

Workflow and Setup

Last Modified on 06/05/2023 12:39 pm CDT

This section of the study guide explains the setup that needs to be done before using Activity Registration.

Activity Registration Overview

Classic View: Activity Registration > Activity Monitor

Search Terms: Activity Monitor

On this page

Introduction to Activity Registration

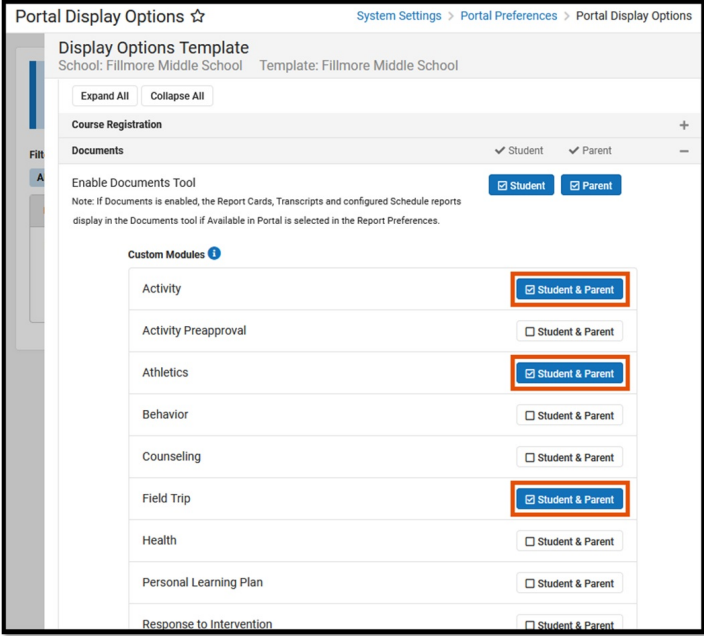
The Activity Registration module provides districts with a tool for managing activities that require a registration process including a registration packet, payment, and a roster. Activity Registration is completed in the Campus [School Store](#) based on registration dates you control. Once a student has registered for an activity, that activity no longer appears for them in the School Store.

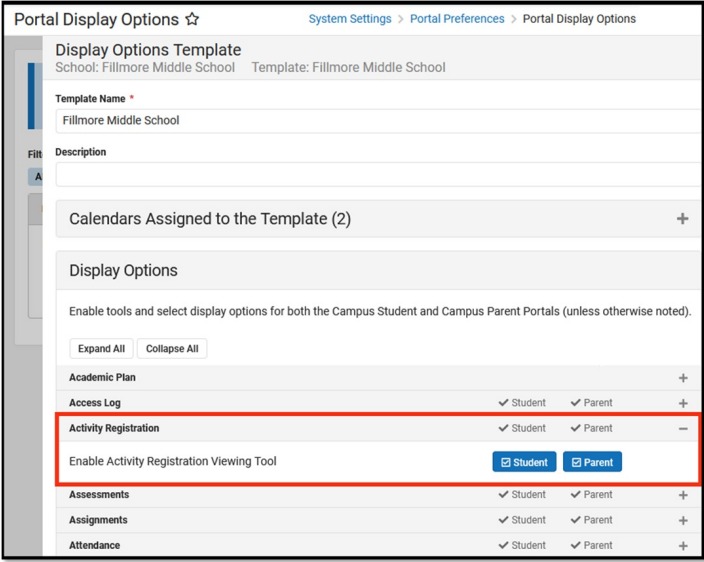
Before You Begin

Be sure you have finished setting up the [School Store](#) and [Payments](#) modules.

Activity Registration Setup Workflow

Step	Campus Location
Set Up Custom Forms and Ad Hoc Filters	
<p>1 Upload and manage supplemental Activity Registration documents in the Custom Forms tool. Activities require at least one form but more can be added.</p> <p>The following Activity Registration options are available in the Module field in Custom Forms: Activity, Activity Preapproval, Athletics and Field Trip. Forms created with these options can only be assigned to a student via the Campus School Store and Activity Registration.</p> <div data-bbox="272 1653 987 1787" style="border: 1px solid #add8e6; padding: 5px; margin: 10px 0;"> <p>The Activity Preapproval process can only use custom form types of <i>Interactive Form with Database Table</i> and <i>Interactive Form</i>.</p> </div> <p>If you use an interactive form, you can also use the following Ad hoc fields to prepopulate the form: <i>activityName</i> and <i>studentFirstLastName</i>. For prepopulating to work, you must use the Ad hoc fields as the field names in your PDF. These fields are case sensitive.</p>	<p>Classic View: System Administration > Custom Forms</p> <p>Search Terms: Custom Forms</p>

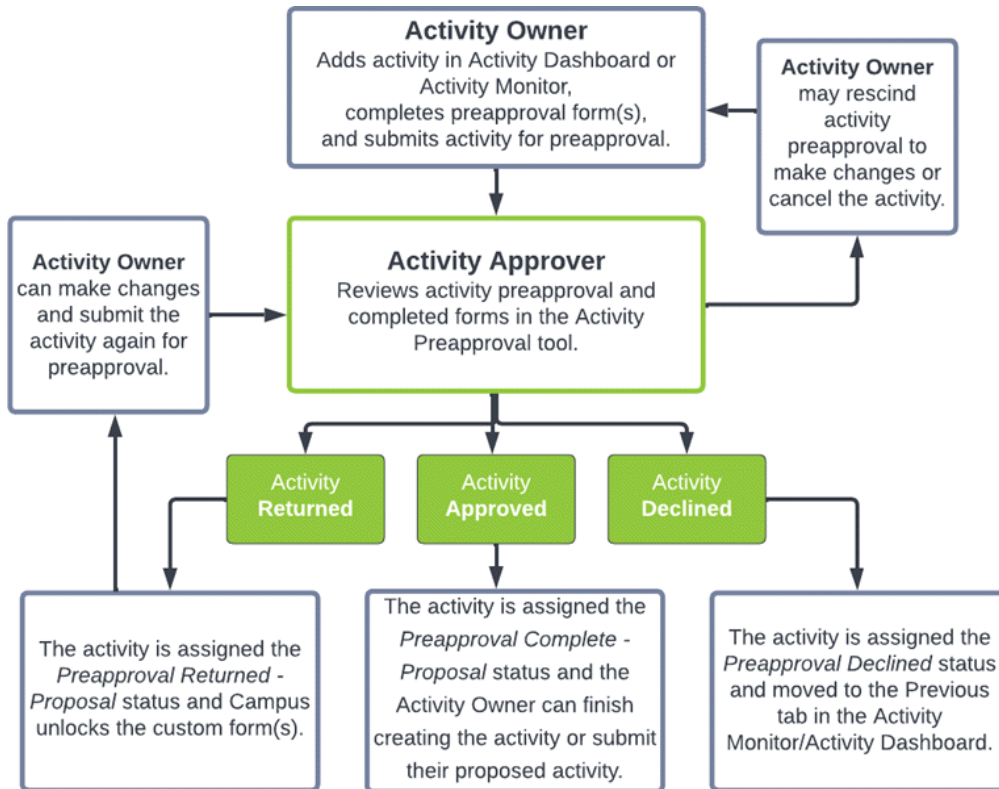
Step	Campus Location
<p>2 Create an Ad Hoc filter for selecting eligible students. Each activity requires an Ad Hoc filter. Campus only allows students who are included in the Ad Hoc filter to register for the activity.</p>	<p>Classic View: Ad Hoc Reporting > Filter Designer Search Terms: Filter</p>
<p>Set Up Portal Preferences</p>	
<p>3 Make sure the Activity, Athletics, and Field Trip Custom Modules are selected on the Portal Display Options tool.</p>  <p>The screenshot shows the 'Portal Display Options' interface for 'Fillmore Middle School'. Under the 'Custom Modules' section, the following modules are listed with their respective 'Student & Parent' checkboxes checked:</p> <ul style="list-style-type: none"> Activity Athletics Field Trip 	<p>Classic View: System Administration > Portal > Preferences > Display Options Search Terms: Display Options</p>

Step	Campus Location
<p>4 Make sure the Enable Activity Registration Viewing Tool option has the Student and/or Parent checkboxes marked if you want to allow users to see Activity Registration information in Campus Student or Campus Parent. When these options are enabled, users can see the activities for which the student has registered. To be considered "registered" the activity fee must be paid. Any applicable forms and options purchased for the student also display.</p> 	<p>Classic View: System Administration > Portal > Preferences > Display Options Search Terms: Display Options</p>
Add District Assignments	
<p>5 The following checkboxes display on the District Assignments tool and determine which staff may be assigned to activities.</p> <ul style="list-style-type: none"> • Activity Staff: When this checkbox is marked, the staff member may be assigned as the primary or secondary owner responsible for an activity. • Activity Preapproval: When this checkbox is marked, the staff member may be assigned as the School Approver, District Approver, or International Approver for an activity preapproval request. 	<p>Classic View: Census > People > District Assignments Search Terms: District Assignments</p>
Set Up Preapproval Configurations (Optional)	
<p>6 Use the Preapproval Configuration tool to set up the rules, identify the appropriate approvers, and assign the forms that must be completed before an activity can be made available for registration in the School Store.</p>	<p>Classic View: Activity Registration > Preapproval Configuration Search Terms: Preapproval Configuration</p>
Set Up Activities	
<p>7 Add new activities in the Activity Builder tool.</p>	<p>Classic View: Activity Registration > Activity Monitor > Activity Builder Search Terms: Activity Monitor</p>
Manage Activities	
<p>8 View the Activity Roster and mark forms as complete.</p>	<p>Classic View: Activity Registration > Activity Monitor > Activity Roster Search Terms: Activity Monitor</p>

Step		Campus Location
9	Review past activities and monitor upcoming activities in the Activity Monitor .	Classic View: Activity Registration > Activity Monitor Search Terms: Activity Monitor
10	Use the Activity Monitor to review proposed activities. You can approve, decline, or return activities submitted through the Activity Dashboard .	Classic View: Activity Registration > Activity Monitor Search Terms: Activity Monitor

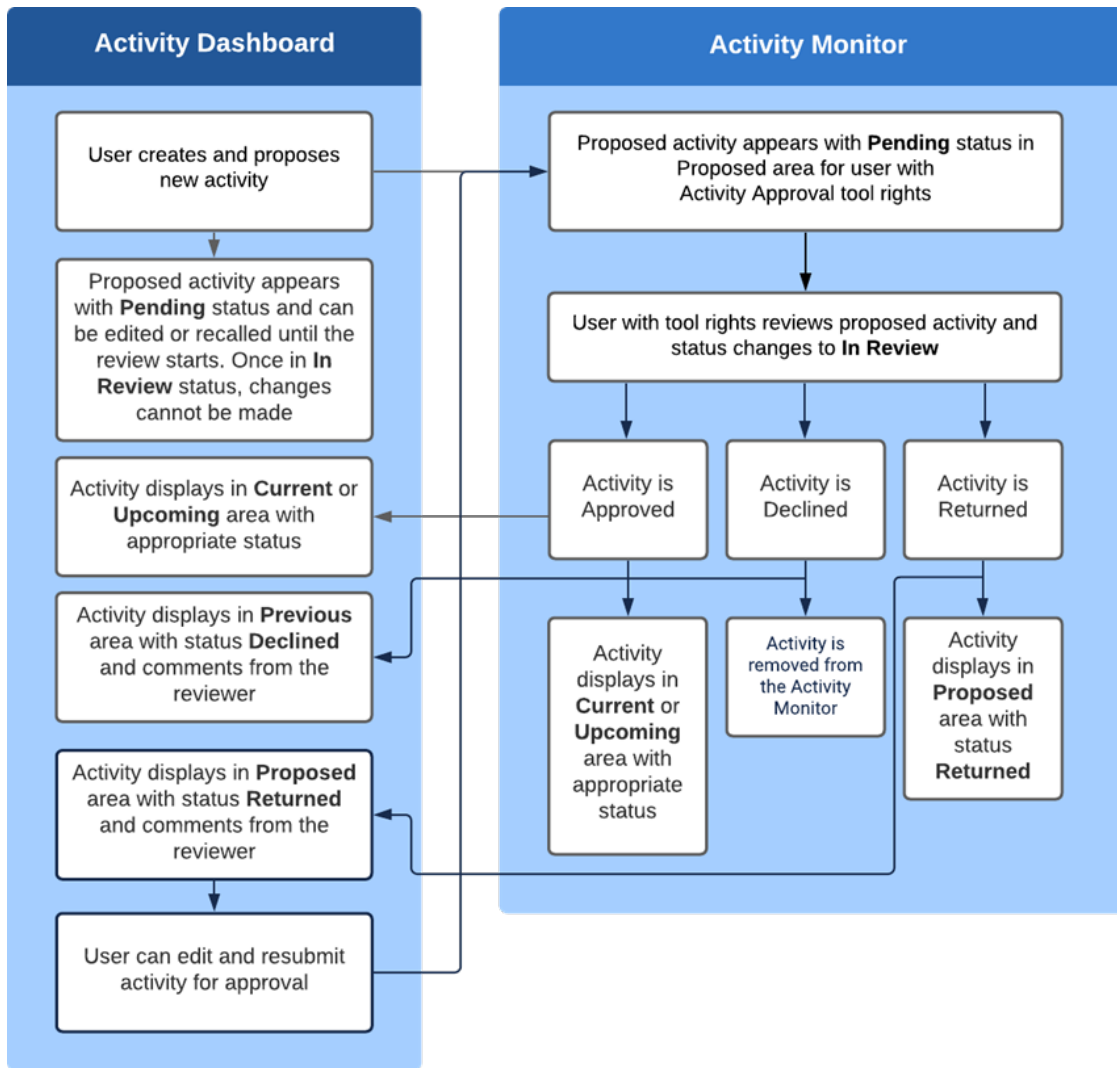
Preapproval Process

The preapproval process is the process in Activity Registration that requires activity owners to request approval before an activity can finish being created and/or is made available for registration in the School Store. The specific rules that trigger the preapproval process and the forms that the activity owner must complete and route to internal approvers are defined in the [Preapproval Configuration](#) tool. The Preapproval Process was introduced in Campus.2223.



Activity Proposal Workflow

The following chart provides the basic process a proposed activity goes through in Campus. The ability to propose activities was introduced in Campus.2116.



Tool Rights for Activity Registration

Tool Rights determine the level of access users have to tools throughout Campus. This article refers to tool rights in abbreviated form (i.e., R, W, A, D or any combination of the four). Sub-rights appear as *italicized*.

Right	Description
R (Read)	The R right indicates the information on the corresponding tool may be viewed by the user. When applicable, the user is also allowed to print information. The user will NOT have access to the Save, Add or Delete icons in the action bar.
W (Write)	The W right indicates the user may view and modify the information on the corresponding tool. The Save icon in the action bar will be functional. This right allows the user to modify only existing data in the area since adding new data is controlled by the A right. This right includes the ability to change or remove data from a specific field.
A (Add)	The A right indicates the user may view, modify and add to the information on the corresponding tool. The New and Add icons in the action bar will be functional. This right allows the user to add new data/records.

Right	Description
D (Delete)	ASSIGN THIS RIGHT WITH CAUTION. The D right indicates the information on the corresponding tool may be deleted. The Delete icon in the action bar will be functional. This right provides the ability to completely remove an existing record, including all data contained within the record. The ability to change/remove data from a field is controlled through the W right.

RWAD Rights assigned at the module or folder level give those rights to all features within the module. For example, giving RW rights to the System Administration Health folder assigns RW rights to all tools within that folder, including any subrights.

Tool Right Paths

- *Student Information > Activity Registration*
- *School Store > Product Inventory*

Right	R	W	A	D
Activity Registration	View Only	View and Modify	View, Modify, and Add	N/A
Activity Monitor	View Only	View and Modify	View, Modify, Add, and Copy	Users can remove activities that are in the Ready (Upcoming) or Draft (Current) status.
Activity Approval	Allows users to approve, return, and decline proposed activities.	N/A	N/A	N/A
Activity Dashboard	Users can view any activities they submit or view activities for which they are listed as the activity owner.	Users may edit proposed activities that they have submitted.	Users may submit proposals for new activities and copy existing activities.	Users can remove activities that are in the Ready (Upcoming) or Draft - Proposal (Proposed) status or recall proposed activities after they are sent for approval.
	Secondary Activity Owners only have a read-only view of the activity to which they are assigned unless they are also the creator of the proposed activity. Secondary owners on an activity do not have the Remove button for delete/cancel functions even if the Delete tool right is assigned.			
Activity Roll Forward	N/A	N/A	Users can roll activities forward en masse.	N/A
Preapproval Configuration	View Only	View and Modify	View, Modify, and Add	Delete

Right	R	W	A	D
Preapproval Requests	View Only	Allows users manage preapproval requests.	N/A	N/A

Previous Versions

[Activity Registration Overview \[.2124 -.2219\]](#)

Enable and Create School Store

School Store needs to be enabled in Digital Repository Preferences so pictures can be added within the Activity Registration module. See Step 1 of the article below to enable School Store.

+ [Documentation](#)

If schools are going to use the Activity Registration module, each school needs to establish a School Store.

+ [Documentation](#)

+ [Video](#)

Set Up Product Types

Product Types are assigned to Products and aligned to Fund Accounts in the Payments module. When a product is purchased, funds are deposited into the bank associated with the Fund Account to which you assigned the Product Type

+ [Documentation](#)

+ [Video](#)

Set Up Fund Accounts

Fund Accounts identify which bank accounts are used for items purchased in the School Store and Activity Registration. Product Types and Fee Types are tied to fund accounts.

+ [Documentation](#)

+ [Video](#)

Create Custom Forms

Classic View: System Administration > Custom Forms

Search Terms: Custom Forms

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 dropdown 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.

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	

Image 1: Custom Forms List Screen

Column Header	Description
Module	The module in which the form is available.

Column Header	Description
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	An indicator if the form is Portal, Portal Fillable, Portal eSignature, Interactive with Database Table , Interactive , and Blank . See each section below for detailed instructions on how to create each form type.
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.

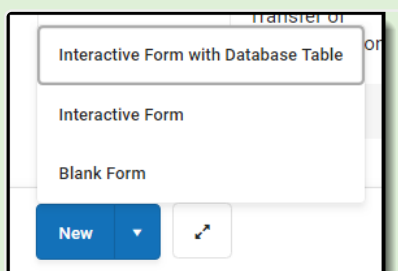


Image 2: New Button Options

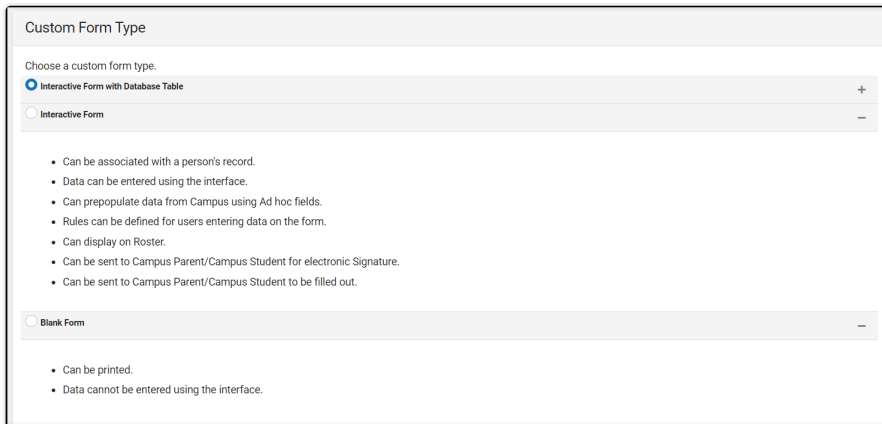


Image 3: Custom Form Type Selection Screen

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.

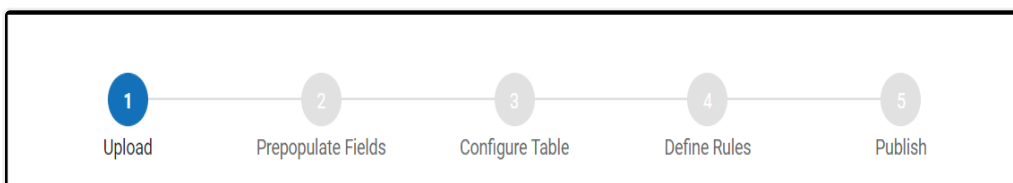


Image 4: Interactive with Database Table Workflow

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](#)

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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.

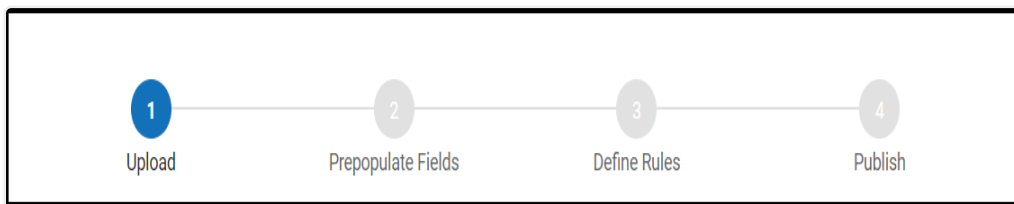


Image 5: Interactive Workflow

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](#)

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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

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Plainview Schools

Save
Cancel
🔄

Image 6: Blank Upload Screen

Field Name	Description
------------	-------------

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> <p>Only PDFs created using Adobe Acrobat Professional or Adobe DC are supported for Custom Form creation.</p>
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.

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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.

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

Image 8: 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>
Name	<p>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.</p>

Field	Description
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; margin-top: 10px;"> <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; margin-top: 10px;"> <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: #ffe0e0; padding: 10px; margin-top: 10px;"> <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.

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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.

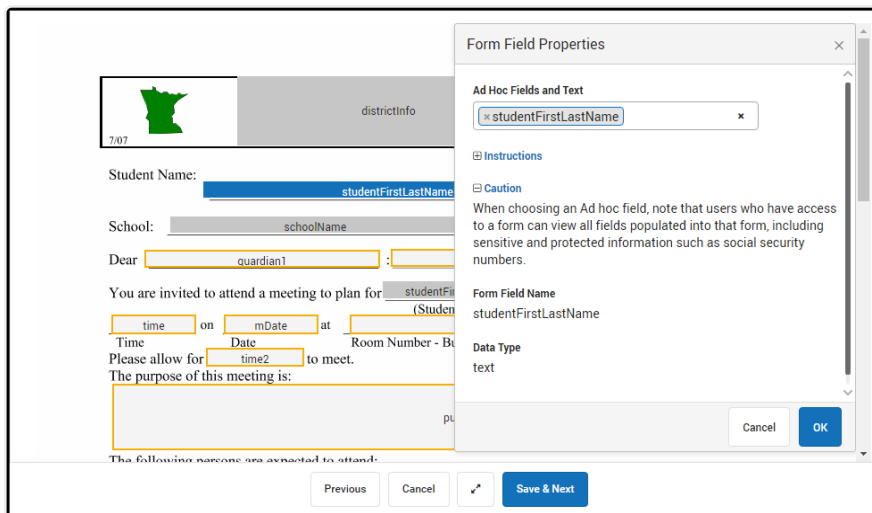


Image 9: Prepopulate Fields

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.

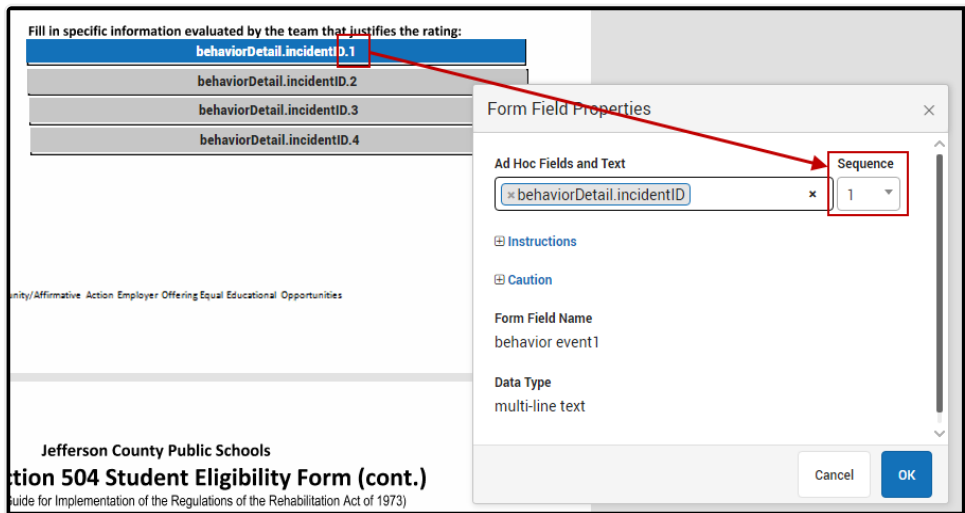


Image 10: Field Sequence

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.

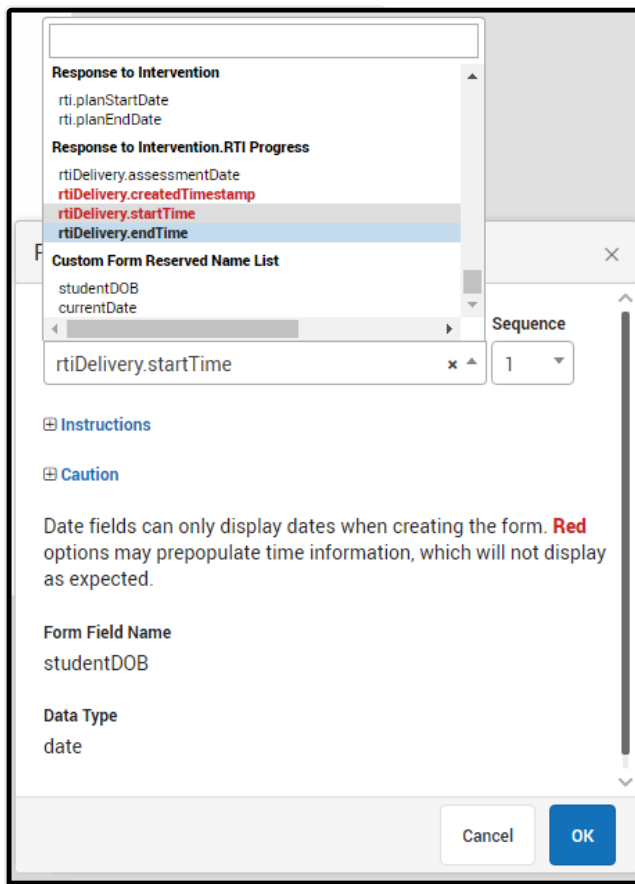


Image 11: Map Date Fields

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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.

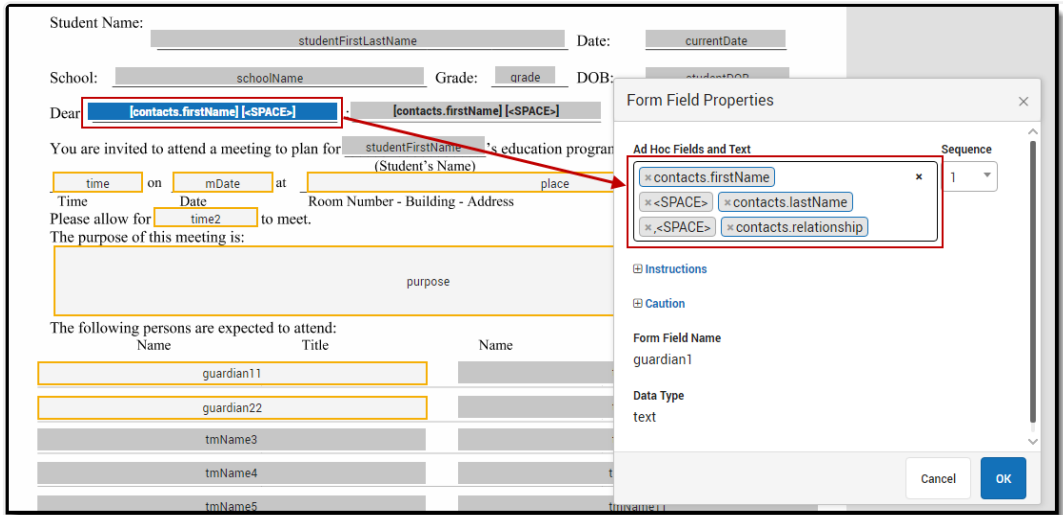
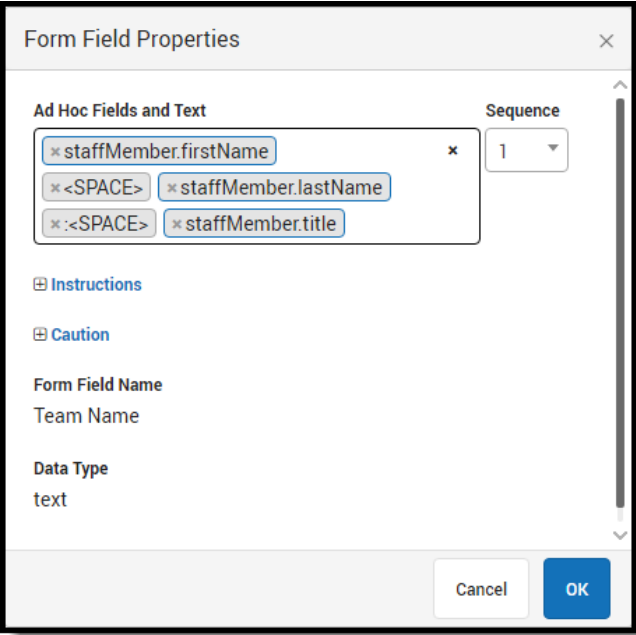


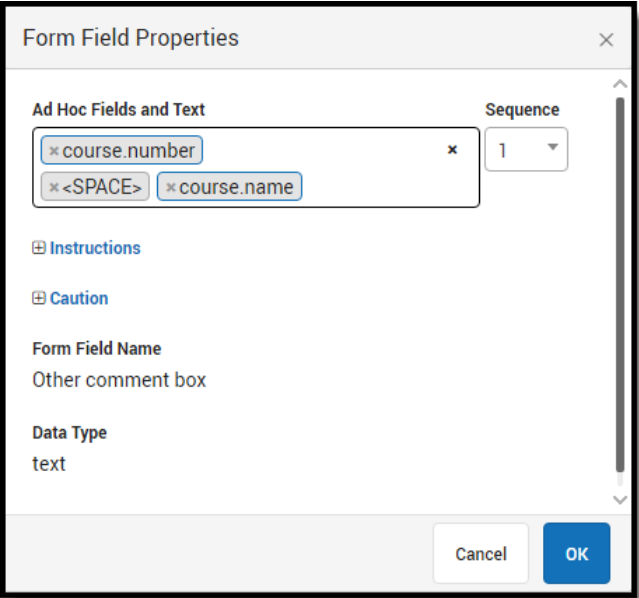
Image 12: Link Ad Hoc Fields

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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>	 <p>The screenshot shows a 'Form Field Properties' dialog box. Under the 'Ad Hoc Fields and Text' section, there are three entries: 'staffMember.firstName', '<SPACE> staffMember.lastName', and '<SPACE> staffMember.title'. A 'Sequence' dropdown menu is set to '1'. Below this are expandable sections for 'Instructions', 'Caution', 'Form Field Name' (with the value 'Team Name'), and 'Data Type' (with the value 'text'). At the bottom right, there are 'Cancel' and 'OK' buttons.</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.


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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 use to fill out for people. 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).

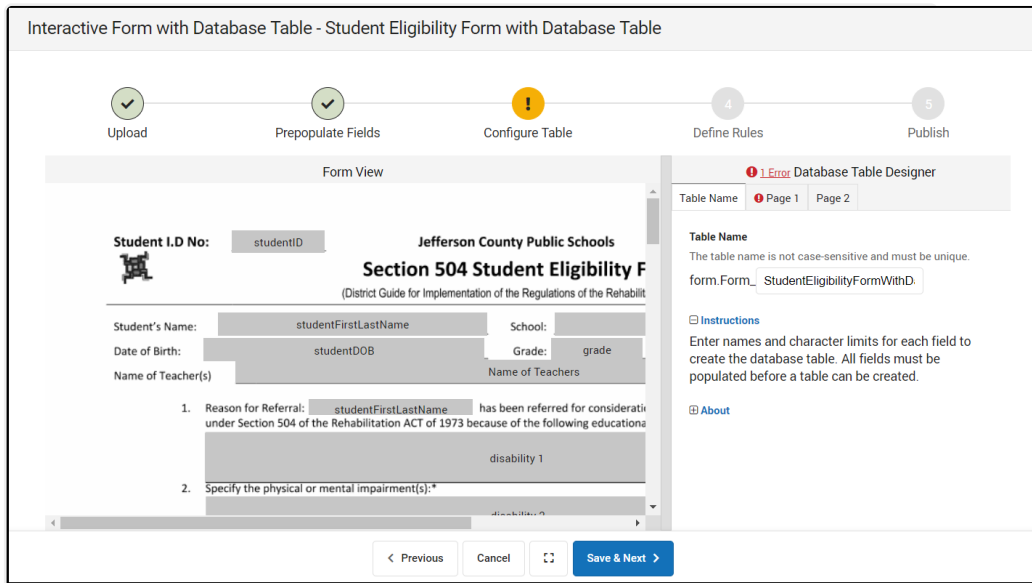


Image 13: Database Table Designer

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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.

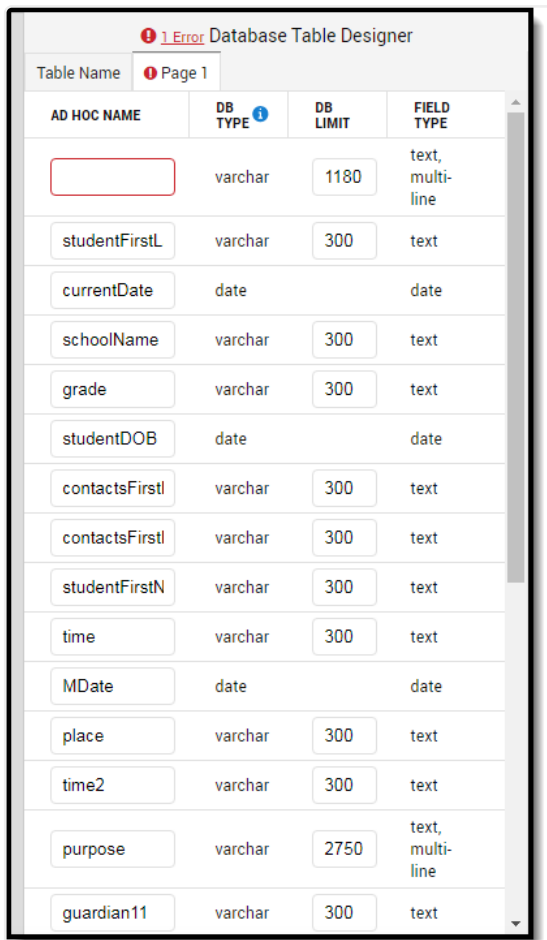


Image 14: Database Pagination

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> <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>
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.</p> <p>Only PDFs created using Adobe Acrobat Professional or Adobe DC are supported for Custom Form creation.</p>

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.

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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.

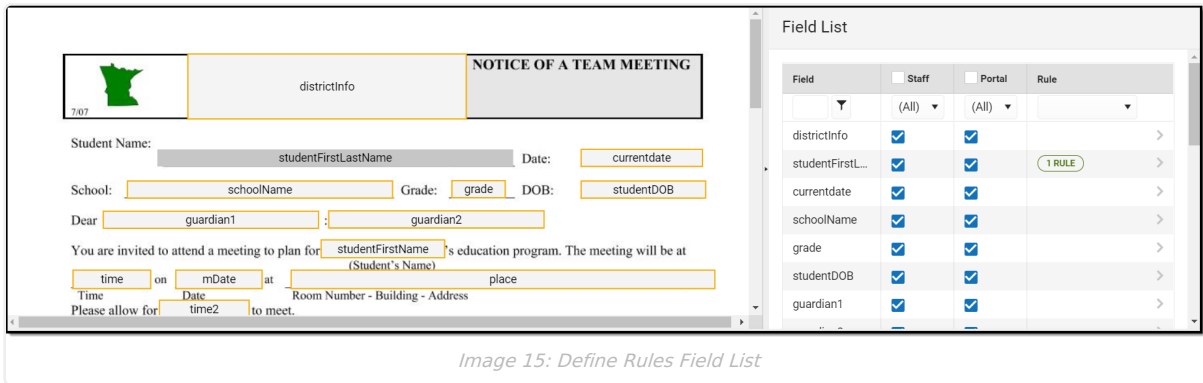


Image 15: Define Rules Field List

▶ [Click here to expand...](#)

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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.

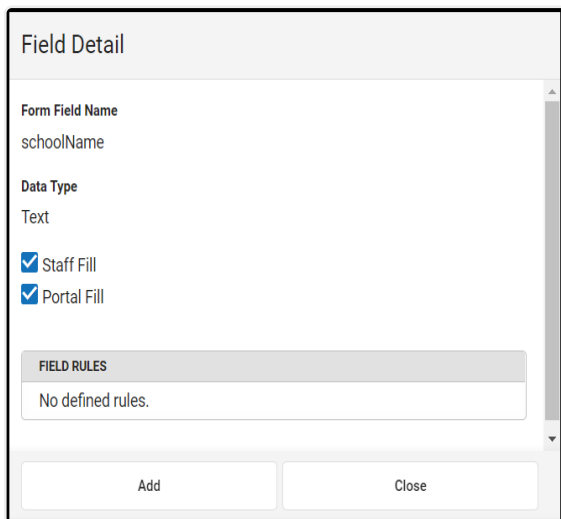


Image 21: Field Details

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.

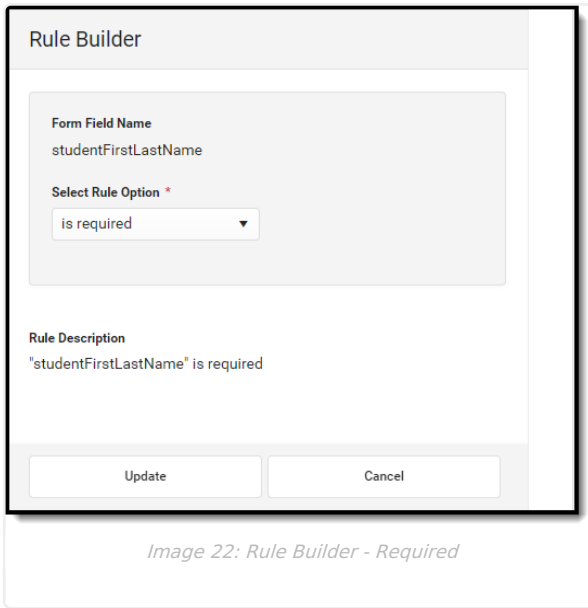


Image 22: Rule Builder - Required

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).

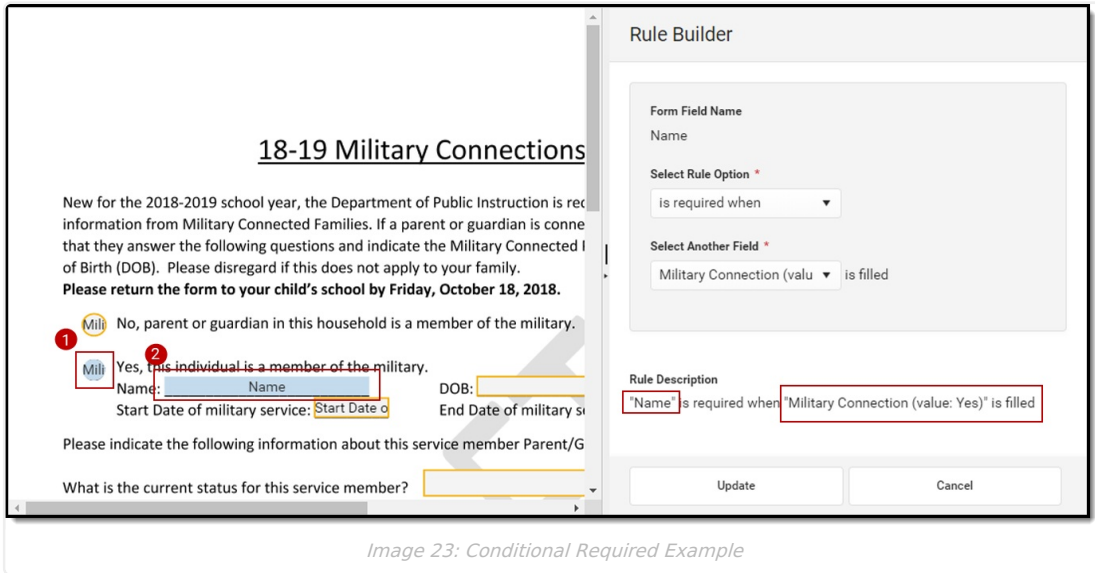
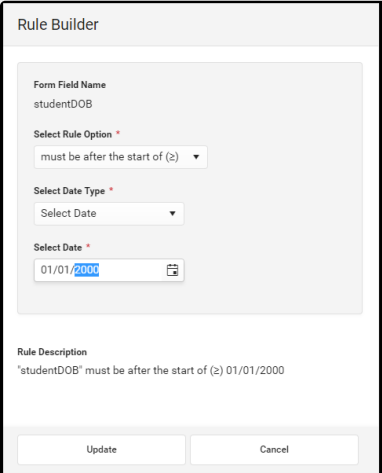
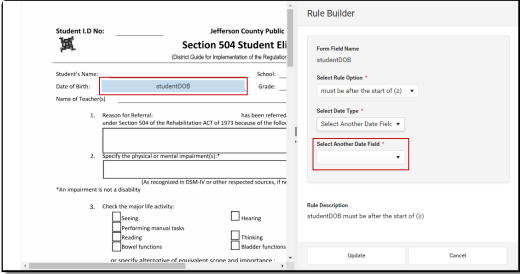


Image 23: Conditional Required Example

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 (<)

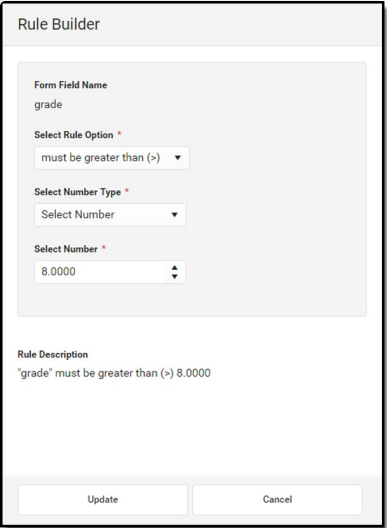
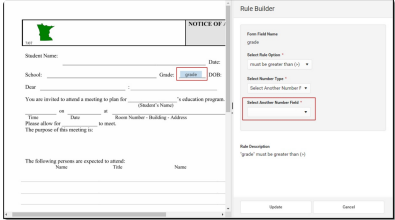
The **Select Date Type** field has two options. A date field can either be compared to a specific date entered or to another date field on the PDF.

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>Image 24: 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>Image 25: 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><i>Image 26: 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><i>Image 27: 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.

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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.

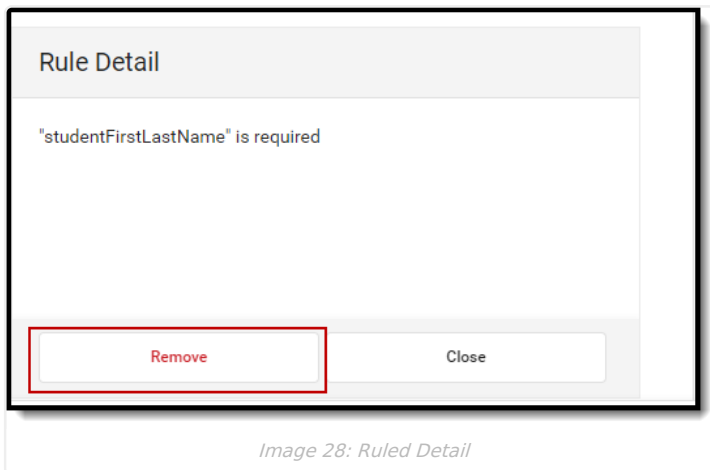


Image 28: Ruled Detail

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

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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.

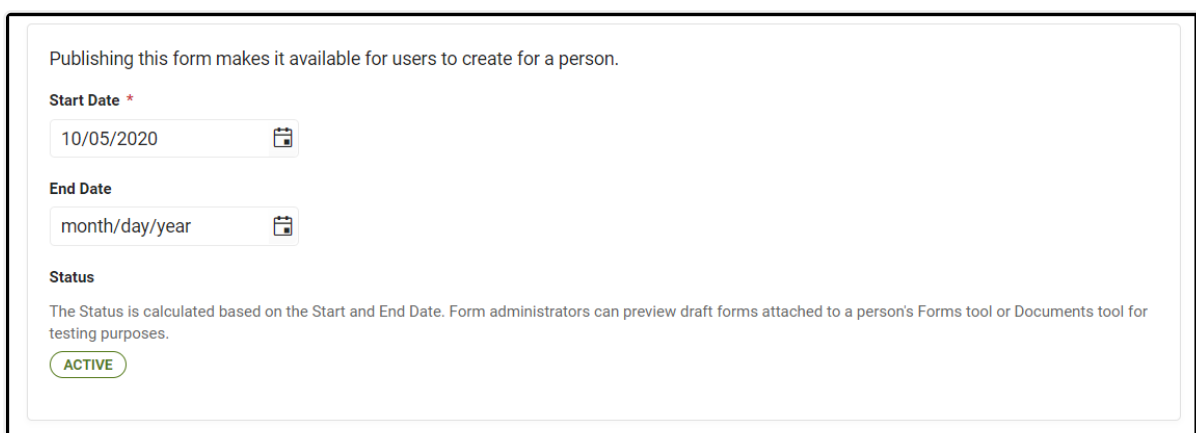


Image 29: Publish

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>

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Custom Forms in Ad hoc

Classic Path: 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.

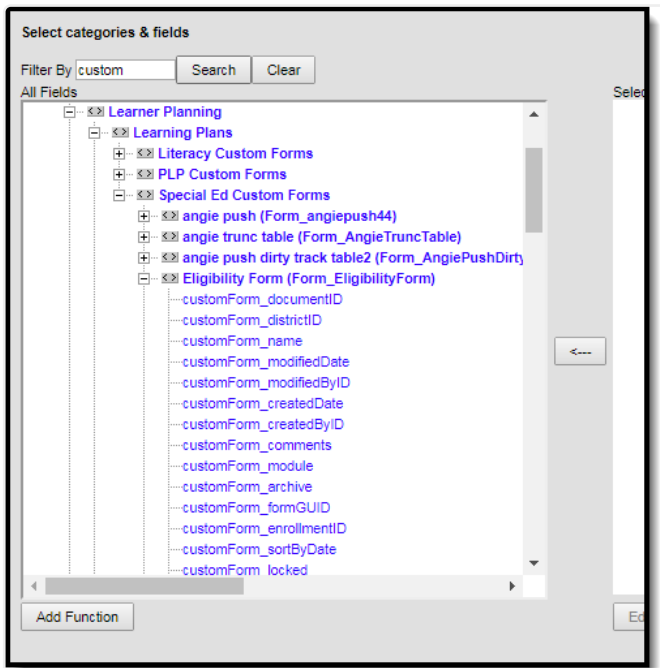


Image 30: Custom Forms in Ad hoc

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.

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Preview Draft Forms

Classic Path: [Student Information](#) > [Module](#) > [General](#) > [Documents](#)

Classic Path: [Student Information](#) > [General](#) > [Forms](#)

Search Terms: (Module) Documents, Forms

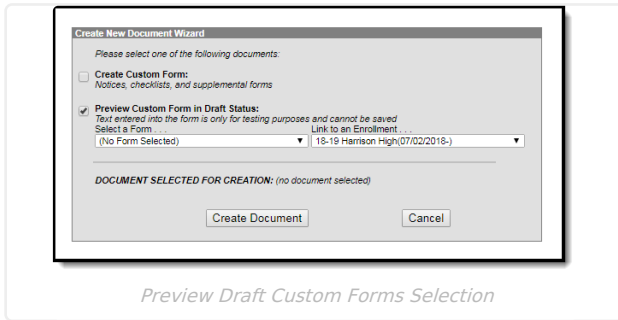
Users have the ability to preview Interactive and Interactive with Database Table custom forms in draft status on a person's Forms tool or Documents tab. This preview allows form administrators to troubleshoot and test custom forms before the form is published. See the [Tool Rights \(Custom Forms\)](#) 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

1. Navigate to Student Information > Module > General > Documents > Create New Document/Plan. The **Create New Document Wizard** displays.



Preview Draft Custom Forms Selection

2. Select the **Preview Custom Form in Draft Status** checkbox.
3. Choose the form from the **Select a Form...** dropdown.
4. Click the **Create Document** button.
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.
6. Click the **Preview Form** button. The draft custom form displays.
7. **Hover over** or **click** a fillable field on the custom form. A field properties window displays.

Forms Tool

1. Navigate to Student Information > General : Forms. The **Forms List Screen** displays.
2. Click the **New button** dropdown and select the **Preview Unpublished Forms** option.

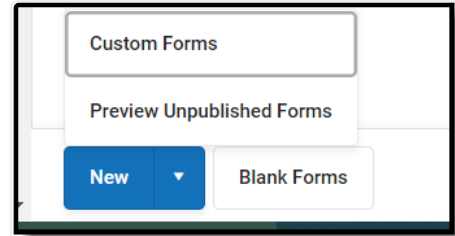


Image 32: Preview Unpublished Forms

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. See the [Documents](#) tool documentation for additional information on selecting prepopulated data for custom forms.
5. Click the **Preview Form** button. The draft custom form displays.
6. **Hover over** or **click** a fillable field on the custom form. A field properties window displays.

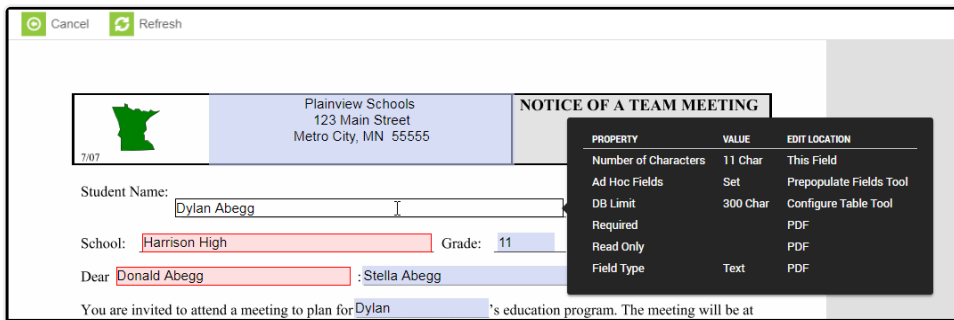


Image 33: Field Properties Window

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.

Field Property	Description
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. <div style="border: 1px solid #ccc; background-color: #fff9c4; padding: 5px; margin-top: 10px;"> <p>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.</p> </div>
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.

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Reserved Name List

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

Student Information Fields	Notes
stateID	
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

Student Information Fields	Notes
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	
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	

Student Information Fields	Notes
caseManagerTitle	
caseManagerPhone	

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Set Up Preapproval Configurations

Certain activities may need preapproval based on rules determined by a school or the district. These activities require forms to be completed and submitted. The Preapproval Configuration tool is used to create rules and associate forms for activities requiring a preapproval process.

+ [Documentation](#)

+ [Video](#)