

## 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 districtwide, 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.

### **Tips**

- **Name/gender pronoun 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.
- **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.** Multi-line 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**.