samegoal

Document Validation

Document validation

Document validation rules may be configured for forms throughout SameGoal. These rules help document authors to easily catch missing and inconsistent information as documents are authored, and increase compliance.

If validation rules apply to a document:

- As a user authors documents, they will see a red asterisk denoting required fields and a red dot denoting any validation rule that has not yet been satisfied. As the user satisfies each rule, the asterisk/red dot will disappear.
- Users can also click on the validation mode icon (check mark in a circle) which will allow users to arrow over to each error. Once all validation rules have been satisfied, the following message appears: **"No validation errors."**
- If a user attempts to mark a document complete while there are unsatisfied validation rules, the action will be prevented and a dialog stating the name of the document, the number of errors, and an expandable list of error descriptions will appear. This indicates the user should validate the document and resolve any unsatisfied rules before re-attempting to mark the document complete.
- Not all forms contain validation rules. If a form does not contain any validation rules, validation mode will be disabled.

All administrative users will have the ability to override this warning and complete documents with errors on a document-by-document basis as needed after entering a reason.

Additionally, administrative users may enable a district-level setting to allow non-administrative users to complete documents with errors on a document-by-document basis.

When the district-level setting is enabled, an additional button will appear in the dialog box for non-administrative users which states **"Mark complete with errors"** along with a request for the reason the document with unresolved validation errors needs to be marked as complete.

Steps *To enable the non-administrative user override feature:*

1. Visit **Settings > District information > Details**.
2. Check the **Allow non-administrative override** box. The new setting will be autosaved.
3. Users must refresh the application by reloading the page (CTRL + r on Windows or Cmd-r on Mac), or logout and re-log in for the update to take effect.

Tip **Document validation rules include checks for compliance, completeness and consistency. When a document is completed with errors, this document may not appear in district administrative reports or state reporting extracts. While completing a document with errors may be required in exceptional cases, we encourage districts to complete documents with errors thoughtfully and sparingly.**