

Salesforce Guide: Submitting a New Draft

Find a School:

1. Once you have logged in to Salesforce (<http://login.salesforce.com>), from the home page scroll down to “My Report Drafts.” Under “My Report Drafts,” **click on the DBN** for the report you would like to submit.

My Report Drafts

Salesforce Director: Rod Bowen			
Reviewer/Reader			
DBN	Date of Review	Waiting On	Reviewer
15K051	11/5/2015		Rod Bowen
75Test	11/12/2015		Rod Bowen
16K025	11/12/2015		Rod Bowen
16K005	11/19/2015		Rod Bowen

Start First Draft:

2. On the Report Draft page, **click the *Start 1st Draft*** button at the top (you only need to do this once).

Report Draft Detail

Edit Delete **Start 1st Draft** Submit to Reader

DBN 12X251

Entering Preliminary Ratings:

3. Scroll down and enter your preliminary ratings in the “**Area of Celebration,**” “**Area of Focus,**” and “**Additional Findings**” sections of the Report Draft page.
4. For instructions on how to enter preliminary ratings, see the [Preliminary Rating Guide](#).
5. Once you have entered your preliminary ratings, scroll to the top of the page and **click the *Save* button**. If you skip this step, you will lose your work! The answers you select for each field will be in **ORANGE FONT** **until you hit the *Save* button**. Here is an example of how the AoC should look after saving your work.

▼ Area of Celebration	
Indicator	2.2
Preliminary Rating	P
Sub-Indicators	bc
Sub-indicator a) Rating	P
Sub-indicator b) Rating	P
Sub-indicator c) Rating	P

Answering Framework for Great Schools Questions:

There are two optional questions that reviewers can answer regarding the FfGS.

6. Below the AoC, AoF, and Additional Findings sections, there is a “**Framework for Great Schools**” section.
7. Hover your cursor over the answer field until it becomes highlighted in blue, then double click the field.

▼ Framework for Great Schools	
Q1.	In the process of the Quality Review for this school, did you observe or hear any connections between the FfGS and the QR?
A1.	
Q2.	If yes, please provide a brief description of the connection made and include at what

8. Select your answer from the drop down for the first question.
9. For the second question, you will type your answer. For content guidance on the FfGS questions, please reach out to Rod Bowen.

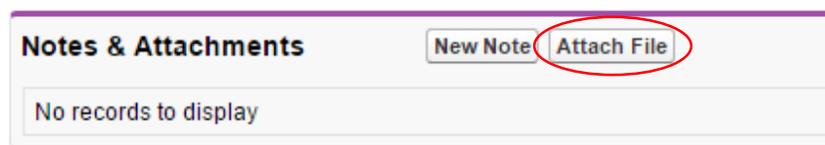
▼ Framework for Great Schools

- Q1. In the process of the Quality Review for this school, did you observe or hear any connections between the FfGS and the QR?
- A1. **Yes**
- Q2. If yes, please provide a brief description of the connection made and include at what point in the process it was observed/heard.
- A2. **Enter response here.**

10. Once you have entered your FfGS answers, scroll to the top of the page and **click the Save button**. If you skip this step, you will lose your work! The Answers you select for each question will be in **ORANGE FONT** until you hit the **Save button**.

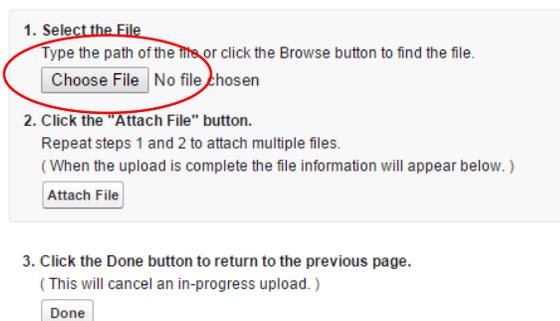
Attach First Draft and Submit to Reader:

11. Once you have saved your preliminary ratings and FfGS questions, scroll to the bottom of the page and **click the Attach File button** in the “Notes & Attachments” section.

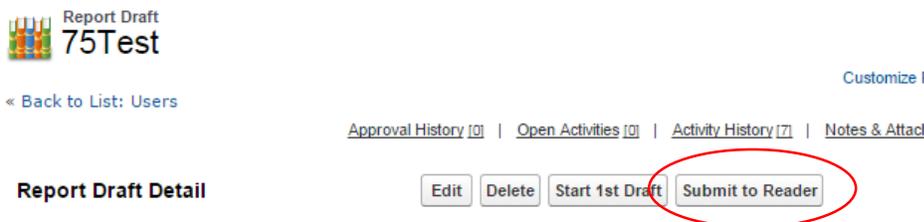


12. Browse for your file, **click Attach File**, and **click Done** once the file is done uploading.

Attach File to Report Draft 75Test



13. You will automatically be redirected to the Report Draft page. **Click the Submit to Reader button** at the top of the page. You have successfully submitted your First Draft!



Note: If you do not click **Submit to Reader**, then the reader will not know your draft is ready for them. You **MUST** click **Submit to Reader**.

View First Read, Attach Second Draft, and Submit to Reader:

14. When your Reader has completed her/his first read and your report is ready for a Second Draft, the draft will be highlighted in **YELLOW** under the “My Report Drafts” section on your Salesforce homepage. You will also have received an email.



15. Navigate to the Report Draft page by clicking the highlighted DBN in the “My Report Drafts” section.

16. Scroll to the bottom of the page to the section called “Notes & Attachments.”

17. View the reader’s First Read by **clicking View**.

Notes & Attachments			
Action	Type	Title	Last Modified
Edit View Del	Attachment	01M450 - First Read.doc	11/1/2011 9:45 AM

18. Download the report and complete your Second Draft.
19. When you are ready to submit your Second Draft, navigate to the Report Draft page if you have not done so already (step 14 and 15 of this guide).
20. Then scroll down to the bottom of the page and **click the *Attach File* button in the Notes & Attachments section.**
21. Once you have attached your Second Draft in the same way you attached the First Draft (step 12 of this guide), **click the *Submit to Reader* button** at the top of the Report Draft page. You have submitted your Second Draft and are now done with this Report!

If you need further support please reach out to your Program Associate by phone or email.