

Custom Tool Setup

Last Modified on 10/21/2024 8:20 am CDT

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Tool Search: Custom Tool Setup

Custom Tool Setup allows you to create custom tools for tracking local or state-level information. You can also use this tool to embed hyperlinks to appear as a tool within the Infinite Campus navigation and have these links open in a new tab or within the workspace.

Custom tools are district-wide, but information can be displayed or hidden from users through the assignment of tool rights. Custom tools can also be added to the Parent and Student Portals. Tools created at the state level can be published down to DIS-linked districts and these tools can only be modified or deleted by the state.

Custom Tool Setup ☆ System Settings > Custom Data and Links > Custom Tool Setup

Custom Tool Editor

The Custom Tool Editor allows users to create custom data objects for tracking local or state-level information as well as custom shortcut links which can be added to the main menu.

1 - 8 of 8 items

Tool Name ↑	Classic Look Menu Placement	New Look Menu Placements	Tool Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Additional District Info	Custom Links and Reports		URL Link
Policies	Campus Community		URL Link
District Roster	Home	Instruction > Students	URL Link
Zip Codes	Home		URL Link
Certifications	Home		URL Link
Bus Routes	Zip Codes		URL Link
Locker Zones	Custom Links and Reports	My Account > My Data	URL Link
Parent Outreach	State Programs		Single Screen Editor

1 - 8 of 8 items

[New Custom Tool](#)

Read - View existing custom tools.

Write -Edit existing custom tools.

Add -Create new custom tools.

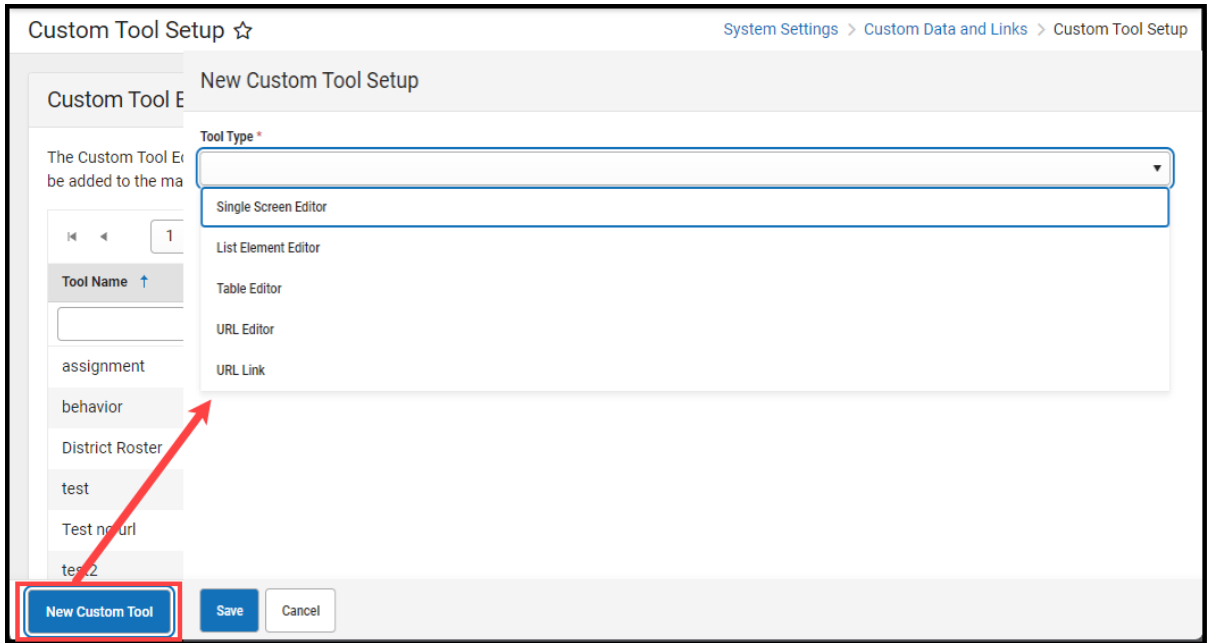
Delete - Delete existing custom tools.

For more information about Tool Rights and how they function, see the [Tool Rights](#) article.

Step 1. Create a Custom Tool

1. To create a new custom tool, select the **New Custom Tool** button. The New Custom Tool

Setup editor will appear on the left.



2. Select the **Tool Type**. See the table below for more information about each option:

<p>Single Screen Editor</p>	<p>▶ Click here to expand...</p> <p>The Single Screen Editor is used to collect a single set of data that will only have one record. If data needs to be historical and referenced over the school year, the Single Screen Editor option cannot be used.</p> <p>This tool type can be placed in any of the available custom tool locations.</p>
<p>List Element Editor</p>	<p>▶ Click here to expand...</p> <p>The List Element Editor option holds multiple sets of data and will track information over a period of time (multiple records). The user can choose which type of record to post a value for, unlike the table editor, where only the same type of data is available. A Status Date is required for each record.</p> <p>The tool type is not available for placement in District Information or School.</p>

<p>Table Editor</p>	<p>▶ Click here to expand...</p> <p>The Table Editor option holds lists of associated values to be displayed for the same record, such as totals. Unlike the list editor, there is only one type of record created, for which multiple values may display.</p> <p>This option uses a date and time field to track entries. Only one entry for any given time is allowed, meaning two entries with the time of 10:10 AM cannot be saved.</p> <p>This tool type can be placed in any of the available custom tool locations.</p>
<p>URL Editor</p>	<p>▶ Click here to expand...</p> <p>The URL Editor option allows you to insert an external website as a selectable tool within the Infinite Campus navigation structure and control whether this website opens in a new tab or within the workspace (an area within the Infinite Campus product itself). <u>Unlike the URL Link option, this option can be designated to be available for only students or all people.</u></p> <p>The Target field designates if the URL is opened in a new browser tab or within the workspace (keeping you within Infinite Campus).</p> <div data-bbox="491 1055 1430 1223" style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p>Websites with a Content Security Policy that prohibits the use of their site within other sites will prevent the page from appearing (i.e., google.com, amazon.com, etc)</p> </div> <p>The Pass User Session field is used for auto-authentication for other external sites (especially for custom reporting). The following describes each option:</p> <ul style="list-style-type: none"> ◦ None - This option is used for inserting links when no Campus user sessions are passed to the link. If authentication is required, the user will be required to login each time he/she visits. ◦ Send username, calendar, personID as plain text params - Indicates these elements will be used to authenticate the user into the link's site. This includes the personID, userID, username, calendarID, sectionID, contextID and contextIDType elements. ◦ Encrypt URL-encoded username, password, etc. - Indicates that the credentials for logging a user into Campus should also be used to log the user in to the link's site. The parameters added to the URL include personID, userID, username, password, calendarID, sectionID, contextID, contextIDType and timeStamp. <p>Parameters referenced in the Send username, calendar, personID as plain text params and Encrypt URL-encoded username, password etc options are defined as follows:</p>

- **personID** - The personID of the currently logged-in user
- **userID** - The userID of the currently logged-in user
- **username** - The username of the currently logged-in user
- **calendarID** - The calendarID of the currently selected calendar.
- **sectionID** - This sectionID pertains to the sectionID most recently selected in Instruction.
- **contextIDType** - The most recently selected context type: personID if you most recently viewed a person, sectionID if you most recently viewed a section in a tool other than Instruction, userID if you most recently viewed a User Account.
- **contextID** - The ID value of that most recently selected context type. Corresponds to contextIDType. Either a personID value, sectionID value, or userID value

External URLs are automatically added to your [Content Security Policy](#). If a custom tab is later deleted, the associated URL is automatically removed from the district's Content Security Policy.

URL Link

▶ [Click here to expand...](#)

The URL Link option allows you to insert an external website as a selectable tool within the Infinite Campus navigation structure and control whether this website opens in a new tab or within the workspace (an area within the Infinite Campus product itself).

The **Target** field designates if the URL is opened in a new browser tab or within the workspace (keeping you within Infinite Campus).

Websites with a Content Security Policy that prohibits the use of their site within other sites will prevent the page from appearing (i.e., google.com, amazon.com, etc)

The **Code** is the alias/tooltip that appears when the user hovers the mouse over the link.

The **Pass User Session** field is used for auto-authentication for other external sites (especially for custom reporting). The following describes each option:

- **None** - This option is used for inserting links when no Campus user sessions are passed to the link. If authentication is required, the user will be required to login each time he/she visits.
- **Send username, calendar, personID as plain text params** - Indicates these elements will be used to authenticate the user into the link's site. This includes the personID, userID, username, calendarID, sectionID, contextID and contextIDType elements.
- **Encrypt URL-encoded username, password, etc.** - Indicates

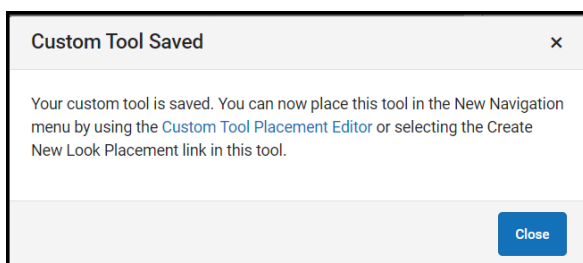
that the credentials for logging a user into Campus should also be used to log the user in to the link's site. The parameters added to the URL include personID, userID, username, password, calendarID, sectionID, contextID, and contextIDType.

Parameters referenced in the **Send username, calendar, personID as plain text params** and **Encrypt URL-encoded username, password etc** options are defined as follows:

- **personID** - The personID of the currently logged-in user
- **userID** - The userID of the currently logged-in user
- **username** - The username of the currently logged-in user
- **calendarID** - The calendarID of the currently selected calendar.
- **sectionID** - This sectionID pertains to the sectionID most recently selected in Instruction.
- **contextIDType** - The most recently selected context type: personID if you most recently viewed a person, sectionID if you most recently viewed a section in a tool other than Instruction, userID if you most recently viewed a User Account.
- **contextID** - The ID value of that most recently selected context type. Corresponds to contextIDType. Either a personID value, sectionID value, or userID value

External URLs are automatically added to your [Content Security Policy](#). If a custom tab is later deleted, the associated URL is automatically removed from the district's Content Security Policy

3. Fill out the editor which will vary depending on the Tool Type selected.
4. Select the **Classic Look Menu Placement**. This is where the custom tool/URL will appear within Classic Campus.
5. Once the editor has been filled out, click **Save**. The custom tool is now saved and you will be asked to select now where in the New Look of Infinite Campus the tool should live.



6. Click the **Custom Tool Placement Editor** hyperlink in the message show above or click the **Create New Look Menu Placement** hyperlink (see image below). Select the **Menu Item** and **Category** where this new custom tool will appear for users and click **Save**.

New Custom Tool Setup

Tool Type *

Search Option *

Tool Name *

Classic Look Menu Placement *

New Look Menu Placements
 No Existing Placements

Create Tool Mapping

Selected Tool
 Additional District Info

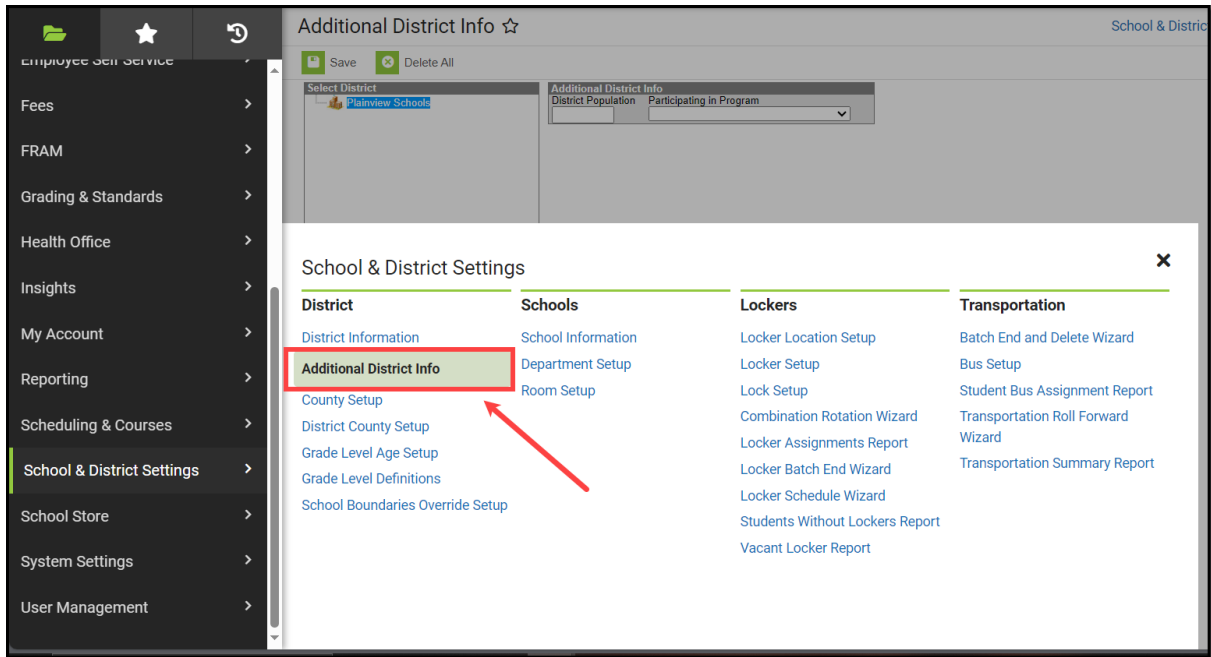
Description

Menu Item *

Category *

Sort Name (Optional)

Once saved, the tool will now appear in its designated area. For example, in the image above, the Additional District Info custom tool was assigned to School & District Settings > District and now appears in this category for all users (see below).

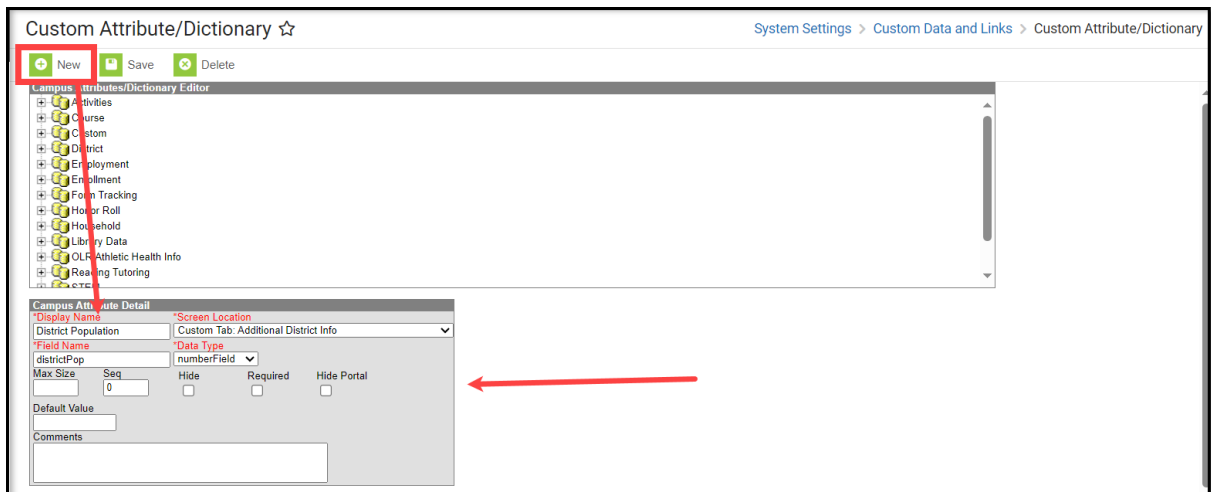


7. If you created a URL Editor or URL Link, you are finished and users can now access this link within Infinite Campus. If you created a tool, move onto Step 2 below.

Step 2. Define Custom Tool Attributes

Now that your custom tool has been created, custom attributes need to be added so you can designate what fields are in this tool and what information you will gather.

1. Navigate to the [Custom Attribute/Dictionary](#) tool.
2. Click the **New** icon. The Campus Attribute Detail editor will appear below.



3. Enter the **Display Name** of the field you would like to add. This is the name which appears in the UI for the field.
4. Select the **Screen Location**. This is where you would select the custom tool you just created. For example, the Additional District Info tool is selected since it was created in previous

steps.

5. Enter the **Field Name**. This is the name used to identify the field in the database.
6. Select the **Data Type**. This determines the type of field presented to users. See the table below for more information.

Data Type	Details
textBox	Creates a text box. Users are allowed to enter up to 255 alphanumeric and special characters.
drop-down list	Creates a dropdown list. Limited to 15 alphanumeric characters.
dataField	Creates a date field. Users must enter the date in MM/DD/YYYY, MM-DD-YY or MMDDYY format.
numberField	Creates a number field. Only numeric characters (no decimals) are allowed. Max default value is 10.
floatField	Creates a float field. Only numeric characters are allowed with one decimal point. Max default value is 10. The value can be without a decimal point. If the default value has a decimal, only 2 numbers to the right of the decimal are allowed.
timeField	Creates a time field. Users must enter values in HH:MM AM/PM or HH:MM military time. Values should include a semicolon.
ssnField	Creates a field for Social Security Number input. Users must enter a number pattern of XXX-XX-XXXX where X = a numeric value between 0-9. Dashes should be included when entering Social Security Numbers. 11 characters total (this includes the dashes between numbers).
phoneField	Creates a field for entering phone numbers. Users should enter phone values in (999)999-9999 or (999)999-9999x9999 format where: <ul style="list-style-type: none"> ◦ 9 = a numeric value between 0-9 ◦ x = the delimiter for entering an extension number

Data Type	Details
emailField	<p>Creates a field for entering an email address.</p> <p>Users must enter email addresses in XXXXX@XXX.XXX where:</p> <ul style="list-style-type: none"> ◦ X = any alphanumeric or special characters ◦ Users may enter multiple periods ◦ Number of total characters does not surpass 100 ◦ @ is required
moneyField	<p>Creates a field for entering a monetary value.</p> <p>Users must enter a value between 0-9. One decimal point is allowed but only two numbers right of the decimal point is allowed. Values entered can contain the \$ special character but is not required.</p>
checkBox	Creates a checkbox.

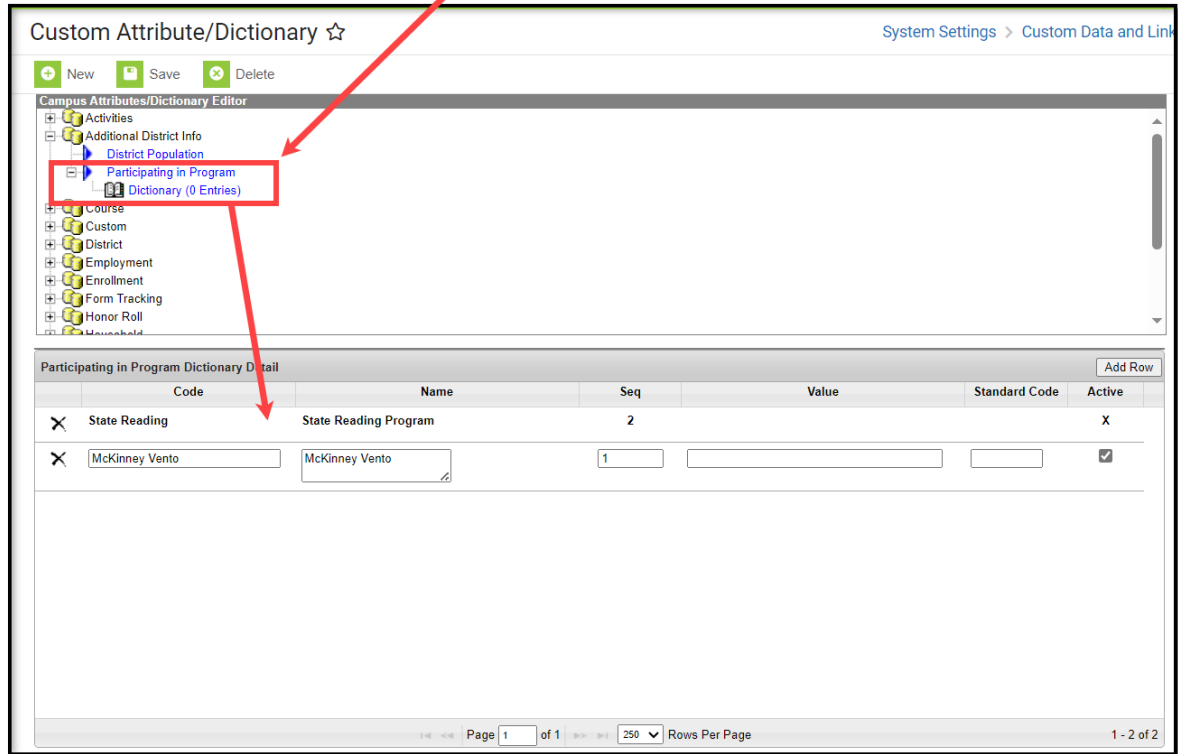
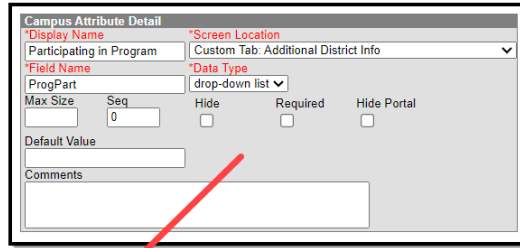
7. Enter any additional information, see the table below for more information about these fields.

Fields	Description
Default Value	<p>The default value which auto-populates in the field when a new record is created.</p> <div style="background-color: #fff9c4; padding: 5px; margin-top: 10px;"> <p>Note that default values are NOT saved in the database tables.</p> </div>
Max Size	The maximum number of characters allowed for entry in the field.
Seq	<p>The order of the field within the tool.</p> <p>For example, Field A has a seq of 1 and Field B has a Seq of 2. Field 1 will be listed first followed by Field 2.</p> <p>If no sequence is indicated, fields display in numeric or alphabetic order.</p>
Required	If marked, this checkbox indicates the field must be filled out (or checked) in order for the user to be able to save a record for the custom tool. The field name displays as red text (instead of black) and is followed by an asterisk (*) to indicate that it is required.

Fields	Description
Copies Forward	<p>When marked, the data associated with the attribute is copied forward into the calendar for the next school year.</p> <p>This option applies to things that are cloned or rolled forward from year to year. For example, calendars are copied from one year to the next, courses are copied forward, enrollments are copied forward.</p> <p>People are not tied to a calendar, therefore attributes associated with people are not copied forward, even when this checkbox is marked.</p> <div style="background-color: #fff9c4; padding: 5px; border: 1px solid #ccc;"> <p>This option is not available for data fields assigned to a custom tab.</p> </div>
Hide Portal	<p>If marked, this checkbox indicates the custom field will not be displayed in the Student or Parent Portal.</p> <p>This field does not apply or appear to state-level users.</p>
Comments	<p>Any comments related to the custom field. These comments do not display for users interacting with the field.</p>

8. Click **Save**. The field has now been added to your custom tool.
9. If the field you added to your custom tool requires values for selection, such as a dropdown field, locate and select the field in the list at the top of the screen.

For example, in the image below, a dropdown list called Participating in Program was added to the Additional District Info custom tool. The tool was located in the list and the Dictionary link was selected, opening an editor at the bottom of the screen where field values can be entered.

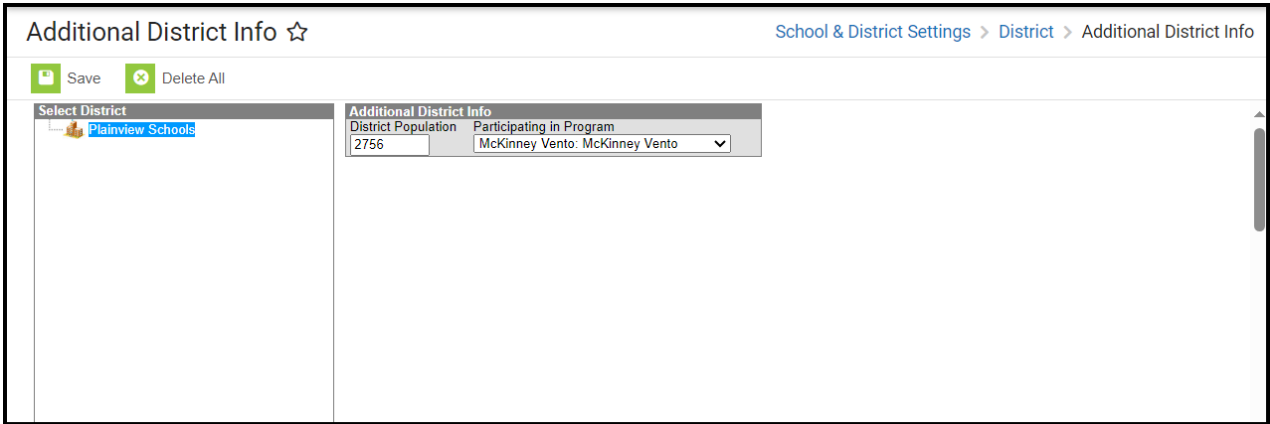


10. Enter all field values needed and once finished, click **Save**. Your custom field is now available in your custom tool and values are available within this field.
11. Repeat steps 1-10 until all fields have been added to the tool. Once all fields and field values have been entered, move on to Step 3 below.

Step 3. Add Data to the Custom Tool

Once your custom tool has been created, fields have been added, and attributes have been added to fields, you are now ready to add data to your custom tool.


For example, in the image below, the user navigated to the Additional District Info tool created in the steps above and entered data within the added fields.



Step 4. Publish the Tool to Districts - State Edition Only

For users in a State Edition of Infinite Campus, you can publish custom tools and links down to DIS-linked districts.

To do this:

1. Navigate to the [Publish Custom Tool](#).
2. Select your custom tool in the Custom Tool List. In the example below, the Additional District Info tool is selected.
3. Select the **Tool Status**:
 - If set to active, the tool will appear as available to DIS-linked districts once you complete the publish process.
 - If set to Inactive/Visible the tool will still appear for district users but will not available for use.
 - If set Inactive/Hidden the tool will not appear nor be available for any district users.
4. Determine which districts will receive the tool by selecting an **Ad Hoc Filter** or selecting a district in the Unselected Districts window and clicking the  button.
5. Click **Publish**. The tool has now been published to DIS-linked districts in the Classic View and New Look locations defined for the custom tool.

Publish Custom Tool ☆ System Settings > Custom Data and Links > Publish Custom Tool

Publish
 Un-publish
 View Publish History

Published	Name
<input checked="" type="checkbox"/>	TAMMY
<input checked="" type="checkbox"/>	Additional District Info
<input checked="" type="checkbox"/>	ew test2
<input checked="" type="checkbox"/>	aaa st

Tool Published ⚠ Attributes or Placements Changed, Re-publish

Publish button = Publish (push down) Custom Tool/Placements and Attributes to Selected Districts
 To Un-Publish a Custom Tool for a single district remove that district from the Selected District section and select the Publish button

Un-Publish button = Remove a Custom Tool/Placements and Attributes from ALL districts where Custom Tool has been published

Publish Custom Tool Detail

*Select Tool Status

Published By: Published Date: Count of published districts: 0

Select Districts to Receive Tool:

Ad Hoc Filter District Ad Hoc Filter: none selected

District Selection

Unselected Districts

- Bozeman Public Schools
- Butte Public Schools
- North Star Public School

Selected Districts

--->

Once a tool is published, a checkmark will appear in the **Published** column in this tool as well as within the Custom Tool Setup tool.

Publish Custom Tool ☆ System Settings > Custom Data and Links > Publish Custom Tool

Published	Name
<input checked="" type="checkbox"/>	TAMMY
<input checked="" type="checkbox"/>	Additional District Info
<input checked="" type="checkbox"/>	ew test2
<input checked="" type="checkbox"/>	aaa st

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Custom Tool Setup ☆ System Settings > Custom Data and Links > Custom Tool Setup

Custom Tool Editor

The Custom Tool Editor allows users to create custom data objects for tracking local or state-level information as well as custom shortcut links which can be added to the main menu.

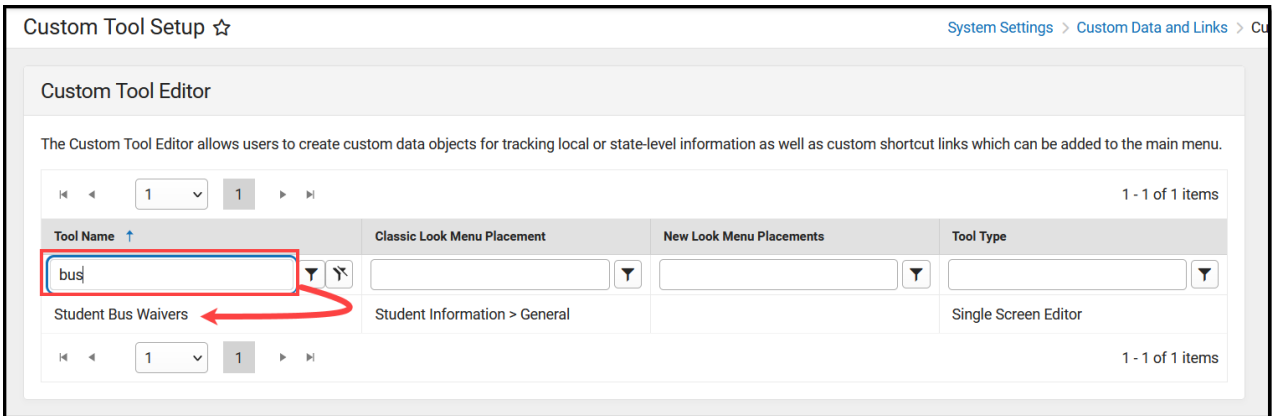
1 - 10 of 10 items


Published	Tool Name ↑	Classic Look Menu Placement	New Look Menu Placements	Tool Type
	aaa st	Student Information > General		Table Editor
<input checked="" type="checkbox"/>	Additional District Info	Student Information > General	Student Information > General Student Administration	List Element Editor
	Custom outline link	Home		URL Link
<input checked="" type="checkbox"/>	ew test2	Student Information > General	Student Information > General	Table Editor
	Jens Custom tab	District Information		Table Editor
<input checked="" type="checkbox"/>	Mary Custom Tab	Student Information > General		List Element Editor
	mw pub test	Student Information > General		URL Editor

Review and Modify Existing Custom Tools/Links

You can quickly locate an existing tool or link by utilizing the search fields at the top of each column of the Custom Tool Editor. These search fields dynamically filter results, meaning as you continue to enter characters, the list of tools/links continues to get refined to match what is entered.

For example in the image below, entering 'bus' in the Tool Name search field narrowed the results to just the Student Bus Waivers tool.



Each column also provides filtering options which can be applied to entered search text clicking the  icon and selecting a filter parameter.

