



# Administration

## Printing SEND Portal Forms

The print functionality is available to print SEND Portal forms via the One Citizen Portal and the One Professional Portal. The print functionality enables you to print the data held in One and the information that is visible on the screen.

When printing, ACL and panel permissions are taken into account. If the user does not have permission to view a panel then it is not included in the printout.

Similarly, if access or visibility restrictions exist for posts, groups, establishments or service teams, these are not included in the printout.

The One software does not print SEND Portal forms directly, it outputs to either a Word file or a PDF that can then be printed.

### Opening SEND Portal Forms for Printing

SEND Portal forms are accessed via:

- Focus | People | Students | Student Details | Chronology | New | New SEND Portals.
- Focus | People | Person | Person Details | Chronology | New | New SEND Portals.
- Tools | Administration | Form Builder | SEND Portal Forms | SEND Portal Form Definitions | SEND Portal Form Definition | Create New Form For Data Entry.

The **Print** button is not available until the form has been saved.

Select the check box on a panel header to include the information in the printout.

### Printing SEND Portal Forms

To print a SEND Portal form:

1. Open a form from one of the above locations.

2. Click the **Print** button to display the **Print Window** dialog.



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3. Select the **Data Panels** to be included in the printout.

The **Subject Details** panel is automatically selected.

Any panels that were selected on the form are checked here.

Click the plus sign to expand the tree to view the questions in the panel.

Selecting the main panel selects all the questions within that panel. Select or deselect panels and questions, as required.

The headings displayed on the printout are in numerical order and not the panel numbers.

The font type and size for the panel title and sub-title can be changed and a logo can be inserted via the *CCSGenericPrintSettings.ini*. For more information, refer to the handbook.

### More Information:

For more information on SEND Portal forms, refer to the following handbooks:

- *One SEND Citizen Portal Handbook.*
- *One SEND Professional Portal Handbook.*

The screenshot shows the 'Print Window' dialog box. On the left, the 'Data Panels' section contains a tree view with '001. Subject Details' selected. Below it are buttons for 'Select All' and 'Deselect All'. The right side of the dialog has several sections: 'Document Type' with radio buttons for 'Normal' (selected), 'Notes', and 'Guidance'; 'Case Note' with checkboxes for 'Add as Case Note' and 'Attach'; a dropdown menu set to 'WORD'; 'Bookmarks' with a dropdown menu and 'Create Bookmark' and 'Delete Bookmark' buttons; and 'Page Breaks' with a checkbox for 'Insert Page Breaks After Each Panel'. At the bottom are 'Print' and 'Cancel' buttons.

4. Select a **Document Type**. The default type is **Normal**; this prints the selected content of the form.

Selecting **Notes** prints a blank page after the contents of each panel.

Selecting **Guidance** prints out the **Form Guidance Notes**, if they were entered via the **Form Definition** page.

Case Notes are not required for SEND Portal forms.

5. Select to print the document in **WORD** or **PDF** format.

Bookmarks are not required for SEND Portal forms.

6. If required, select the **Insert Page Breaks After Each Panel** check box.
7. Click the **Print** button to preview the document.
8. Save the document to a location on your PC, then print.