

## District Banks For Admin

### District Banks

District banks allow administrative users to store frequently used, compliant text at the district level. District bank values are accessible to all users district-wide, and may not be edited or deleted by non-administrative users. However, every user may add, edit or delete their own user bank values. Populating district banks:

- Provides end users with compliant text and suggestions
- Saves user time while authoring documents
- Reduces the amount of bank value creation and management required at the end-user level

**Steps** *To store district bank values:*

1. Visit **Settings > District Banks**.
2. Scroll or page to find the form you wish to add bank values to. Click the form name.
3. The form will appear in much the same format as when it is edited for simplicity. Any field which shows the text **Click to edit bank...** may be used to store district text.
4. Click in the field you wish to store text for.
5. Click **edit bank** in the bottom of the dropdown.
6. Click **add** to add a new value.
7. Enter your value, then click **done**.
8. To delete a bank item, click the X next to the item.

## Additional Tools

- **Bank substitution:** Banks support name and gender pronoun substitution. For example, if you store **[name] will tie his shoes** as a bank value, the text will be converted to **Jane will tie her shoes** when inserted into a document for Jane Smith. Write all bank values as if for male students to get correct gender substitution semantics. Banks also support substitution for:
  - [last name] or [lastname]
  - [age]
  - [birthday]
  - [grade]
  - [building]
  - [address]
- **Topics:** Bank values can be stored by **topic**. To add a value to a topic, click the **advanced** button while editing the bank value. Add the topic. The bank value will now be grouped with any other bank values with the same topic.
- **Keywords:** Bank values can be stored with a **keyword**. Providing a keyword for a bank value is especially helpful when a bank value is very long. A good example is when banks are used to store evaluation templates. If a bank value is given a **keyword**, the keyword will appear in the bank menu itself rather than the first few lines of the template. This can help you identify the bank value you are looking for more quickly. To add a keyword to a bank value, click the **advanced** button while editing the bank value. Add the keyword. When you go to use this bank value, you will see the keyword rather than full sentences in the dropdown.
- **Default text:** District bank values support default text. To make a bank value the default for a given field, click the **advanced** button while editing the bank value. Check the **Default text** option, then click **done**.

## District bank only fields

Admin users have the option to set specific fields to only allow district bank values. This can be done for any field that supports bank values. When a field is restricted to district banks, users will not be able to manually enter in their own input or populate the field with any of their user bank values. Rather, the field will functionally act as a dropdown menu where the selectable values are controlled by district admin.

**Steps** *Restrict a field to only district bank values:*

1. While logged in as an admin user, navigate to **Settings > District Banks**.
2. Click on the desired form and scroll to the field you'd like to restrict to district banks only.
3. Click into the field and update the list of district banks as needed.
4. Click on the gear icon [⚙️] next to the field.
5. Select **District banks only**.
6. Changes will save automatically.

**Tip** If a user has saved user bank values for a field that is later restricted to district banks, the user bank values will no longer appear in the bank list. However, if the field is ever switched back to allowing other inputs, a user's saved user banks will be restored.

**Tip** If a user has already populated a field with their own content and then the field is later restricted to district banks, the field contents will remain until the user populates the field with one of the district bank values. At that point, the user would not be able to replace the field contents with their previous custom content.

**Tip** In district bank only fields, a field can only be populated with one of the available district bank values. To include a list of values in one of these restricted fields, the list itself will need to be added as a single district bank value. If a field is currently populated with a value and a different district bank is selected from the list, the new value will replace the existing value. A user can clear the contents of the field by clicking clear in the bottom right corner.

## Bank Templates

District banks can be used to create templates for document authors to use. Templates can:

- Provide fill-in-the-blank style content to help save users time.
- Create an outline for users to follow to ensure they are responding to all required components of a question.
- Include pre-made tables for users to fill out.
- Encourage users write "SMART" goals by highlighting each element of a "SMART" goal.