

Custom Forms Setup

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[Custom Forms List](#) | [Create a New Custom Form](#) | [Delete Existing Custom Forms](#) | [Interactive Form with Database Table](#) | [Interactive Form](#) | [Blank Form](#) | [Reserved Name List](#)

Tool Search: Custom Forms Setup

The Custom Forms tool uploads and manages supplemental documents that can then be linked to a person's record. Custom Forms can be set up to pull information directly from Campus and/or have data entered into a form queried and reported in Ad hoc.

Three types of forms can be created using this tool. Select an option below to read detailed instructions on how to create each type:

- [Interactive Form with Database Table](#)
- [Interactive Form](#)
- [Blank Form](#)

See the [Custom Form Creation](#) and [Troubleshooting Custom Forms](#) documents for additional information.

Custom Forms List

By default all existing Custom Forms are **sorted** by Module. Drag column headers to the top of the screen to further sort. Forms can also be sorted by clicking on the column headers.

Enter text into the fields below the header or select values in the dropdowns to **filter** the list of Forms. The funnel icon provides additional filtering options. Custom forms can be filtered by Module, Status, Name, Sequence, Form Type, Start Date, and/or End Date.

Custom Forms

↑ MODULE ×

MODULE	STATUS	NAME	SEQUENCE	FORM TYPE	START DATE	END DATE
(All) ▾	(All) ▾	student		(All) ▾	month/... 📅	month/... 📅
▼ MODULE: Counseling						
Counseling	ACTIVE	Student of the Month Award	0	Blank	01/01/1901	
Counseling	ACTIVE	Student Transfer Form	0	Blank	01/01/1901	
Counseling	ACTIVE	Student Checkout	3	Interactive	07/16/2019	
Counseling	INACTIVE	Student AZWDFormFY...	0	Interactive	01/01/1901	01/01/1901
Counseling	INACTIVE	Student of the Month Award	0	Blank	01/01/1901	01/01/1901
Counseling	INACTIVE	Student Transfer Form	0	Interactive	01/01/1901	01/01/1901
Counseling	INACTIVE	Student Transfer Form	0	Interactive	01/01/1901	01/01/1901
Counseling	INACTIVE	Student Transfer Form	0	Blank	01/01/1901	01/01/1901
▼ MODULE: Health						
Health	ACTIVE	Student Medication	0	Interactive	01/01/1901	

New ▾ 🔄

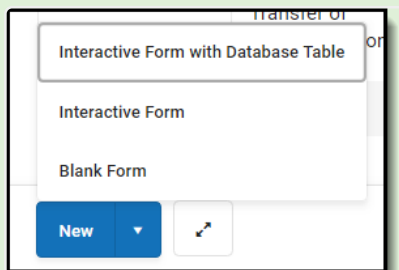
Custom Forms Filter By Module

Column Header	Description
Module	The module in which the form is available.
Status	<p>The state of the form. The Status indicates if a form is currently available to attach to a person's record.</p> <ul style="list-style-type: none"> • Active forms have a Start Date on or before the current date. • Inactive forms have an End Date before the current date or a Start Date after the current date. • Draft forms are those that do not have a Start Date or a future Start Date. <p>Custom Forms in draft status can be previewed on a person's Forms tool or Documents tab. See the Preview Draft Forms section for additional information.</p>
Name	The Name of the form.
Sequence	The order in which the form displays in the custom forms list screen, in the dropdown of forms available on the person's Forms tool or Documents tab (Interactive Forms), and in the Outline (Blank Forms). Lower numbers appear higher on the list.
Form Type	<p>An indicator if the form is Portal, Portal Fillable, Portal eSignature, Interactive with Database Table, Interactive, and Blank.</p> <p>See each section below for detailed instructions on how to create each form type.</p>
Start Date	The form is active as of this date.
End Date	The form is inactive after this date.

Create a New Custom Form

Click the **New** button to open the **Form Type** selection screen. See each section below for detailed instructions on how to create each form type.

Clicking the down arrow on the **New** button provides a shortcut to select the form type and skips the Form Type selection screen.



New Button Options

Custom Form Type

Choose a custom form type.

Interactive Form with Database Table +

Interactive Form -

- Can be associated with a person's record.
- Data can be entered using the interface.
- Can prepopulate data from Campus using Ad hoc fields.
- Rules can be defined for users entering data on the form.
- Can display on Roster.
- Can be sent to Campus Parent/Campus Student for electronic Signature.
- Can be sent to Campus Parent/Campus Student to be filled out.

Blank Form -

- Can be printed.
- Data cannot be entered using the interface.

Custom Form Type Selection Screen

Delete Existing Custom Forms

Custom Forms cannot be deleted if there are instances of the form associated to a person's record. The Form Count field is located on the Upload screen and indicated the number of instances of this form created for people in Campus.

Existing Custom Forms can be deleted if necessary. Campus advises adding an end date to the form instead of deleting a custom form for historical purposes.

Click on an existing Custom Form and click the Delete button. Database Tables will be removed when the Form is deleted.

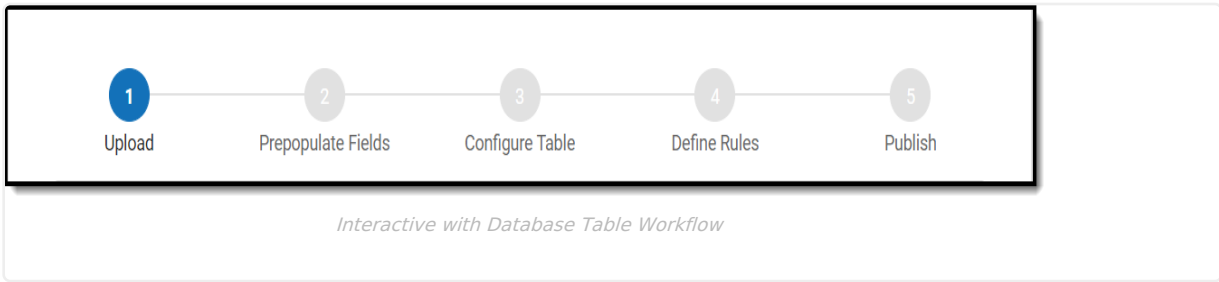
Interactive Form with Database Table

Data entered into an interactive form with a database table can be queried and reported in Ad hoc. See the [Custom Forms in Ad hoc](#) section for additional information. Users can enter data directly into interactive forms from the person's Document's tool or Forms tool. Existing data from Campus can be pulled into the form.

Additional options for interactive forms include allowing the form to display 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.

Data entered into an interactive form with a database table does not modify any existing data in Campus fields. Existing data can be pulled onto the form and data entered into the form can be reported in Ad hoc, but existing data in Campus is not rewritten.

From the **Form Type** selection screen, select the **Interactive with Database Table** form type and then click **Next**. The Interactive with Database Table workflow displays.



Select a link to navigate to a step in the Interactive Form with Database Table creation process:

- 1. [Upload](#)
- 2. [Prepopulate Fields](#)
- 3. [Configure Table](#)
- 4. [Define Rules](#)
- 5. [Publish](#)
- 6. [Preview Draft Forms](#)

[^ Back to Top](#)

Interactive Form

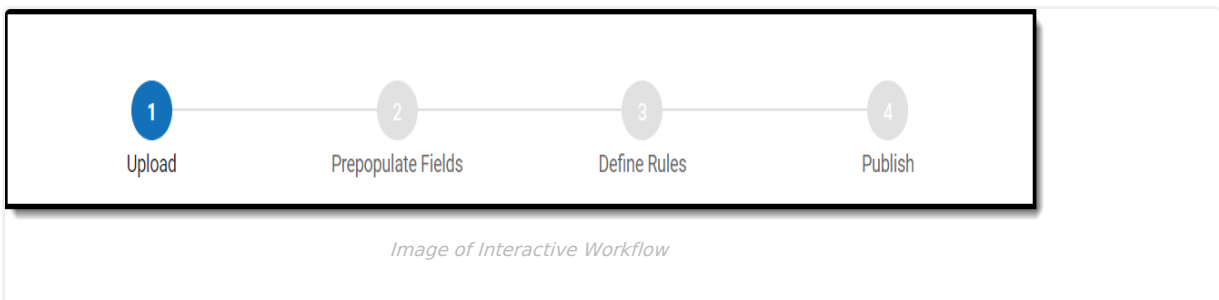
Once an interactive form is active, it is available for use to fill out for a person. Users can enter data directly into interactive forms from the person's Document's tool or Forms tool. Existing data from Campus can be pulled into the form.

Additional options for interactive forms include allowing the form to display 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.

Data entered into an interactive form does not modify any existing data in Campus fields. Existing data can be pulled onto the form, but existing data in Campus is not rewritten.

From the **Form Type** selection screen, select the **Interactive** form type and then click **Next**. Unlike the Interactive with Database Table form type, the Interactive type does not use the Configure Table step. The Upload, Prepopulate Fields, Define Rules, and Publish steps are the same for both interactive form types.

Note: hyperlinks are not supported.



Select a link to navigate to a step in the Interactive Form creation process:

1. [Upload](#)
2. [Prepopulate Fields](#)
3. [Define Rules](#)
4. [Publish](#)
5. [Preview Draft Forms](#)

[^ Back to Top](#)

Blank Form

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

From the **Form Type** selection screen, select the **Blank** form type and then click **Next**. The Blank Form upload screen displays.

Blank Form

Blank Forms are located in the Forms tool and in the outline under the module's Blank Forms folder.

Module *
The module cannot be modified after saving.

Counseling ▼

Name *
Limit 50 characters.

Notice of Team Meeting

PDF *
Max File Size: 4 MB

Select file...

📄 NOTICE OF TEAM MEETING.pdf ✕

Sequence
The sequence determines the order displayed in the Forms tool and in the outline under the module's Blank Forms folder.

5 ▲▼

Start Date *

07/01/2019 📅

End Date

month/day/year 📅

Status
The Status is calculated based on the Start and End Date.

ACTIVE

Uploaded By
Plainview Schools

Save
Cancel
↺↻

Blank Upload Screen

Field Name	Description
Module	<p>The module in which the form is available. Available modules include:</p> <ul style="list-style-type: none"> • Activity • Counseling • Health • PLP • Response to Intervention • Special Ed <p>See the Forms tool for additional information.</p>
Name	The name of the form as it displays in the custom forms list screen and the Forms tool.
PDF	<p>The name of the PDF file named by the user as the form was created in Adobe Acrobat Professional. Only PDF documents (.PDF) can be uploaded. Additional file types can be uploaded on an individual person's Forms tool or Documents tab.</p> <div style="background-color: #fff9c4; padding: 5px; border: 1px solid #ccc;"> <p>Only PDFs created using Adobe Acrobat Professional or Adobe DC are supported for Custom Form creation.</p> </div>
Sequence	The order in which the form displays in the custom forms list screen and in the Outline. Lower numbers appear higher on the list.
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. The end date can be on a past, current, or future date. This field can be left blank.
Status	The state of the form. The Status indicates if the form is Active, Inactive, or Draft. Status is calculated based on the Start and End date.
Uploaded By	The name of the user who uploaded the form. This is either the district name or Infinite Campus.

Blank Form Creation Process

1. Select the **Module** in which the form will be available.
2. Enter a **Name** for the form.
3. Click **Select File**.
4. Locate the PDF file then click **Open**.
5. Enter a **Sequence** number for the form. The arrows buttons can be used to select a sequence number.
6. Enter a **Start Date** for when the form becomes active.
7. *Optional:* enter an **End Date** for when the form becomes inactive.
8. Click **Save** when finished.

Once active, the Blank Form is available for users to print from the Forms tool. See the [Forms](#) tool for additional information.

[^ Back to Top](#)

Interactive Form and Interactive Form with Database Table Workflow

This section details each step of the Interactive and Interactive with Database Table workflow. The [Configure Table](#) step only applies to the Interactive with Database Table form type.

For Custom Forms with Database Tables, Time fields are NOT recommended and do not report correctly via Ad hoc.

Upload

The first step in the custom form creation process is to upload the PDF file and name the form.

Users can enter data directly into the form using the interface. Existing data from Campus can be prepopulated into the form using Ad hoc fields.

Module *
The module cannot be modified after saving.
Special Ed

Name *
Limit 50 characters.
Notice of Team Meeting 2020

PDF *
Max File Size: 4 MB
Select file...
NOTICE OF TEAM MEETING required.pdf

Display Custom Form on Portal

Campus Parent

Guardian eSignature Request

Guardian Fill out the Form

Campus Student

Student eSignature Request

Student Fill out the Form

Display PDF on Roster

Roster

Sequence
The order in which the form displays in the Custom Forms list and the list of Forms available to attach to a person.
55

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

Overflow
Allow users to type beyond the limited space in a multi-line text field. Text may overflow to subsequent pages when printing.

Comments
Enter any information regarding the uploaded form. Any information entered here is only visible from this tool. Limit 500 characters.

Instructions
Enter any instructions regarding this form. Instructions are visible for the user filling out the form for a person. Limit 500 characters.

Uploaded By
Plainview Schools

Interactive and Interactive with Database Table Upload Screen

Field	Description
Module	<p>The module in which the form is available. Available modules include:</p> <ul style="list-style-type: none"> • Activity • Counseling • Health • PLP • Response to Intervention • Special Ed <p>See the Forms tool for additional information.</p>

Field	Description
Name	The name of the form as it displays in the custom forms list screen and for the user filling out the form for a person on the Forms tool or Documents tab.
PDF	<p>The name of the PDF file named by the user as the form was created in Adobe Acrobat Professional. Only PDF documents (.PDF) can be uploaded. Additional file types can be uploaded on an individual person's Forms tool or Documents tab.</p> <p>Only PDFs created using Adobe Acrobat Professional or Adobe DC are supported for Custom Form creation.</p>
Display Custom Form on Portal	<p>When the form is attached to a student and locked, a read-only version of the Custom Form displays on the Campus Parent and/or Campus Student application.</p> <p>Three conditions must happen in order for a Custom Form to display on the portal:</p> <ol style="list-style-type: none"> 1. The Display Custom Form on Portal option is marked at System Administration > Custom Forms on the Upload step. 2. The Portal Preference is marked for the module the form is in at System Administration > Portal > Preferences > Display Options on the Documents section. <p>Portal preferences are set by school. See the Portal Preferences Display Options documentation for additional information.</p> <ol style="list-style-type: none"> 3. The Custom Form is attached to a student and locked (either on the Forms tool or the Documents tool). <p>See the Campus Parent Portal and Campus Student Portal documentation for additional information.</p> <p>Forms supports emancipated student functionality. Emancipated students will receive a form via the Parent Portal if it is marked to be sent to the Parent Portal. See the Emancipated Students documentation for information on setting up emancipated students.</p>
Guardian eSignature Request, Student eSignature Request	<p>When the Display Custom Form on Portal option and this option is marked, a request for signature is sent to the student and/or parent/guardian(s) on the Campus Parent and/or Campus Student application.</p> <p>Custom Forms with eSignature are not available on the Documents tool. Note: eSignature data cannot be queried in Ad hoc.</p> <p>Custom Form eSignature functionality does not require a PIN to complete.</p> <p>See the following documents for additional information:</p> <ul style="list-style-type: none"> • Campus Parent Portal • Campus Student Portal • Custom Forms on Portal Process
Guardian Fill out Form, Student Fill out Form	<p>When the Display Custom Form on Portal, eSignature, and this option is marked a request for data entry and signature is sent to the student and/or parent/guardian(s) on the Campus Parent and/or Campus Student application.</p> <p>See the Campus Parent Portal and Campus Student Portal documentation for additional information.</p>

Field	Description
Display PDF on Roster	<p>When the form is attached to a student, a PDF version of the Custom Form displays on the Roster.</p> <p>Three conditions must happen in order for a user to view a Custom Form on Roster:</p> <ol style="list-style-type: none"> 1. The user must have Read tool rights for Student Information > General > Forms > (Module) > Custom Forms OR Student Information > (Module) > General > Documents > Custom Forms, 2. The user must have Read tool rights for Scheduling > Section > Roster OR Campus Instruction > Roster > Roster, AND 3. The Custom Form is attached to a student and locked (either on the Forms tool or the Documents tool). <p>See the Roster (Section) documentation for additional information. See the Scheduling Tool Rights or the Campus Instruction Tool Rights documentation for additional information.</p>
Sequence	The order in which the form displays in the custom forms list screen and in the dropdown of forms available on the person's Forms tool or Documents tab. Lower numbers appear higher on the list.
Overflow	A checkbox that toggles the overflow functionality. When marked, users have the ability to input text into multi-line text fields beyond the limit of the field's space. Overflow text prints on subsequent pages.
Comments	<p>A text field used to enter text related to the form, such as when the form was last updated or which user uploaded the form. This text (limit 500 characters) can be used for any information regarding the uploaded file, but entered comments are only visible within this tool.</p> <div style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p>The following symbols cannot be saved into the text field:</p> <ul style="list-style-type: none"> • ampersand (&) • pound (#) • percent (%) </div>
Instructions	<p>A text field used to enter text instructions for the user attaching the form to a person's record. This text (limit 500 characters) appears when creating a new document for a person. It can contain instructions for use, specific rules for case managers, etc</p> <div style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p>The following symbols cannot be saved into the text field:</p> <ul style="list-style-type: none"> • ampersand (&) • pound (#) • percent (%) </div>
Form Count	<p>The number of instances of this form created for people in Campus.</p> <div style="background-color: #f8d7da; padding: 10px; border: 1px solid #ccc;"> <p>Custom Forms cannot be deleted if there are instances of the form associated to a person's record.</p> </div>
Uploaded By	The name of the user who uploaded the form. This is either the district name or Infinite Campus.

[^ Back to Top](#)

Prepopulate Fields

This is an optional step and can be completed at any time, even after a form is Active and attached to a person. The content of existing custom forms associated with a person does not change when an

Administrator changes Ad hoc mappings on the form in System Administration.

The Prepopulate Fields step is used to map Ad hoc fields that pull data from Campus into the form. This reduces the amount of data entry when a user fills out a form for a person. Not all fields need to be mapped.

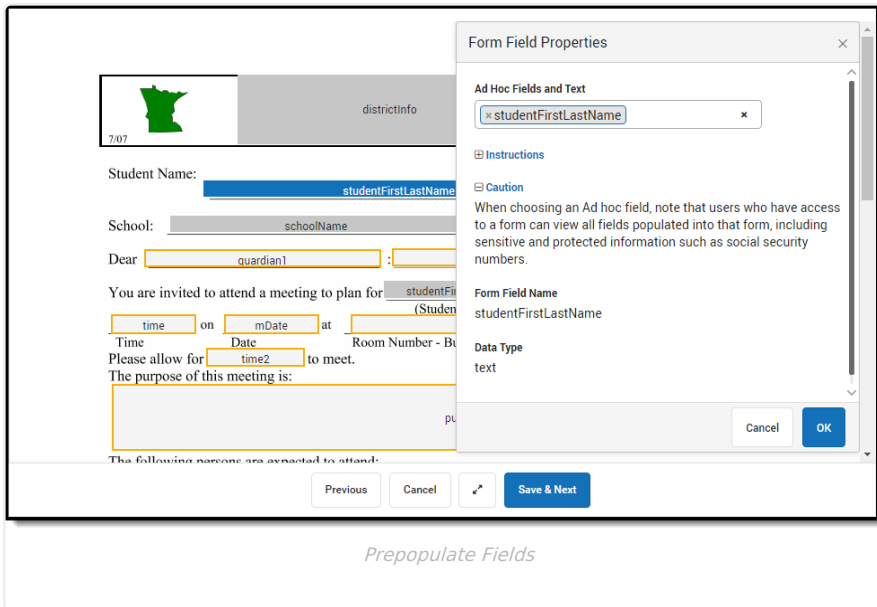
- [Field Sequence](#)
- [Map Date Fields](#)
- [Link Ad Hoc Fields](#)
- [Common Use Cases for Linking Ad Hoc Fields](#)

Users who have rights to a form are able to view all data that may be pulled into that form, regardless of whether they have rights to that data or the tool it comes from. For example, if an administrator maps behavior event information to a field in the form, any users of the form are able to see that information. This occurs even if they don't have rights to behavior tools. This includes social security numbers.

Click a field on the form to map it to a field in Campus. The Form Field Properties editor displays. Editable fields display in gray. Dark gray fields indicate that a mapped Ad hoc has already been mapped onto the form. Light gray fields with an orange/yellow border indicate that field does not have a mapped field name (See Image 9 below). Available field types include text fields, date fields, and number fields.

Keyboard shortcuts:

- Arrow keys: move between Ad hoc fields.
- Tab: move between fields in the interface. Tab does not navigate between form fields on the PDF.
- Enter: from mapping window, same as clicking OK or Cancel.

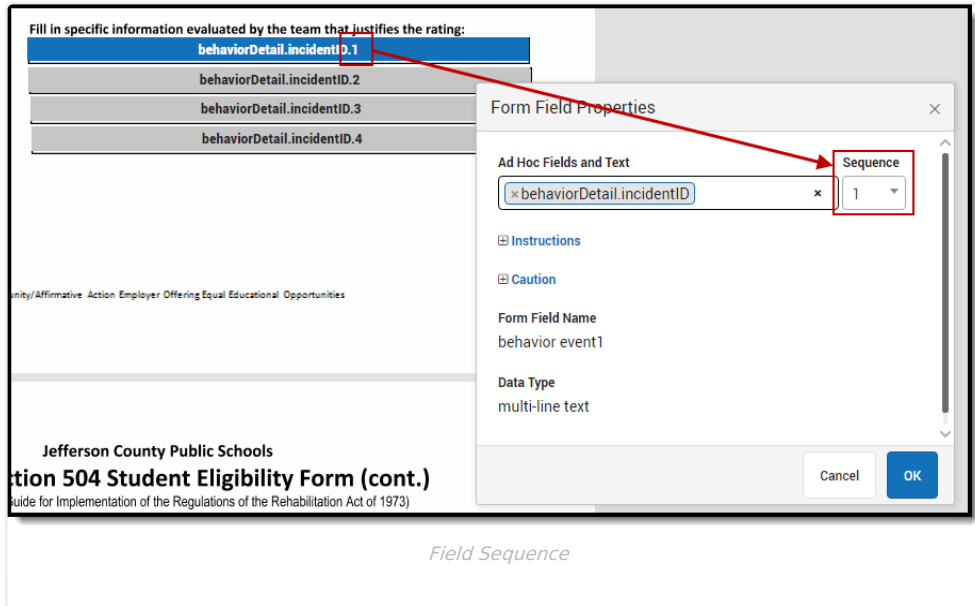


When mapping fields, enter search terms to narrow the list of fields. In addition to Ad hoc fields, the existing [Reserved Name List](#) is still available at the bottom of the dropdown list.

Online Registration (OLR) data is not available in Ad hoc and cannot be pulled directly into a Custom Form. Data must first be posted from online registration to custom fields on a custom tab and then mapped to fields on a Custom Form. See the [Online Registration](#) documentation for additional information.

Field Sequence

Ad hoc fields may be selected multiple times to prepopulate data from multiple records. For example, a form may list four behavior incidents. When mapping fields, select the appropriate **Sequence** for repeated fields, in this example 1-4 (see Image 10). If a student is involved in multiple behavior incidents, the sequencing of the Ad hoc fields can be used to order and pull the different behavior incidents when the form is added to the student's record. If sequencing is not used and all behavior incidents are given a 1 (one) sequence number, only one behavior event will be pulled onto the form.

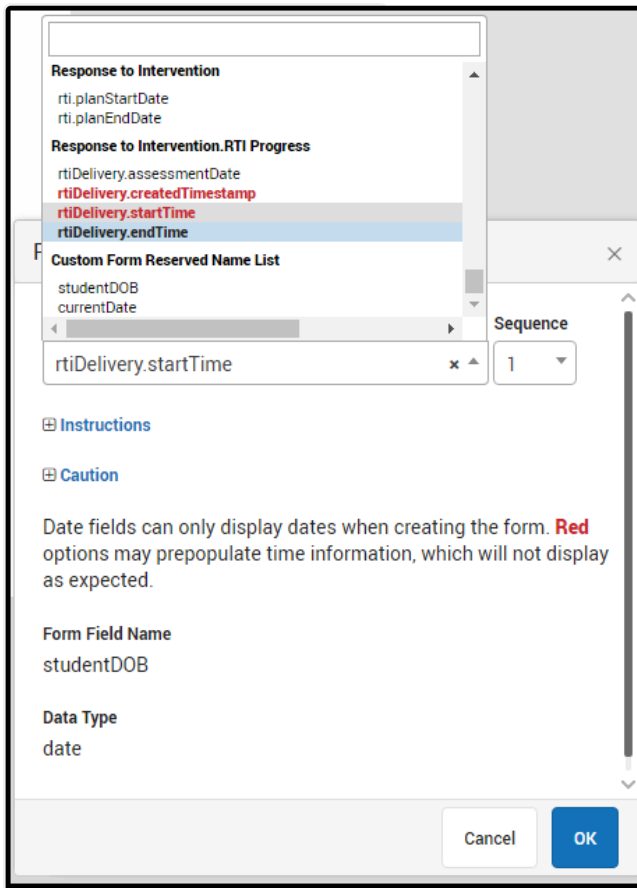


Map Date Fields

Form administrators have the ability to map date fields onto forms. Supported formats for date fields include:

- m/d/yy
- m/d/yyyy
- mm/dd/yy
- mm/dd/yyyy

When the form is uploaded, all date fields display in a mm/dd/yyyy format. Time is not supported. Selecting Ad hoc fields with a timestamp may not display as expected. When selecting date fields using the Form Field Properties editor, Ad hoc fields that contain timestamps are displayed in red (see Image 11 below). Only dates should be mapped to date fields.



Map Date Fields

[^ Back to Top](#)

Link Ad Hoc Fields

Ad hoc fields can be linked together, or combined, to pull related information into one field on forms. For example, a team member's name can be set up to pull both the first name and last name into the same field. This would look like [contacts.firstName] [<SPACE>] [contacts.lastName].1 (see Image 12 below).

At this time, combining Ad hoc fields can only be done during this step.

1. Type search terms to narrow the list of fields provided.
2. Select desired Ad Hoc field.
3. Type and select desired non-Ad hoc text between Ad Hoc fields (optional). Non-Ad hoc text can be words (the, and, etc.), symbols (comma, semicolon, colon, etc.), and/or spaces. When a user hits the space bar on the keyboard, the letters <SPACE> appear. In the completed document, this looks like a regular space.

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

4. Repeat steps 1-3 to include up to 10 (ten) Ad Hoc fields and non-Ad hoc text.

Once a linked phrase is entered on a form, that same phrase can be used again on the same form. In this

example, the same linked phrase is used to pull multiple contact persons' names onto the form by using the sequencing options (see Image 12).

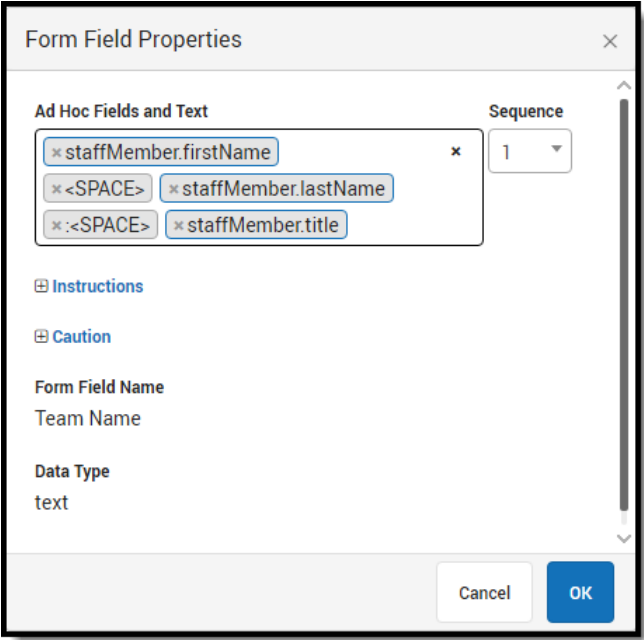
It is best practice to not link fields from multiple tables. See the [Ad Hoc documentation](#) for additional information on Ad Hoc.

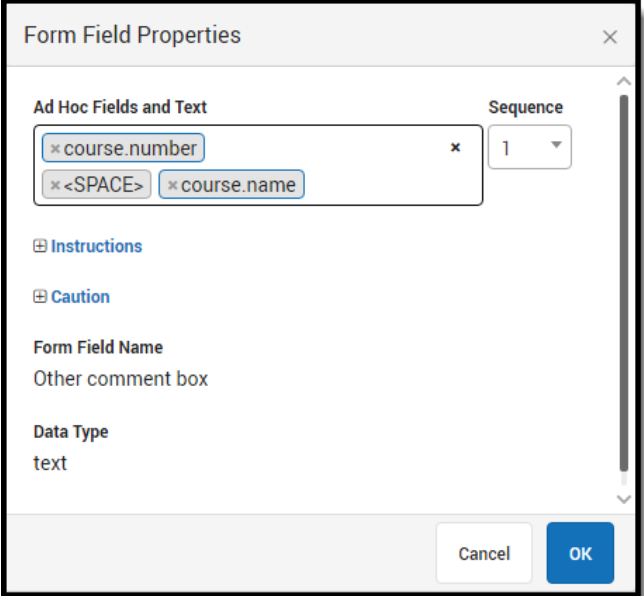
Link Ad Hoc Fields

[^ Back to Top](#)

Common Use Cases for Linking Ad Hoc Fields

Description	Example
<p>Weapon description and ID</p>	

Description	Example
<p>Staff Member Name and Title</p>	

Description	Example
<p>Course Name and Number</p>	

After all mappings are complete, click **Save & Next**. This step is optional and can be done at any time, even after the form has been activated.

[^ Back to Top](#)


Configure Table

This step only applies to the Interactive with Database Table form type. [Skip to the Define Rules](#) step to continue the process for creating an Interactive form.

The Configure Table step is used to define the table name, column names, and character limits for each field on the form. Once the form is published, the table is created, and the form becomes available for people to fill out. Any data entered into the form for a person can then be reported in Ad hoc.

Once the table is published, the table name, column names, and database limits cannot be edited. The

Configure Table step becomes read-only. Existing documents cannot be converted into an Interactive form with a database table.

The first step of the Database Table Designer displays information and instructions about how to use database table designer. Click the plus icons  to expand or hide this information.

The **Table Name** is the name of the table in the database. A suggested name for the table is prepopulated from the Name field on the Upload screen, but can be modified. Table names must be unique. Table names are not case-sensitive (Example: Form_AAA is the same as Form_aaa).

The screenshot shows the 'Interactive Form with Database Table - Student Eligibility Form with Database Table' interface. At the top, a progress bar indicates five steps: Upload, Prepopulate Fields, Configure Table (active), Define Rules, and Publish. The 'Form View' displays a form for 'Jefferson County Public Schools Section 504 Student Eligibility Form'. Fields include Student I.D No., Student's Name, Date of Birth, Name of Teacher(s), School, Grade, and Reason for Referral. A right-hand panel titled 'Database Table Designer' shows a 'Table Name' field with a red error icon and the text: 'The table name is not case-sensitive and must be unique. form.Form_ StudentEligibilityFormWithD'. Below this are expandable sections for 'Instructions' and 'About'. Navigation buttons at the bottom include '< Previous', 'Cancel', a refresh icon, and 'Save & Next >'. The caption below the screenshot reads 'Database Table Designer'.

[^ Back to Top](#)

Pagination

Each page of the PDF that contains fields displays as a tab in the table designer. Enter a name for the field as it displays in a column of an Ad hoc report and database limit for each field.

1 Error Database Table Designer

Table Name 1 Page 1

AD HOC NAME	DB TYPE 1	DB LIMIT	FIELD TYPE
<input style="width: 80%;" type="text"/>	varchar	1180	text, multi-line
studentFirstL	varchar	300	text
currentDate	date		date
schoolName	varchar	300	text
grade	varchar	300	text
studentDOB	date		date
contactsFirstI	varchar	300	text
contactsFirstI	varchar	300	text
studentFirstN	varchar	300	text
time	varchar	300	text
MDate	date		date
place	varchar	300	text
time2	varchar	300	text
purpose	varchar	2750	text, multi-line
guardian11	varchar	300	text

Database Pagination

Field Name	Description
Field Type	The type of field in the document. Options include: text, checkbox, dropdown, etc.
Ad Hoc Name	<p>The Name of the field as it appears as a column name in Ad hoc. Suggested values are prepopulated, but can be modified.</p> <div style="background-color: #fff9c4; padding: 5px; border: 1px solid #ccc; margin-top: 10px;"> <p>All column names must be named correctly before a table can be created. Providing appropriate and informative column names helps users locate the correct data when building reports in Ad hoc. Ad hoc names cannot contain symbols or spaces. Only letters, numbers, and underscores (_) can be used. Names must begin with a letter and have a minimum of two (2) characters.</p> </div>
DB Type	<p>Three database types are supported: text (varchar), number, and date. Most fields are text fields. Using date fields allows users to sort, calculate, and filter reports by date. Fields are configured when creating the PDF in Adobe Acrobat Professional, before uploading the form. Time fields are NOT recommended and do not report correctly via Ad hoc.</p> <div style="background-color: #fff9c4; padding: 5px; border: 1px solid #ccc; margin-top: 10px;"> <p>Only PDFs created using Adobe Acrobat Professional or Adobe DC are supported for Custom Form creation.</p> </div>

Field Name	Description
DB Limit	<p>The character limit in the database. This is the maximum allowable characters that can be entered and saved into the field. Suggested values are prepopulated based on the size of the field, but can be modified.</p> <p>Some values are set based on limits set for the field in Adobe Acrobat Professional, or on the limited values that can be entered, like checkboxes. These values cannot be modified. Valid values can be between 1-8000 or MAX. MAX is 1 GB of data.</p> <p>If the Overflow checkbox is marked, users will be able to enter up to the set DB Limit number of characters.</p>

After entering Ad hoc names and database limits for each field on the form, click **Save & Next**. A Draft of the table can be saved and this step in the process can be finished later.

Users are not able to advance to the **Publish** screen without naming all fields, establishing database limits, and fixing all errors. The number of errors displays at the top of the Database Table Designer. Clicking the number of errors navigates the user to the next error.

[^ Back to Top](#)

Define Rules

This is an optional step and can be completed at any time, even after a form is Active and attached to a person. If a form administrator changes the rules on a document already Active and attached to a person, these changes may cause the form to change status.

Form administrators can add rules to the form with the **Define Rules** step in the [workflow](#). When a user fills out the form for a person, they must adhere to the rules created on this screen.

For forms being sent to the Campus Parent and/or Campus Student Portal to be filled out, this screen is also used to define which user can fill out each field. By default, all fields are marked for Staff and Portal. These checkboxes only display for fillable forms on Portal.

Note: A single field should not be marked as both Staff Fill and Portal Fill, as this REQUIRES both a staff member and portal user to modify the field. If both options are marked and a staff member does not modify the field before sending the form to the Portal, the custom form will be in a Draft status.

Best practice is to only mark either Staff Fill OR Portal Fill per field, not both.

- [Add a New Rule](#)
- [Delete Rule](#)

The first screen when navigating to the Define Rules step is the **Field List**. The PDF displays on the left side of the screen and the Field List displays on the right. On the PDF, light gray fields with an orange/yellow border indicate that field does not have a rule defined. Dark gray fields indicate that a rule has already been defined for that field. On the Field List, all fields on the form display on the left column and the number of rules associated with that field display on the right column. The Staff and Portal checkboxes indicate which users can enter data into that field. Multiple rules can be created for one field.

Field	Staff	Portal	Rule
districtInfo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
studentFirstL...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1 RULE
currentdate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
schoolName	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
grade	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
studentDOB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
guardian1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Define Rules Field List

[Click here to expand...](#)

[^ Back to Top](#)

Add a New Rule

Select a field on the Field List or on the PDF to **add a new rule**. The Field Detail displays. The Field Detail displays the name of the field, the data type, the user(s) who can enter data into that field, and any rules already created for the field, if applicable.

Field Detail

Form Field Name
schoolName

Data Type
Text

Staff Fill
 Portal Fill

FIELD RULES
No defined rules.

Add Close

Field Details

Click **Add** to create a rule for the field. The **Rule Builder** displays. The Data Type of the field determines what type of rule can be created for the field. Available rules include:

- Required
- [Conditional Required](#)
- [Comparative Date Rules](#)
- [Comparative Number Rules](#)

Required rules can be added to any type of field on the PDF. Any user filling out the form for a person must enter information into a field that has been marked as required.

Rule Builder

Form Field Name
studentFirstLastName

Select Rule Option *
is required

Rule Description
"studentFirstLastName" is required

Update Cancel

Rule Builder - Required

Select the "is required" option from the **Select Rule Option** dropdown. The **Rule Description** at the bottom of the screen displays the rule in a complete sentence as it is being built. Verify the rule is correct and then click **Update**.

Conditional Required rules are required fields based on the selection of or data entered into another field. Select the "is required when" option from the **Select Rule Option** dropdown. Then **Select Another Field** that the first field is dependent on. The **Rule Description** at the bottom of the screen displays the rule in a complete sentence as it is being built. Verify the rule is correct and then click **Update**.

In the example below (Image 23), when the user marks the "Yes" military connection radio button (step 1), the Name field becomes required for them to fill out (step 2).

18-19 Military Connections

New for the 2018-2019 school year, the Department of Public Instruction is receiving information from Military Connected Families. If a parent or guardian is connected that they answer the following questions and indicate the Military Connected Individual's Date of Birth (DOB). Please disregard if this does not apply to your family. **Please return the form to your child's school by Friday, October 18, 2018.**

1 No, parent or guardian in this household is a member of the military.

2 Yes, this individual is a member of the military.

Name: Name: DOB:

Start Date of military service: Start Date End Date of military service: End Date of military service

Please indicate the following information about this service member Parent/Guardian.

What is the current status for this service member?

Rule Builder

Form Field Name
Name

Select Rule Option *
is required when

Select Another Field *
Military Connection (value) is filled

Rule Description
"Name" is required when "Military Connection (value: Yes)" is filled

Update Cancel

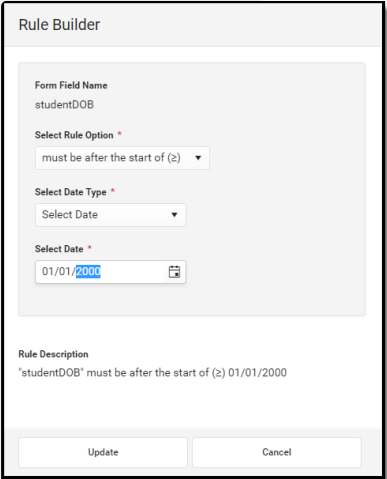
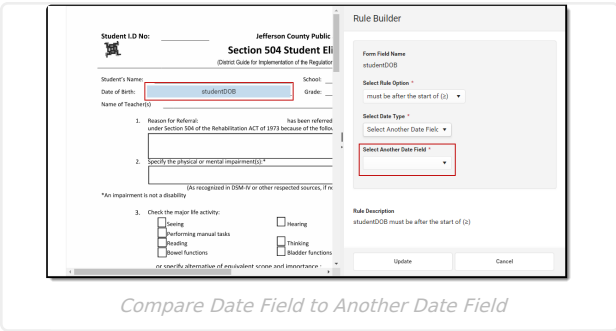
Conditional Required Example

Comparative Date Rules can only be applied to date fields. When a date field is selected, additional options display in the **Select Rule Option** dropdown on the Rule Builder. Date options include:

- must be the same day as (=)
- must be after the start of (\geq)
- must be after the end of ($>$)
- must be before the end of (\leq)

- must be before the start of (<)

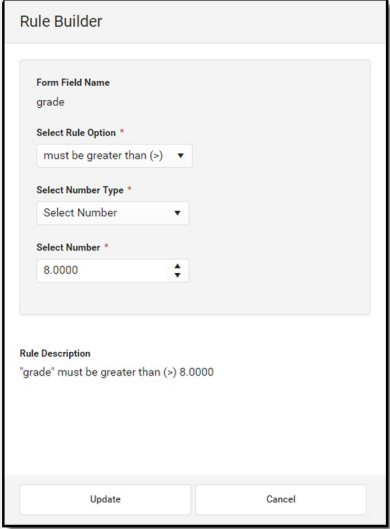
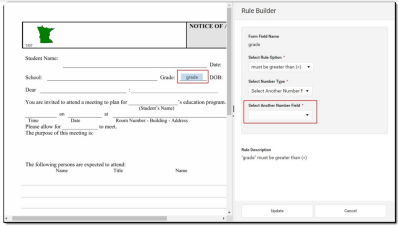
The **Select Date Type** field has two options. A date field can either be compared to a specific date entered or to another date field on the PDF.

Specific Date	Another Date Field
<p>To compare a date field to a specific date:</p> <ol style="list-style-type: none"> 1. Choose a date rule option from the Select Rule Option dropdown. 2. Choose the "Select Date" option from the Select Date Type dropdown. 3. Either enter a date into the Select Date field or click the Calendar button next to the Select Date field and choose a date. 4. The Rule Description at the bottom of the screen displays the rule in a complete sentence as it is being built. Verify the rule is correct and then click Update.  <p><i>Compare Date Field to an Entered Date</i></p>	<p>To compare a date field to another date field on the PDF:</p> <ol style="list-style-type: none"> 1. Choose a date rule option from the Select Rule Option dropdown. 2. Choose the "Select Another Date Field" option from the Select Date Type dropdown. 3. Either choose another date field from the Select Another Date Field dropdown or choose another date field from the PDF. When selecting another date field, only date fields display on the PDF (see Image 25 below). 4. The Rule Description at the bottom of the screen displays the rule in a complete sentence as it is being built. Verify the rule is correct and then click Update.  <p><i>Compare Date Field to Another Date Field</i></p>

Comparative Number Rules can only be applied to Number fields. When a number field is selected, additional options display in the **Select Rule Option** dropdown on the Rule Builder. Number options include:

- must be equal to (=)
- must be greater than or equal to (\geq)
- must be greater than (>)
- must be less than or equal to (\leq)
- must be less than (<)

The **Select Number Type** field has two options. A number field can either be compared to a number entered or to another number field on the PDF.

Specific Number	Another Number Field
<p>To compare a number field to a specific number:</p> <ol style="list-style-type: none"> 1. Choose a number rule option from the Select Rule Option dropdown. 2. Choose the "Select Number" option from the Select Number Type dropdown. 3. Either enter a number into the Select Date field or use the arrow buttons next to the Select Number field and choose a number. 4. The Rule Description at the bottom of the screen displays the rule in a complete sentence as it is being built. Verify the rule is correct and then click Update.  <p style="text-align: center;"><i>Compare Number Field to an Entered Number</i></p>	<p>To compare a number field to another number field on the PDF:</p> <ol style="list-style-type: none"> 1. Choose a number rule option from the Select Rule Option dropdown. 2. Choose the "Select Another Number Field" option from the Select Number Type dropdown. 3. Either choose another number field from the Select Another Number Field dropdown or choose another number field from the PDF. When selecting another number field, only number fields display on the PDF (see Image 27 below). 4. The Rule Description at the bottom of the screen displays the rule in a complete sentence as it is being built. Verify the rule is correct and then click Update.  <p style="text-align: center;"><i>Compare Number Field to Another Number Field</i></p>

Once a rule has been created for a field, the rule can be viewed by navigating to the Field Detail.

[^ Back to Top](#)

Delete Rule

To remove a rule from a field, click on the rule from the Field Detail screen. The **Rule Detail** displays. Click **Remove** to delete the rule.

Rule Detail

"studentFirstLastName" is required

Remove
Close

Rule Detail

Click **Save & Next** to navigate to the [Publish](#) step once all rule setup is complete.

[^ Back to Top](#)

Publish

Publishing an interactive form makes the form available for use to fill out for a person. See the [Forms](#) tool for additional information.

Publishing an interactive form with a database table creates a database table. The table name, column names, and database limits cannot be edited and the Configure Table step becomes read-only. When this form is active and associated with a person, the data entered into the form is available in Ad hoc for reporting. See the [Custom Forms in Ad hoc](#) section for additional information.

Before publishing, users can preview Custom Forms to test Ad hoc mapping, database limits, and rules. See the [Preview Draft Forms](#) sections for additional information.

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

Start Date *

End Date

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

Publish

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. The end date can be on a past, current, or future date. This field can be left blank.

Field	Description
Status	<p>The state of the form. This is calculated based on the Start and End date.</p> <p>Deactivating a form removes the form from the user's custom form selection list. Existing forms can still be edited and/or copied even if the form is deactivated.</p>

[^ Back to Top](#)

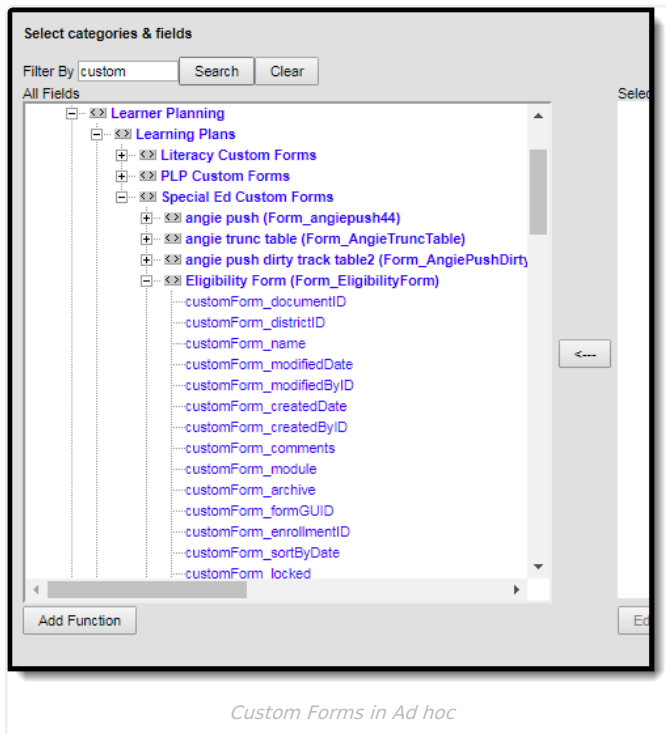
Custom Forms in Ad hoc

Classic View: Ad Hoc Reporting > Filter Designer > Query Workflow/Student > Search: Custom

Search Terms: Filter Designer

This information only applies to the Interactive with Database Table form type.

Once a table has been published, those fields become available in Ad hoc. See the [Ad hoc documentation](#) for more information.



The first section of fields include form identifications fields:

customForm_documentID
 customForm_districtID
 customForm_name
 customForm_modifiedDate
 customForm_modifiedByID
 customForm_createdDate
 customForm_createdByID
 customForm_comments
 customForm_module

customForm_archive
 customForm_formGUID
 customForm_enrollmentID
 customForm_sortByDate
 customForm_locked
 customForm_personName
 customForm_formDocName

All fillable fields on the form are listed after the identification fields. All items in the list are available for creating reports.

[^ Back to Top](#)

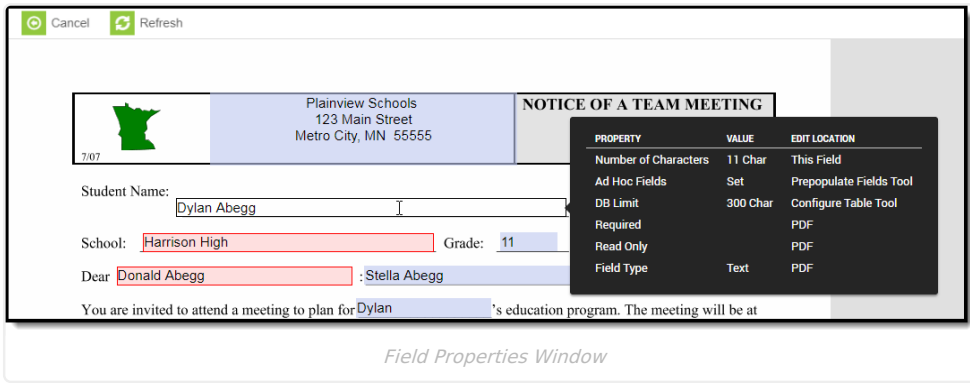
Preview Draft Forms

Users have the ability to 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 the form is published. See the [Tool Rights \(Custom Forms\)](#) document for additional information.

Any information entered on the form is only for testing purposes and is not saved to the person's record.

Preview Draft Forms Process

Documents Tool	Forms Tool
<p>1. Navigate to Student Information > Module > General > Documents > Create New Document/Plan. The Create New Document Wizard displays.</p> <div data-bbox="255 1160 879 1473" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> </div> <p style="text-align: center; color: #808080;"><i>Preview Draft Custom Forms Selection</i></p> <p>Select the Preview Custom Form in Draft Status checkbox.</p> <p>3. Choose the form from the Select a Form... dropdown.</p> <p>4. Click the Create Document button.</p> <p>5. If data selection is applicable on the form, select the prepopulated data for the person. See the Documents tool documentation for additional information on selecting prepopulated data for custom forms.</p> <p>6. Click the Preview Form button. The draft custom form displays.</p> <p>7. Hover over or click a fillable field on the custom form. A field properties window displays.</p>	<p>1. Navigate to Student Information > General > Forms. The Forms List Screen displays.</p> <p>2. Click the New button dropdown and select the Preview Unpublished Forms option.</p> <div data-bbox="975 1189 1430 1424" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> </div> <p style="text-align: center; color: #808080;"><i>Preview Unpublished Forms</i></p> <p>3. Choose the form from the Select Form to Preview screen.</p> <p>4. If data selection is applicable on the form, select the prepopulated data for the person. See the Documents tool documentation for additional information on selecting prepopulated data for custom forms.</p> <p>5. Click the Preview Form button. The draft custom form displays.</p> <p>6. Hover over or click a fillable field on the custom form. A field properties window displays.</p>



Recommended: Open the Custom Forms module and the Preview screen in two separate browser windows or tabs. 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.

The **Property** lists the properties associated with the particular field. The **Value** provides information pertaining to the property. The **Edit Location** indicates where this field property can be edited.

Field Property	Description
Number of Characters	The entered value.
Ad Hoc Fields	Indicates an Ad hoc field has been mapped to pull information from the person's record.
DB Limit	Indicates the maximum allowable characters that could be entered into the field.
Required	Indicates this field must be filled out. This indicator is for Required fields set up in Adobe Acrobat Professional. If users click Save & Next on the Define Rules screen, this indicator is removed. See the Define Rules section for additional information.
Rules	Indicates if a rule is created for this field, including required fields.
Read Only	Indicates this field cannot be edited.
Overflow	Indicates this field has the overflow functionality.
Field Type	Indicates if the field is a text, date, or number field.

[^ Back to Top](#)

Reserved Name List

Campus does not recommend using the Reserved Name List to map prepopulated fields.

Student Information Fields	Notes
stateID	

Student Information Fields	Notes
studentID	
studentName	Displays Last Name, First Name Middle Name
studentFirstLastName	Displays First Name, Middle Name Last Name
studentFirstName	
studentLastName	
studentMiddleName	
studentDOB	This field will map to a date field.
grade	
studentGender	
studentAge	
studentHomePhone	
studentAddress1	
studentAddress2	
Guardian Fields	
guardian1Name	Displays Last Name, First Name, Middle Name
guardian1FirstLastName	Displays First Name Middle Name Last Name
guardian1LastName	
guardian1FirstName	
guardian1MiddleName	
guardian1WorkPhone	
guardian1Relationship	
guardian1HomePhone	
guardian1Address1	
guardian1Address2	
guardian2Name	Displays Last Name, First Name, Middle Name
guardian2FirstLastName	Displays First Name Middle Name Last Name
guardian2LastName	
guardian2FirstName	
guardian2MiddleName	
guardian2WorkPhone	
guardian2Relationship	
guardian2HomePhone	
guardian2Address1	
guardian2Address2	
School/District Information	

Student Information Fields	Notes
districtInfo	
districtName	
districtAddress1	
districtAddress2	
districtPhone	
schoolName	
schoolAddress1	
schoolAddress2	
schoolPhone	
currentDate	This field will map to a date field.
user	Displays the user's full name
username	
tmName1-tmName12	tm = Team Member
tmTitle1-tmTitle12	tm = Team Member
caseManager	
caseManagerTitle	
caseManagerPhone	

[^ Back to Top](#)