Summer Academy 2017
Custom Forms

You can create Custom Forms to collect Human Resources and employee-related data that is not already being captured elsewhere in Skyward's School Management System.

Custom Forms provide a way to create and define your own unique area to enter, collect, and display data and then report on that data. You can design these unique areas to mimic the look and feel of existing paper forms currently in use by your district.

You can create and use Custom Forms in the Employee Profile area of Human Resources in Skyward's School Management System. Forms created in Human Resources are attached to individual employees. District staff can enter data into Human Resources Custom Forms from the Employee Profile area.

(Custom Forms view from Employee Profile: WH\EP\TB\CU)

OVERVIEW FOR CREATING A CUSTOM FORM

1. Create a Custom Form by configuring the Form Maintenance screen

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    a. **FORM NAME:** Name of the Custom Form. Used to identify the form on the Custom Forms browse.

    b. **SINGLE FORM PER EMPLOYEE:** Allows you to enter information in the Custom Form only once for each employee (one record associated with the Custom Form per employee). You *cannot* change this option after you create the form.

    c. **MULTIPLE FORMS PER EMPLOYEE:** Allows you to enter information in the Custom Form multiple times for each employee (multiple records associated with the Custom Form per employee). You *cannot* change this option after you create the form.

    d. **FORM SORT:** Allows you to choose the order (Newest to Oldest or Oldest to Newest) in which the multiple form entries or records are presented. This option only appears when Multiple forms per employee is selected.

2. Add fields to a Custom Form and Selecting Data Types for Fields

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    - **CHARACTER:** A Character field allows alphanumeric input. When creating a Character field, you also set the maximum length of the

field. You can also identify valid entries for the field, so when data entry is performed, only declared valid entries are accepted.

- **DATE:** A Date field only accepts a date in the MM/DD/YYYY format.

- **DECIMAL:** A Decimal field accepts numbers that contain a decimal. When creating the Decimal field, you specify the number of decimal places that the field accepts. The default format for decimal entry is ->>,>>9.99. You can change the default format by modifying the values in the Format field.

  The negative sign must be present if you want to allow negative values to be entered. Otherwise, you can remove the negative sign from the default format. Up to 15 places are allowed in the default format, including the negative sign, commas and the decimal.

- **INTEGER:** An Integer field only accepts numbers. The default format for integer entry is ->>,>>9. You can change the default format by modifying the values in the Format field.

  The negative sign must be present if you want to allow negative values to be entered. Otherwise, you can remove the negative sign from the default format. Up to 15 places are allowed in the default format, including the negative sign and commas.

- **LOOKUP:** A Lookup field allows users to select from values that exist in a lookup table. When you add a Lookup field, you can either select from existing lookup tables that have been created for use in other forms, or you can create a new lookup table. Lookup tables only need to be created once and can then be used across multiple Custom Forms.

- **READ ONLY TEXT:** A Read Only Text field displays only text. It does not accept any entry into the field. This can be useful when you want to provide additional information to the user when they are completing data entry. For example, you could create a Read Only Text field to use as a "title" when grouping related fields together on a Custom Screen. You do not need to use Read Only Text fields on Advanced Custom Forms since Advanced Custom Forms allow free-form data entry.

3. Create the User Interface for a Custom Form

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4. Setting Security Group for Custom Screen

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