samegoal

Tips and Tricks

Workflow Tips and Tricks
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We recently published a User Experience Survey to gather input from our users in an effort to better understand their wants and needs. If you haven't taken the survey yet, there is still time to fill it out if you would like to provide your feedback.

Take the survey

After reviewing the responses we have received so far, we wanted to highlight a few tips and tricks that some of our users may not be aware of. Did you know that in SameGoal you can:

- Switch translated documents back to English
- Recover changed or deleted document content using Document History
- Bulk share documents and bulk transfer ownership
- Bulk print documents and additional views
- Move between documents easily using Meeting Mode
- Receive notifications when guardians sign documents

Switch translated documents back to English

A document that has been translated into another language can be switched back to an English-only version of the document by a user with admin privileges by deleting the translation in Document History.

Steps *To delete a document translation:*

1. While logged in as an admin, open the Document History panel in your document by clicking on the clock icon [] in the toolbar.

2. Locate the translation event.
3. Click on the three dots in the event line and select **Delete this translation**.

Tip When a translation is deleted, it cannot be undeleted. A new translation will need to be requested.

Recover changed or deleted content

If you notice that a field within a document has changed and you want to recover the information that was previously there, you can do so with Document History.

Steps *To recover changed or deleted information:*

1. Open the Document History panel in your document by clicking on the clock icon [ ] in the toolbar.
2. Click on a historic event that contains the desired information.
    - The entire document will appear as it was at the time of the event, so you only need to find an event that occurred after the information was added and before it was changed/removed.
3. Scroll through the document to find the information you want to recover, and copy it.
4. Exit Document History by clicking on the clock icon again.
5. Paste the content into the current version of the document.

Tip Document History can look back a week on the Standard edition, 6 months on the Plus edition, and back to the feature's conception (07/01/2020) on the Pro edition.

Bulk share and transfer ownership

Documents can be shared in bulk, including transferring ownership in bulk.

Steps *To bulk share a document:*

1. Search for the documents you wish to share on a document list page (Caseload, All, Student's Documents tab, User's Documents tab, etc.).
2. Click on **Share** > **Update collaborators**.
3. Add and remove collaborators as needed, including updating permissions.
    - To transfer ownership, change which user has the **Is Owner** permission.

Tip In order to reassign someone else's documents, an admin user can view a user's caseload by finding them in the **Users** list and clicking on their name to be brought to their **Documents** tab.

Bulk print

Documents can be bulk printed (or downloaded) from a document list page, and if you're only selecting one form type, you will also have the option to bulk print additional views.

Steps *To bulk print documents/additional views:*

1. Navigate to a document list page (Caseload, All, Student's Documents tab, User's Documents tab, etc.) and select the documents you wish to print.
    - If you wish to bulk print additional views, use the **Forms** filter to only show documents of a single form type. Select the documents you'd like to print an additional view for.
2. Click on the printer icon [] in the toolbar.
3. Select a print view.
4. Print or download the documents.

Move between documents easily

We recently released a feature called Meeting Mode, which was added with the goal of making it easier to conduct meetings. One of the tools included with Meeting Mode is the ability to group documents together. However, you don’t need to have a meeting to group documents together.

Examples of when this might be beneficial include if you are filling out an IEP and it would be helpful to have the Evaluation document easily accessible, or if you are working on documenting progress for several students at once and grouping the Progress Reports together would speed up the process.

Steps *To group documents together:*

1. On a document list page (Caseload, All, Student’s Documents tab, User’s Documents tab, etc.), select the documents you want grouped together.
2. Once you’ve selected your documents, click on the screen icon [] in the toolbar.
3. Select **Present**.
4. Use the arrows in the top right corner to jump between documents.
5. When you are done, click on the screen icon again to exit Meeting Mode.

Receive guardian activity notifications

We recently added guardian activity notifications. Notifications are sent to the document owner(s) when a guardian edits a document, including adding their signature.

If you are not receiving guardian activity notifications when you would expect to, ensure you do not have this notification type disabled.

Steps *To check notification preferences:*

1. Click on the notification bell [ ] in the top right of your screen.
2. Access your preferences by clicking on the gear icon [ ] in your notifications tray.
3. Ensure at least one notification type is selected for **Guardian Activity**.