

# Summer Academy 2017

## Custom Forms

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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.

The screenshot shows the 'Custom Forms' interface. On the left is a sidebar with a tree view containing categories like 'Contracts', 'Flex', 'WA - General', 'WA - Experience', 'WA - Retirement', 'Retirement', 'Check History', 'Calendar YTD', 'Fiscal YTD', 'W2', '1099R', 'Leave History', 'Time Off', 'Sub Tracking', 'Ins Tracking', 'ACA Information', 'Certification', 'Degrees', 'Credits', 'Position', 'True Time', 'Fast Track', 'Employee Letters', 'Online Forms', 'Custom Forms', 'UDF Tables', 'Emergency Contacts', 'Change History', 'Confidentiality Flag', and 'Org Chart'. The 'Custom Forms' item is selected. The main content area shows a form for an employee profile. At the top, there's a header 'Custom Forms' with a star icon and a search bar. Below that are buttons for 'Employee:', 'Ranges', 'Add', 'Delete', 'Notes', 'Attach', and '\* History'. The form fields include: 'Employee Type', 'User Name', 'Name ID', 'Building', 'Check Location', 'Gender', 'Age', 'Hire Date', and 'Birth Date'. The 'IMMUNIZATIONS' section has an 'Edit' button and a large text area for notes. The immunization fields are: 'Tdap/Dtp STATUS', 'Tdap/Dtp', 'Td STATUS', 'Td', 'MMR STATUS', 'MMR #1', 'MMR #2', 'MEASLES STATUS', 'MEA #1', 'MEA #2', 'MUMPS STATUS', 'MUM #1', 'MUM #2', 'RUBELLA STATUS', 'RUB #1', 'RUB #2', 'HEP A STATUS', 'HEP A #1', 'HEP A #2', 'HEP B STATUS', 'HEP B #1', 'HEP B #2', 'HEP B #3', 'Varicella STATUS', 'Varicella #1', and 'Varicella #2'. On the right side of the immunization section, there are fields for 'Employee's Birth Date', 'Employee's Building Desc', 'Employee's Email', and 'Employee's Primary Phone'. A large 'Notes' field is also present.

(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

WHEP\PS\CF\CF\MS

Form Maintenance

Form

System: Custom Profile

\* Form Name: IMMUNIZATIONS

Form Type:  Single form per employee  Multiple forms per employee

Save

Back

Asterisk (\*) denotes a required field

- 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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Custom Field

Form: Custom Profile.IMMUNIZATIONS

\* Label: View Field Information

Data Type: Date

Format: 99/99/9999

Tool Tip:

Initial Value: Blank

Read Only  Required

Save and Add Another Field

Save and Clone to Another Field

Save and Go to Next Step

Save

Back

Asterisk (\*) denotes a required field

- **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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The screenshot shows the configuration for a custom form named 'IMMUNIZATIONS'. The form is associated with the profile 'custom.profile.immunizations'. The screen size is set to 'Default' (880 x 600 pixels). The 'Secure Screen' checkbox is checked. The interface is divided into two main sections: 'Skyward Fields' and 'Custom Fields'. The 'Skyward Fields' table lists various employee-related fields with 'RO' and 'RQ' checkboxes and 'Add' or 'Remove' buttons. The 'Custom Fields' table lists immunization status fields (HEP A #1, HEP A #2, HEP A STATUS, HEP B #1, HEP B #2, HEP B #3, HEP B STATUS) with 'Remove' buttons. Below these tables is a visual representation of the form layout, showing fields for 'Tdap/Dtp STATUS', 'Employee's Birth Date', 'Employee's Building Desc', 'Employee's Email', and 'Employee's Primary Phone'. A 'Notes' section provides instructions on handling text overflow. A 'Place Fields Here' area with a drag instruction is also visible.

### 4. Setting Security Group for Custom Screen

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This screenshot shows the 'Edit Custom Screen' configuration for the 'IMMUNIZATIONS' form. The 'Secure Screen' checkbox is highlighted with a red box, and the 'Set Security Groups' button is also visible. Other settings include the form name 'IMMUNIZATIONS', screen size 'Default', and dimensions '880 x 600'.

**Web Human Resources Security Group Selection**

Views: Security Groups | Filters: \*Skyward Default

Select	Entity	Group Id	Description
<input type="checkbox"/>	000	FAST TRK	FAST TRACK
<input type="checkbox"/>	000	HR-B Analyst	HR-ESD Budget Analyst
<input type="checkbox"/>	000	HR-PR CLERK	HR-PAYROLL CLERK
<input checked="" type="checkbox"/>	000	SAO	SAO
<input type="checkbox"/>	000	WHR-PAY OFF	WHR-PAYROLL OFFICER
<input type="checkbox"/>	000	WP	WEB PRINTING

Buttons: Save, Back, Unselect All, View Security Levels