]

Participation [Block 3]

Participation [Block 4]

Participation [Specials]

Participation [Dismissal]

Completing Classwork [Homeroom]

Completing Classwork [Rtl]

Completing Classwork [Block 1]

Completing Classwork [Block 2]

Completing Classwork [Block 3]

Completing Classwork [Block 4]

Completing Classwork [Specials]

Completing Classwork [Dismissal]

Taking Healthy Steps to Handle Frustration [Homeroom]

Taking Healthy Steps to Handle Frustration [Rtl]

Taking Healthy Steps to Handle Frustration [Block 1]

Taking Healthy Steps to Handle Frustration [Block 2]

Taking Healthy Steps to Handle Frustration [Recess]

Taking Healthy Steps to Handle Frustration [Block 3]

Taking Healthy Steps to Handle Frustration [Block 4]

Taking Healthy Steps to Handle Frustration [Specials]

Taking Healthy Steps to Handle Frustration [Dismissal]

Comments

ONCE YOU HAVE ALL OF THE MERGE TAGS MAPPED,
CLICK “NEXT”

AutoCrat ×

KZ Daily Summary

3. Map source data to template

	Column	
<input type="text" value="Standard"/>	<< Diswork >>	maps to column <input type="text" value="Completing Classwork [Dismis:]"/>
<input type="text" value="Standard"/>	<< Discool >>	maps to column <input type="text" value="Taking Healthy Steps to Handle"/>
<input type="text" value="Standard"/>	<< Comments >>	maps to column <input type="text" value="Comments"/>

[Help Guide](#)

NAME THE DOCUMENT THAT GETS CREATED EACH TIME
A FORM IS SUBMITTED, CHOOSE PDF FOR THE
DOCUMENT TYPE, UNDER “OUTPUT AS” CHOOSE
“MULTIPLE DOCUMENTS”

AutoCrat

KZ Daily Summary

4. File Settings

File Name

Daily Summary

*Tell AutoCrat how to name each file it creates. Use <<TAGS>> aligned to merge sheet column headers to merge in source data.

Type

Google documer

Output as

☒ Multiple documents (classic mode) ☐ Single document (new!)

[Help Guide](#)

Cancel

SAVE

Back

Next

AutoCrat

KZ Daily Summary

4. File Settings

File Name

Daily Summary

*Tell AutoCrat how to name each file it creates. Use <<TAGS>> aligned to merge sheet column headers to merge in source data.

Type

✓ Google document

PDF

Output as

☒ Multiple documents (classic mode) ☐ Single document (new!)

FOR “DESTINATION FOLDER” CHOOSE THE DRIVE FOLDER THAT YOU CREATED AT THE BEGINNING OF THIS PROCESS

AutoCrat

KZ Daily Summary

5. Choose destination folder(s)

+ Choose Folder

Folders



Social Worker R...



AA Behavior



KZ Behavior



Laptop Issue R...



Select

Cancel

EACH TIME A FORM IS SUBMITTED, A COPY OF THE PDF THAT IS CREATED WILL BE PLACED IN THIS FOLDER- GO AHEAD AND CLICK “NEXT”

AutoCrat

KZ Daily Summary

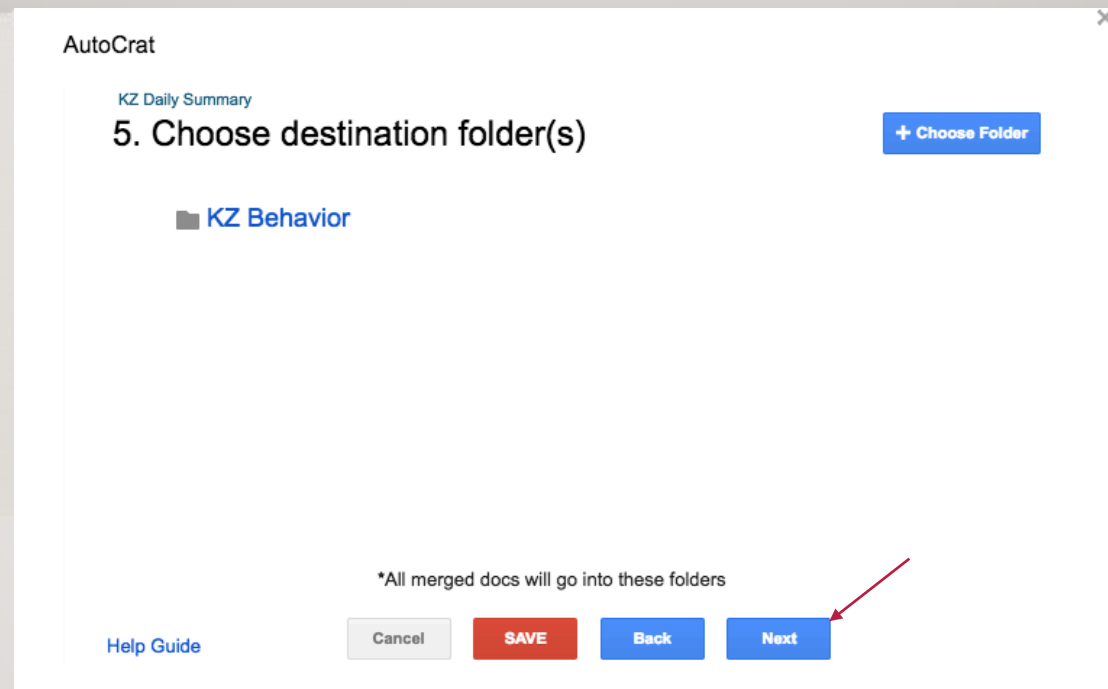
5. Choose destination folder(s)

+ Choose Folder

KZ Behavior

*All merged docs will go into these folders

Help Guide Cancel SAVE Back Next



FOR STEP 6, JUST CLICK “NEXT”

AutoCrat

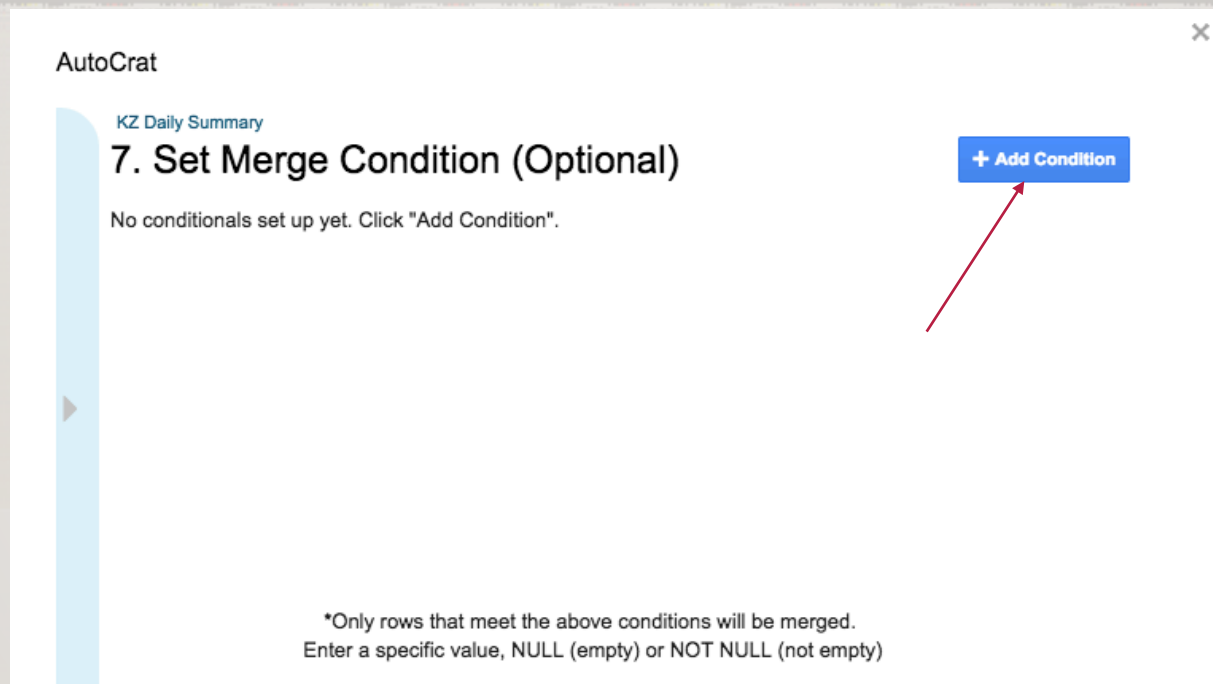
KZ Daily Summary

6. Add dynamic folder reference (optional) [+ Reference](#)

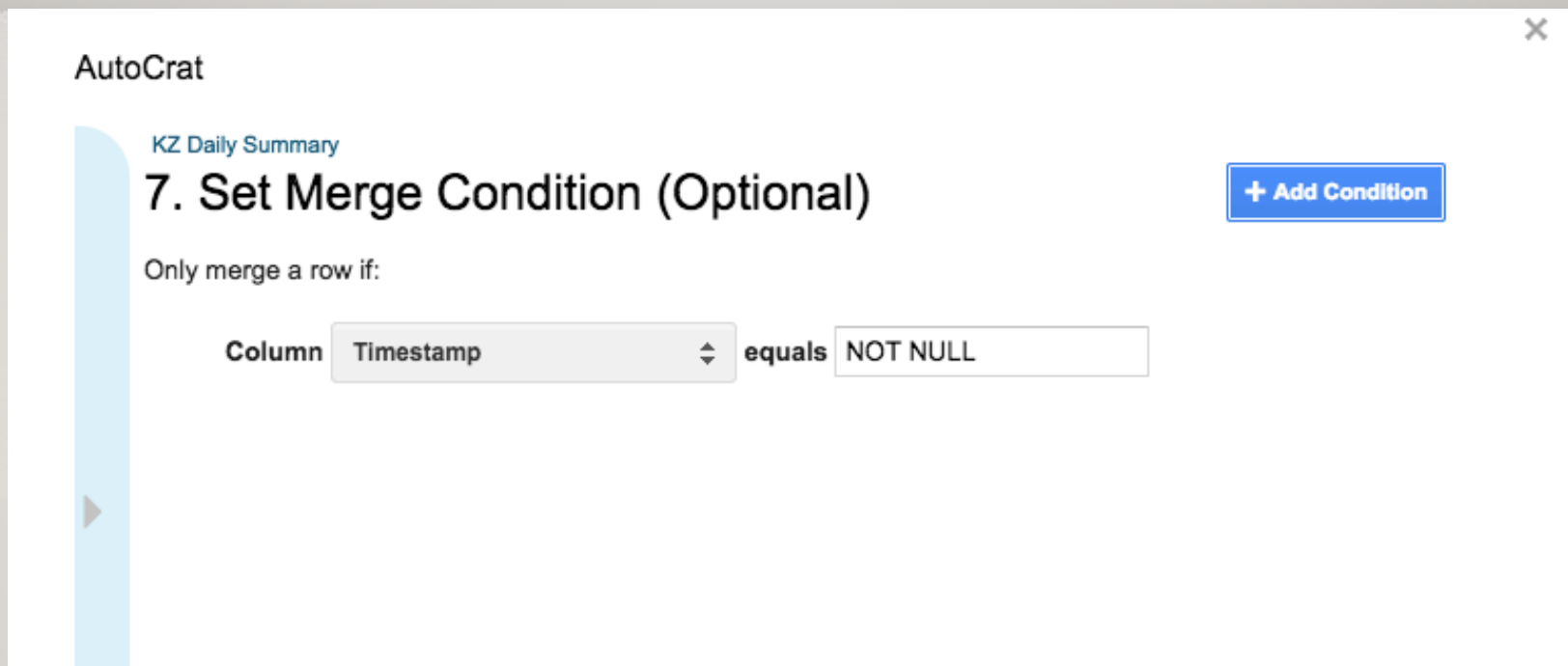
*Select a column that will contain a valid folder ID when this job runs

[Help Guide](#) [Cancel](#) [SAVE](#) [Back](#) [Next](#)

STEP 7 LETS AUTOCRAT KNOW WHEN TO RUN THE MERGE JOB- CLICK ON “ADD CONDITION”



MAKE SURE IT LOOKS LIKE THE IMAGE BELOW- THIS TELLS AUTOCRAT TO RUN THE MERGE EACH TIME A NEW FORM IS SUBMITTED



The screenshot shows the AutoCrat application window. At the top left, it says 'AutoCrat' with a close button (X) in the top right corner. Below the title bar, there's a blue sidebar on the left with a 'KZ Daily Summary' label and a blue arrow pointing right. The main content area has the heading '7. Set Merge Condition (Optional)' in bold black text. To the right of this heading is a blue button with a plus sign and the text '+ Add Condition'. Below the heading, it says 'Only merge a row if:'. Underneath this, there is a configuration row: 'Column' followed by a dropdown menu showing 'Timestamp', then the word 'equals', and finally a text input field containing 'NOT NULL'.

AutoCrat

KZ Daily Summary

7. Set Merge Condition (Optional)

+ Add Condition

Only merge a row if:

Column Timestamp equals NOT NULL

STEP 8 IS WHERE YOU GET TO SET UP HOW THE MERGE DOCUMENT IS SHARED

AutoCrat

KZ Daily Summary

8. Share docs & send emails

Share Doc?

☐ Yes ☒ No

Click on the Yes box

KZ Daily Summary

8. Share docs & send emails

Share Doc?

☒ Yes ☐ No

Share doc as

PDF

Allow collaborators to re-share

☐ No ☒ Yes

Send from generic no-reply address

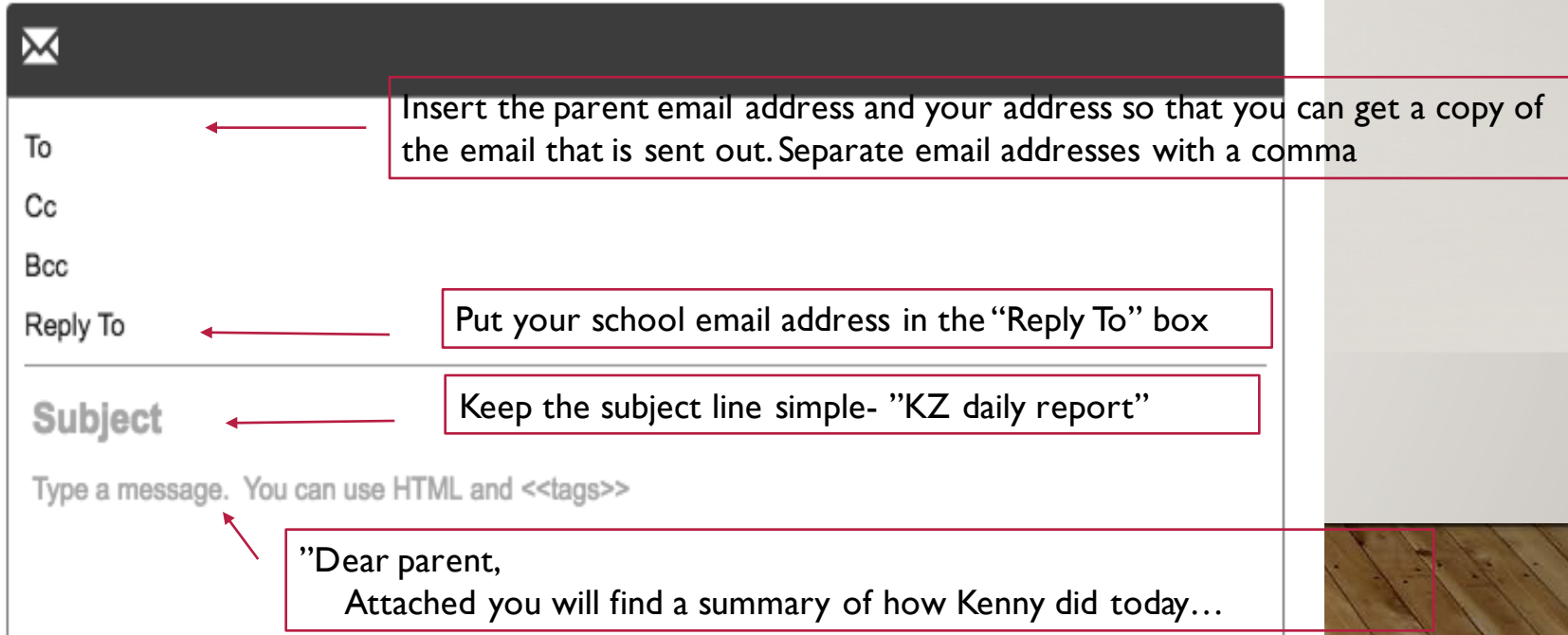
☒ No ☐ Yes

*Only available for Google Apps accounts, not Gmail users

STEP 8 IS WHERE YOU GET TO SET UP HOW THE MERGE DOCUMENT IS SHARED

8. Share docs & send emails

*Only available for Google Apps accounts, not Gmail users



The screenshot shows an email composition interface. At the top is a dark grey header with an envelope icon. Below it are fields for 'To', 'Cc', 'Bcc', and 'Reply To'. A red arrow points from a text box to the 'To' field. The text box says: 'Insert the parent email address and your address so that you can get a copy of the email that is sent out. Separate email addresses with a comma'. Below these fields is a horizontal line, followed by a 'Subject' field. A red arrow points from a text box to the 'Subject' field. The text box says: 'Keep the subject line simple- "KZ daily report"'. Below the subject field is a text area with the placeholder text 'Type a message. You can use HTML and <<tags>>'. A red arrow points from a text box to the text area. The text box says: '"Dear parent, Attached you will find a summary of how Kenny did today...".

ALMOST THERE! STEP 9 SIMPLY CONFIRMS WITH AUTOCRAT WHEN YOU WANT THE MERGE JOB TO RUN

AutoCrat

KZ Daily Summary

9. Add/remove job triggers

Run on form trigger

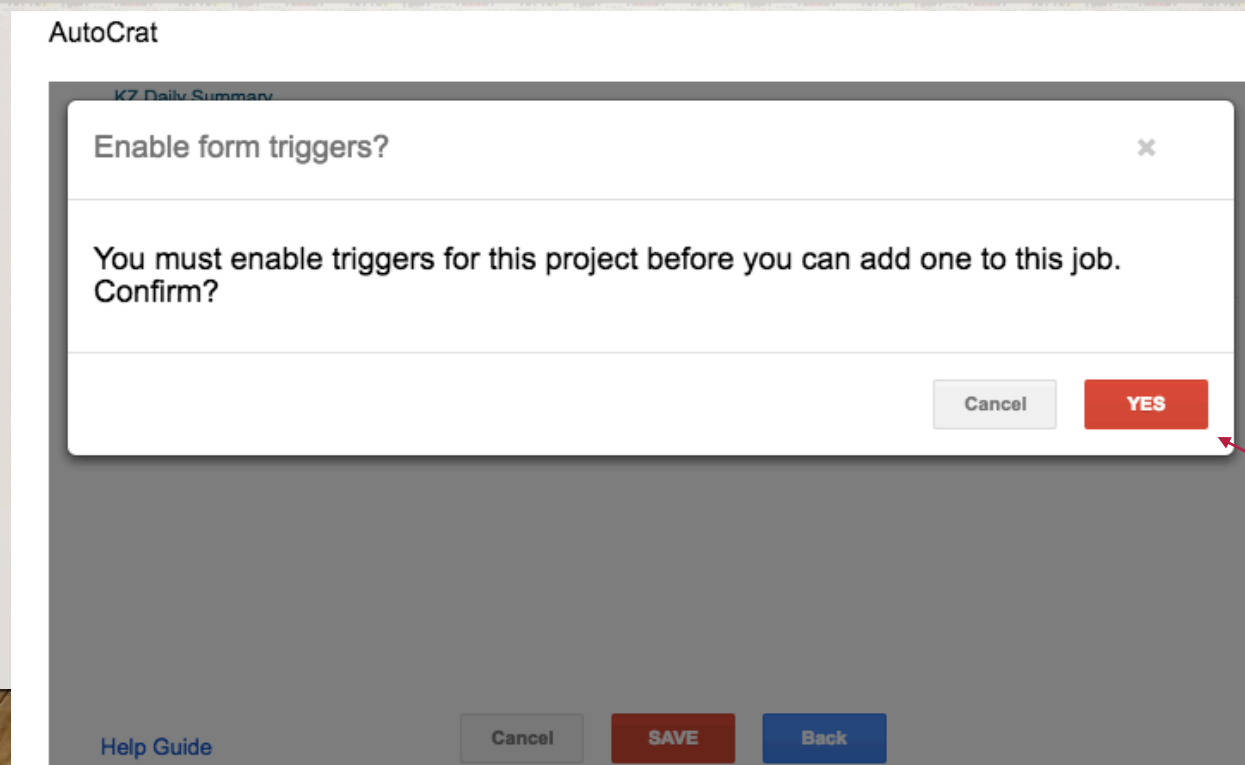
☐ Yes ☒ No

Run on time trigger

☐ Yes ☒ No

Click the “Yes”
option

AUTOCRAT WILL ASK YOU TO CONFIRM



THE FINISH LINE! GO AHEAD AND CLICK “SAVE”

AutoCrat

[KZ Daily Summary](#)

9. Add/remove job triggers

Run on form trigger

☒ Yes ☐ No

Run on time trigger

☐ Yes ☒ No

[Help Guide](#)

Cancel

SAVE

Back

REVIEW NOTE

AutoCrat

Existing Jobs

KZ Daily Summary



If you click on this choice, you can look at a summary of the merge settings.

A NOTE TO REMEMBER FOR WHEN YOU GO LIVE, IF YOU ARE THE ONE DOING THE FORM SUBMISSIONS, SEE BELOW

The screenshot shows a Google Forms interface for a form titled "KZ Summary". The top purple header bar contains the title "KZ Summary" and the status "All changes saved in Drive". On the right side of the header are three icons: a paw print, a live view icon (an eye with a dot in the center), and a settings gear icon. To the right of these icons is a white button labeled "SEND". Below the header, there are two tabs: "QUESTIONS" (which is active and underlined) and "RESPONSES" (which has a small grey box with the number "1" next to it). The main content area of the form is white and contains the following text:

KZ Summary

This form is to be completed at the end of each day in order to track Kenny's behavior progress as well as to keep parents informed of his progress. If it is a partial school day, such as early dismissal or late start, it is ok to leave certain time blocks blank.

What is today's date? *

Below the question, there is a text input field with the placeholder text "Month, day, year" and a calendar icon to its right.

A red arrow points from a callout box to the live view icon in the top right corner of the form interface.

Click to open up a window with the live form to do submissions.

IF YOU ARE HAVING OTHERS COMPLETE THE FORM, YOU CAN EMAIL THEM THE LINK TO THE FORM

The image shows a screenshot of a web application interface. On the left, there is a purple header bar with icons for a palette, an eye, and a gear, followed by a white button labeled 'SEND'. Below the header, a white box labeled 'RESPONSES' contains the number '1'. A red arrow points from a text box labeled 'Click here first' to the 'SEND' button. On the right, a purple modal titled 'Send form' is open, showing options to 'Collect usernames', 'Send via' (with icons for email, link, and code), and social media sharing (G+, f, t). The modal also has fields for 'Email', 'To', 'Subject', and 'Message', and a checkbox for 'Include form in email'.




SEND




RESPONSES 1

Click here first

Send form

☐ Collect usernames

Send via   

Email

To

Subject

Message

☐ Include form in email

ONCE YOU ARE AN AUTOCRAT MASTER, YOU WILL END UP FINDING OTHER USES FOR THIS TOOL

- Behavior forms, of course
- Applications for school clubs
- In-house forms
 - Referral to Student Support Team
 - Gifted Screening Referrals
 - Volunteer sign-ups

THIS TUTORIAL RESOURCE BROUGHT TO YOU BY

- Kelly Loder, School Counselor, Pequea Valley School District
 - Kelly_Loder@pequeavalley.org
- Christopher Laudo, School Counselor, Pequea Valley School District
 - Chris_Laudo@pequeavalley.org