samegoal

Document Overview

Each document in SameGoal is presented the same way for consistency and simplicity.

Toolbar

Rich text editing and document tools are found in a toolbar located across the top of the document.

- Rich text editing tools are located in the left of the toolbar.
  - These tools are enabled when you click into a text box.
  - All text boxes support rich text editing.
- Standard document tools are located in the right of the toolbar.
  - **Collapse** [^]: This button collapses the top portion of your screen when you need more space or are projecting during a meeting.
  - **Print** [🖶]: The print menu button contains options to print the full document, section you are working on, and/or any alternate views for the document you are working on.
  - **Meeting Mode** [🖵]: This button allows you to enter into Meeting Mode, which optimizes your screen for presenting.
  - **Document History** [🕘]: This button pops out the document's Document History panel, that allows all users with access to the document to see changes over time.
  - **Validation mode** [✓]: This button puts the document into "validation mode", which is like spellcheck in the sense that it goes through the document validation errors one at a time, allowing the user to correct them then move to the next.
  - **Translation** [文A]: This button allows users on the Pro edition of SameGoal to request document translations.
  - **Document status** [🔒]: This button displays a locked lock icon when the document is marked complete, and an unlocked lock icon when the document is incomplete. Depending on the document's status and your permissions, this menu will include options to:

- **Complete:** If the document is incomplete and you are the document owner.
- **Incomplete:** If the document is complete and you are an administrative user.
- **Amend:** If the document is complete and you are the document owner.
- **Copy to new document:** If the document is complete, you have sufficient form permissions, and it is not disabled for the given form type.

Document bar

The blue document bar includes:

- **Form name:** Located in top left.
- **Student name:** Located next to form name. Click it to return to the student's **Documents** tab.
- **Student ID:** Located in parentheses next to student name.
- **Section tabs:** Each document is divided into one or more sections. Each section tab shows the full section name on hover.

Document navigation

To navigate within a document, you can:

- Click each section tab to move section by section.
- Scroll top to bottom through the document using the scrollbar on the right.
- Use you browser's **Find in page** capabilities to quickly jump to specific document areas, since the whole document is loaded immediately when you visit it.

Display density

You can change the spacing between document sections by adjusting your **Display density** preferences. To do so, visit your account menu in the top right, and select **Display density**.

Attachments

The **Attachments** tab found on the right of any document allows you to attach files directly to the document. PDF attachments can then be printed at the end of the document.

Share

The **Share** tab found on the right of any document allows you to share the document with other team members.

Save status

The status of the document's saving is found in the top right next to your notifications tray (bell icon). All document edits are automatically saved.