FY27 Custom Form Handout:

Custom Forms are documents that can be linked to a person's record in Infinite Campus. Districts can create their own forms that can be set to pull information directly from Campus and/or have the data entered on the form reported in Ad Hoc

Note: *Only PDFs created in Adobe Acrobat Professional or Adobe DC are supported for Custom Form creation.*

<u>Before Uploading to IC:</u>

- ✓ Create a document that can be converted into a PDF document *(Word, Excel, Powerpoint, etc.)*
- ✓ It is recommended that most of the editing be done prior to conversion to PDF
    - Remove extra lines, spaces and tabs, boxes, ect.
- ✓ An interactive Custom Form can contain the following form elements:
    - Check Boxes, Radio Buttons, Text fields, Dropdown lists, Date fields, Number fields
        - *Use checkboxes instead of radio buttons because a radio button cannot be unmarked once selected*
- ✓ List boxes, Signature fields and Bar Codes are not supported field types
- ✓ Form Field names should be as short as possible *(Do not let Adobe automatically name form fields).*
- ✓ *Do not use special characters*
- ✓ ONLY use multi-line text fields when fields should have multiple lines of text. Users should select auto-font for text fields that should not print on a second page like for names, dates, addresses, etc.
- ✓ The following fonts are supported: Helvetica, Times New Roman, Time Roman, Courier
- ✓ All Custom Forms should be run through the Action Wizard Prior to importing into IC.

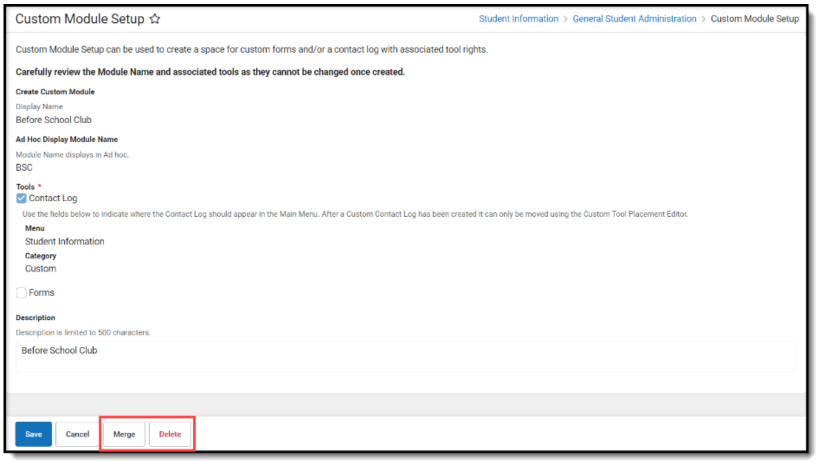
<u>Create a customized Action in the Action Wizard:</u>

1. In Adobe go to Tools > Action Wizard
2. Click Create New Action *(the Create new action menu displays)*
3. Navigate to **Protection** and select **Remove Hidden Information**
4. Click **Specify Settings** and <u>uncheck</u> the following: Form Fields, Deleted or Cropped Content, Links and Actions. Click OK
5. In the Create Action menu, go to **Document Processing** and click **Reduce File Size**
6. Click Save.

Once all form fields are added and formatted as desired, run your customized Action on the completed form and save the finalized file. The form is not ready to be uploaded in IC!

Custom Module Setup:

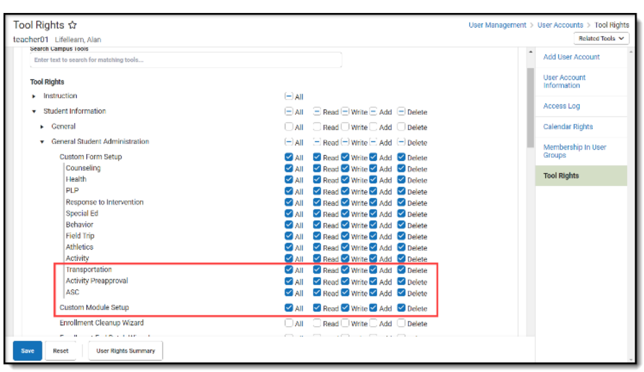
Used to create and manage organizational modules that store Custom Forms and/or Contact Logs. Current Modules: Attendance, Counseling, Health, PLP, RTI, Special Ed



Display Name	Name that displays in Module dropdown for Custom Forms. It CANNOT be modified after saving.
Ad Hoc Display Name	Unique database name of the module *(15-character limit)*. It CANNOT be modified after saving,
Description	Optional information about the module and CAN be modified after saving.

Users should log out and back in to assign tool rights and view the Custom Module in the dropdown of the Custom Forms tool.

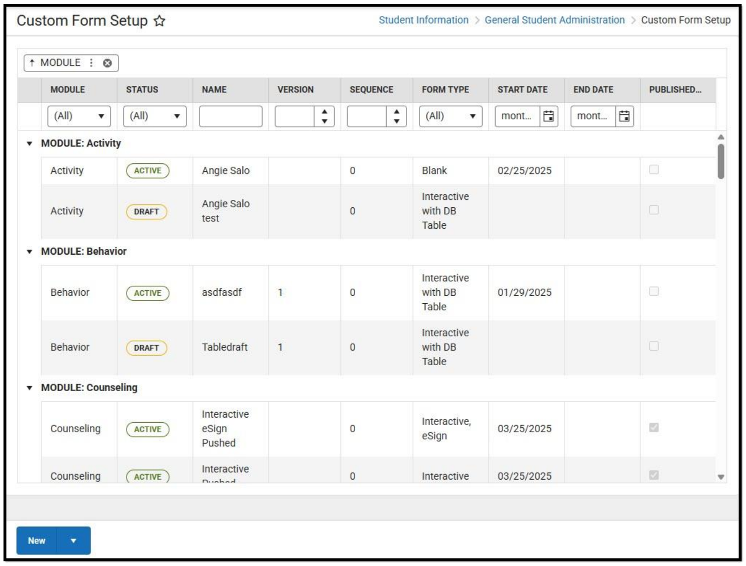
Tool Rights: Each Custom Module Custom Form creates separate tool rights in the custom Forms and Forms tool rights folders.



Important to Note: Custom Module Custom Forms cannot be deleted. If it is no longer used, remove all user tool rights for the module.

<u>Custom Forms List:</u>

By default, all existing Custom Forms are sorted by Module. To sort further click on the column headers. You can enter text or select values in the dropdown menu.

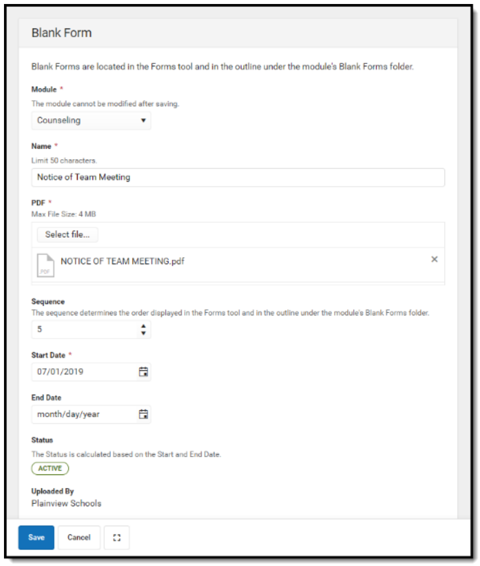


Header	Description
Module	The module where the form is available
Status	Indicates if a form is available to attach to a person's record. **Active:** Have a Start Date on or before current date **Inactive**: Have an End Date before the current date or a Start Date after the current date **Draft**: Those that do not have a current or future start date. **Draft forms can be previewed on a person's Forms tool or Documents tab.*
Name	Name of the form
Version	The version number is associated with the form, and only active versions of the form are displayed in the list view.
Sequence	The order that the form displays in the custom forms list screen.
Form Type	Indicated is the form is <u>Portal, Portal Fillable, Portal eSignature, Interactive with Database Table, Interactive or Blank</u>
Start Date	The forms is active as of this date
End Date	The form is inactive by this date
Published from State	Indicates the form was sent to districts from the state. These custom forms cannot be unpublished or deleted, but they can be end-dated.

Blank Forms

Blank Forms can only be printed and are located in the Forms tool.

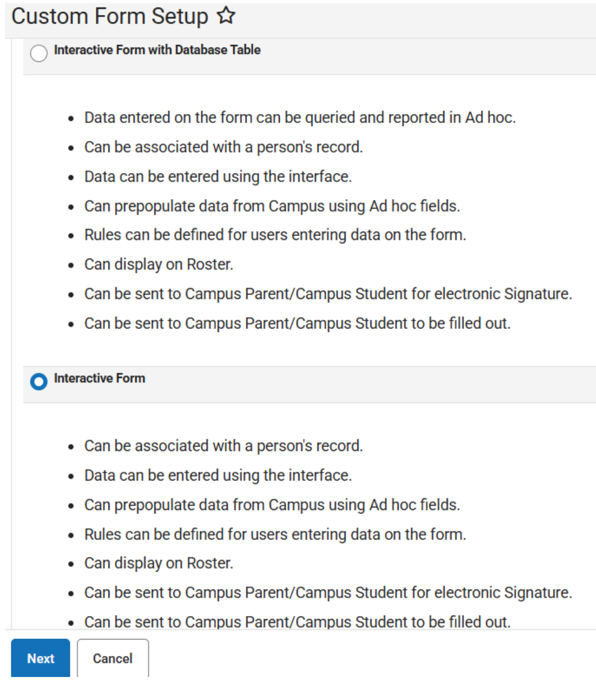
1. Click the arrow next to New and select **Blank.** The Blank Form upload screen displays.



2. Select the module where the form will be available.
3. Enter a Name for the form and Select File.
    a. Locate the PDF file from your documents and click Open
4. Enter a Sequence number
5. Enter a Start Date for when the form becomes active. It is optional to enter an End Date at this time for when the form becomes inactive.

Once Active, the Blank Form is available for users to print from the Forms tool.

Interactive Form & Interactive Form with Database Table



Interactive Forms allow users to enter data directly into the form from a person's Forms tool. Existing data from Campus can be pulled into the form. These forms allow the form to be displayed on Roster or on the Campus Parent and/or Campus Student Portal. Guardians and students can also electronically sign and fill out information using the Portal.

*Selecting Interactive Form with Database Table allows the information to be queried and reported in Ad Hoc.

Steps for Interactive Forms:

Upload, Prepopulated Fields, Configuration Table*, Define Rules, Publish and Preview Draft Forms.

Note: *The Configure Table step only applies to the Interactive with Database Table form type.*

The pages to follow will cover the various steps to create an Interactive and Interactive with Database Table form.

Level 1 - Upload:

The first step in the creation process is to upload the PDF file and enter pertinent details regarding the form.

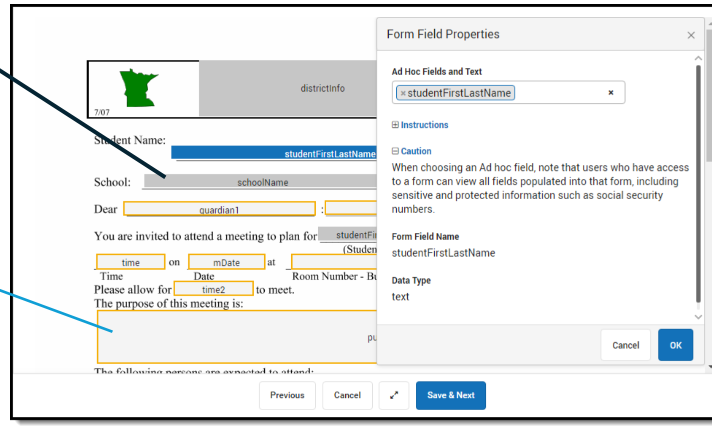
Field	Description
Module	The module where the form is available.
Name	The name of the form as it displays on the Forms list
PDF	Only PDF documents can be uploaded
Display on Portal	When Campus Parent and/or Campus Student is marked and the form is attached to a student and locked, a read-only version of the form displays on the Specific Portal application.
Guardian/Student eSignature Request	When display Custom Form on Portal option and one of these options are marked, a request for an electronic signature is sent to the student and/or guardian(s) on their Portal. *Contact META for assistance*
Guardian/Student Fill out Form	When the Display on Portal, eSignature and this option are marked a request for data entry and signature is sent to the student and/or guardian(s) on the Portal.
Display PDF on Roster	When the form is attached to a student, a PDF version of the form is displayed on the Roster.
Sequence	The order in which the form is displayed in the custom forms list screen and in the dropdown of forms available on the person's Forms tool.
Overflow	A checkbox that toggles the overflow functionality. When marked users can input text into multi-line text fields beyond the limit of the field space. Overflow text prints on subsequent pages.
Comments	Optional field used to enter text related to the form/details of the uploaded file. 500-character limit and only visible within this tool.
Instructions	Optional text that will appear when creating a new document for a person containing instruction for use, rules, etc. *500-character limit*
Form Count	The number of instances of this form created for people in Campus
Uploaded By	The name of the user who uploaded the form

Level 2 - Prepopulated Fields:

This step maps Ad Hoc fields that pull data from Campus into the form. It reduces the amount of data entry when a user fills out a form for a person *(not all fields need to be mapped)*. *This is an optional step and can be completed at any time, even after a form is Active and attached to a person.

Dark gray fields indicate that a mapped Ad Hoc has already been mapped onto the form.

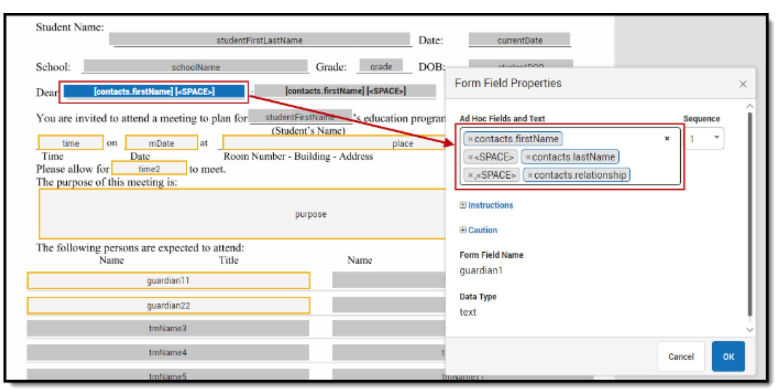
Light gray fields with orange border indicate the field does not have a mapped field name assigned yet.



Field Sequence- Ad Hoc fields may be selected multiple times to prepopulate data from multiple records *(ex: 4 different behavior incidents)*.

Link Ad Hoc Fields- Ad Hoc fields can be linked together or combined to pull related information into one field on forms *(combining Ad Hoc fields can only be done during this step)*. Can use non-Ad Hoc text between Ad Hoc fields *(the, and, Symbols like: comma, semicolon, colon, and/or spaces)*

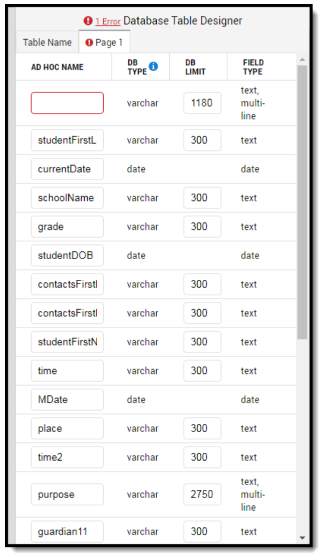
- Users must select non-Ad Hoc text by either clicking on the selection in the dropdown or hitting the Enter key before proceeding.



Level 3 - Configure Table:

Only for Interactive Form with Database Table:

This is used to define the table name, column names and character limits for each field on the form. Once the form is published, any data entered into the form for a person can then be reported in Ad Hoc. **Existing documents cannot be converted into an Interactive Form with a database table.**



Field Name	**Description**
Field Type	The type of field in the document *(Text, checkbox, dropdown, etc.)*
Ad Hoc Name	The name of the field as it appears as a column name in Ad Hoc. Suggestions are prepopulated but can be modified.
DB type	3 types are supported: Varchar *(Text)*, Number and Date. Using date fields allow users to sort, and filter reports by date. **These are configured when creating the PDF in Adobe, before uploading the form.**
DB Limit	The maximum allowable character limit that can be entered and saved into the field. Suggested are prepopulated based on size of the field but can be modified. If limits were set in Adobe, values cannot be modified here.

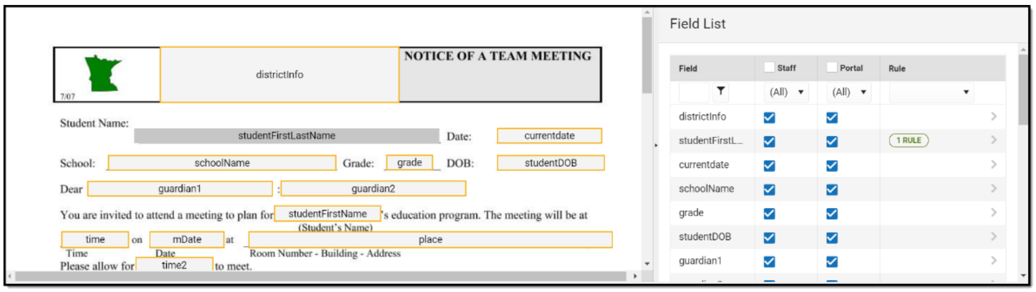
After entering Ad Hoc names and database limits for each field on the form, click Save & Next.

**Users cannot advance to the Publish screen until all fields are named with database limits and fixing all errors.*

Level 4 - Define Rules:

Form administrators can add rules to the form. This step is also used to define which user can fill out each field, for forms sent to Campus Parent/Student Portal to be filled out. By default, all fields are marked for Staff and Portal *(only displayed for fillable forms on Portal).*

This is an optional step and can be completed at any time, even after the form is Active and attached to a person.



- Light gray fields indicate the field does not have a rule defined
- Dark gray fields indicate a rule is defined for that field
- Staff and Portal checkboxes indicate which users can enter data into that field
- Multiple rules can be created for one field.

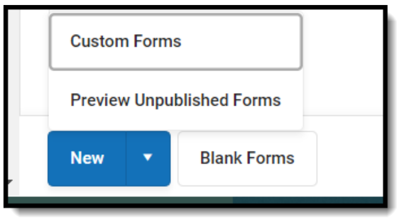
Level 5 - Preview Like a Pro:

Users can preview Interactive and Interactive with Database Table custom forms in draft status on a person's Forms tool or Documents tab. This preview allows form administrators to troubleshoot and test custom forms before they are published.

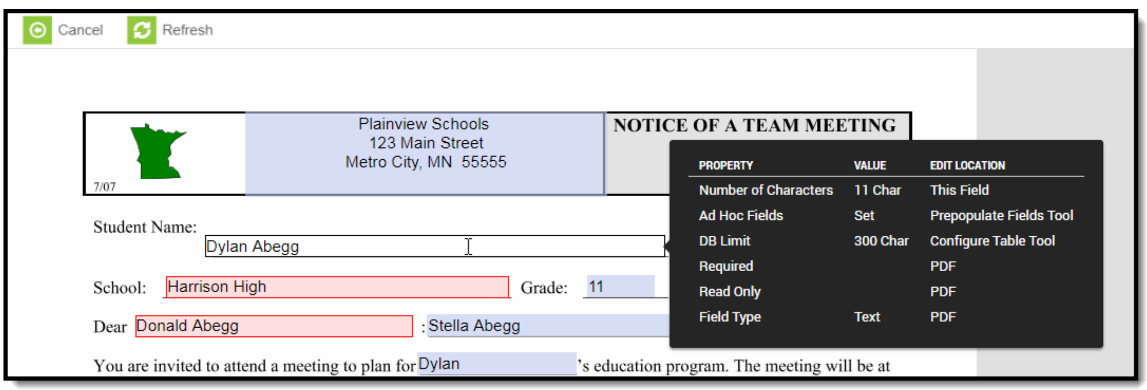
Pro-Tip: Open the Custom Forms module and the Preview screen in 2 separate browser windows. Saving changes made to the form using the Custom Forms module can be seen on the preview screen when the user clicks the Refresh button.

Steps for viewing Preview Draft Forms:

1) Go to Student Information > General > Forms to showcase the **Forms List Screen**
2) Click the down arrow next to the NEW button and select **Preview Unpublished Forms**.

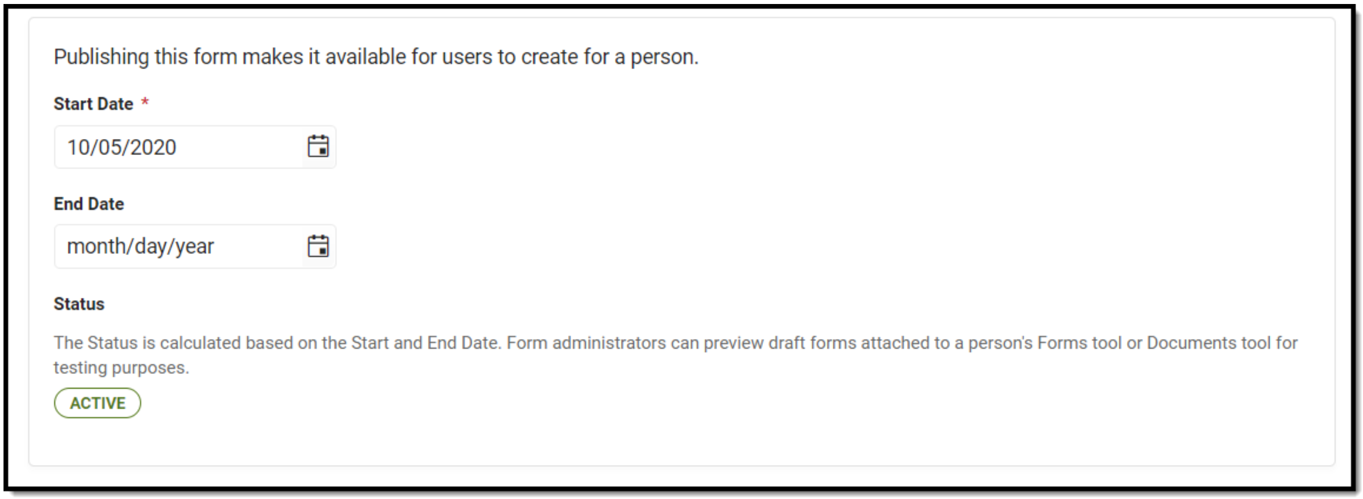


3) Choose the form from the **Select Form to Preview** screen
4) If data selection is applicable on the form, select the prepopulated data for the person.
5) Click the **Preview Form** button, the draft custom form displays.



Level 6 - Publish Form:

Publishing makes the form available for use to fill out for a person and creates a database table for the Interactive form with database table.


Publishing this form makes it available for users to create for a person.

Start Date *

10/05/2020

End Date

month/day/year

Status

The Status is calculated based on the Start and End Date. Form administrators can preview draft forms attached to a person's Forms tool or Documents tool for testing purposes.

ACTIVE

Field	Description
Start Date	The form is active as of this date. The start date can be on a past, current or future date.
End Date	The form is inactive after this date. This field can be left blank.
Status	The state of the form. This is calculated based on the Start and End date. Deactivating a form removes it from the user's custom form selection list. However existing forms can still be edited and/or copied if deactivated.

Versioning a Form

Allow users to correct typos, update details for state or district changes, create an updated form for the next school year, etc. and will still retain a previous version of the form. Only the most recent version of the form can be versioned.

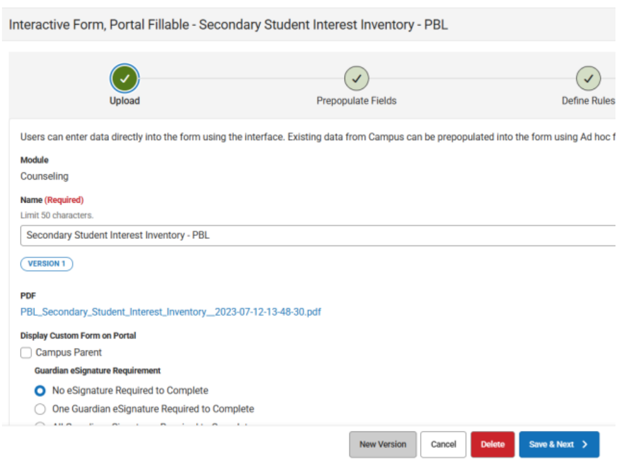
The following modules do not have version functionality: Activity Registration, Dependent Care, Activity, Activity Preapproval, Athletics, Field Trip.

Getting Started:

- An existing Custom Form must exist before it can be versioned
- Make sure you have a new PDF file saved to your computer before versioning a custom form.

Steps:

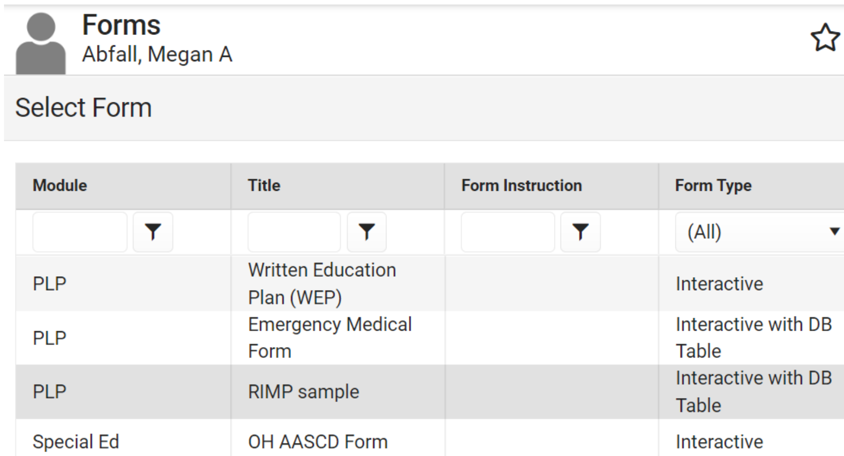
1. Select the recent version of the form
2. Click New Version *(all configurations will be copied to the new version)*



3. Click Select file to enter new PDF form *(must be a new pdf)*
4. Enter description in the New Version Reason Description
5. Existing Mappings and Rules CAN be modified, but the items on the configuration table cannot be changed. Only new fields can be modified on the configure Table Screen.
    a. *If a new configuration table is needed, it is best to create a new form.*
6. Once you have completed updates enter the Start Date on the Publish Screen and Select Finished.
7. *Note: The previous version is automatically End Dated one day before the start date of the newest version.*

Adding Form to Student

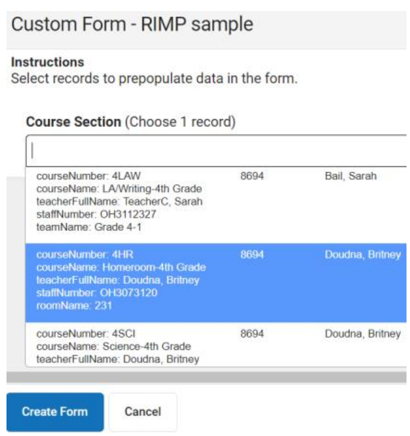
Student Information > General > Forms stores and manages all Custom Forms attached to a student. Custom Forms added and edited using the module-specific Document tools display in the Forms tool.



Module	Title	Form Instruction	Form Type
			(All)
PLP	Written Education Plan (WEP)		Interactive
PLP	Emergency Medical Form		Interactive with DB Table
PLP	RIMP sample		Interactive with DB Table
Special Ed	OH AASCD Form		Interactive

Select Prepopulated Data:

Forms may include multiple fields mapped to the same Ad Hoc field, such as reporting a list of behavior events. The user creating the form indicated the order the records should populate on the form, or which items are populated.



After making all selections, click the **Create Form** button and the selected records will display in the form.

<u>Important Notes:</u>

- For a Custom Form to display on Portal: The portal Preference on the Documents section is marked for the module the form is located, and the Custom Form is attached to a student and locked.
- In order for a user to view a Custom Form on Roster the staff member must have these 3 options: 1. Read rights for Student Information > General > Forms > (Module) > Custom Forms OR Student Information > (Module) > General > Documents > Custom Forms. Must also have Read tool rights for Scheduling > Section > Roster OR Campus Instruction > Roster > Roster > Roster AND the custom form is attached to a student and locked.
- Data entered into an interactive form with a database table <u>does not modify any existing data in Campus fields</u>. Existing data can be pulled into the form and data entered into the form can be reported in Ad Hoc, but the existing data is not rewritten.
- For Custom Forms with Database Tables, **Time fields are not recommended** and do not report correctly via Ad Hoc.
- The following symbols cannot be saved into text field**: &, #, %**
- **Users who have rights to a form can view all data that may be pulled into that form, regardless of them not having rights to that data or the tool it comes from.**
- <u>OLR data is not available in Ad Hoc and cannot be pulled directly into a Custom Form</u>. The data must first be posted from OLR to custom fields on a custom tab and then mapped to fields on a Custom Form.
- Campus does not recommend using the Reserved Name list to map prepopulated fields, as these are legacy fields and <u>may not return data as expected</u>.
- Once a **Configuration Table** is published, the table name, column names and database limits **cannot be edited** and will become read-only. Database tables cannot have the same name as another custom form database table.
  - Before publishing, users can preview Custom Forms to test Ad Hoc mappings, database limits and rules.
- Custom Forms **cannot be deleted** if there are instances associated with a person's record.
  - It is advised to add an end date to a custom form for historical purposes.
- If a versioned custom form is not associated with a person's record, it can be deleted.
  - The previous version reactivates, but the End Date fields would need to be manually modified.

Questions:

Contact Us:

- ✓ **META IC Support:** infinitecampushelp@metasolutions.net
- ✓ **META IC Training Videos & Docs:** metasolutions.net/campustraining
- ✓ **META IC Website:** metasolutions.net/infinitecampus

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