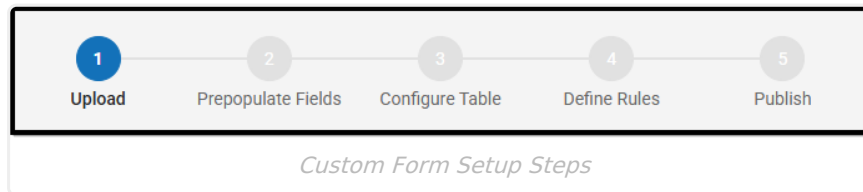


Create an Interactive Custom Form with a Database Table

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Tool Search: Custom Form Setup

This guide explains how to upload a PDF as a custom form with a database table. This is a multi-step process with many features and options.



Before you start

- Create the PDF form using Adobe Acrobat Pro or Adobe DC. See the [Custom Form Creation](#) article for additional information.
- Ensure you have the appropriate [tool rights](#) for the module(s) you want to create custom forms for.

Step 1: Upload the PDF file

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

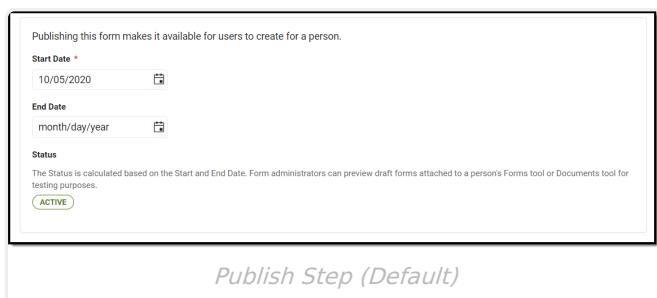
Step 2: Prepopulate field selection

Step 3: Configure database table fields

Step 4: Define rules

Step 5: Publish

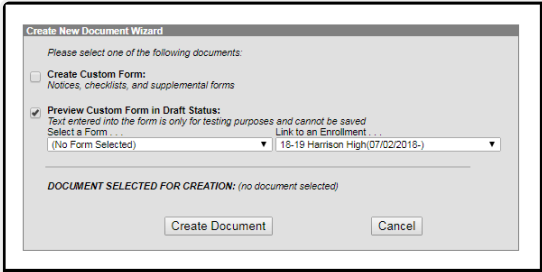
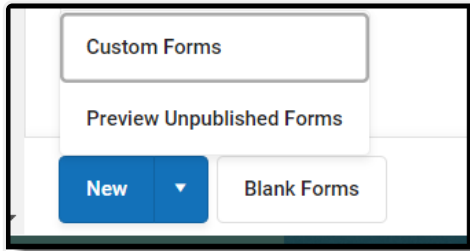
1. Enter a **Start Date**.
2. (Optional) Enter an **End Date**.
3. Click the **Publish** button.



The screenshot shows the 'Publish Step (Default)' form. It includes a header stating 'Publishing this form makes it available for users to create for a person.' Below this, there are two date selection fields: 'Start Date' with a value of '10/05/2020' and 'End Date' with a value of 'month/day/year'. A 'Status' section indicates 'The Status is calculated based on the Start and End Date. Form administrators can preview draft forms attached to a person's Forms tool or Documents tool for testing purposes.' The status is currently set to 'ACTIVE'.

Preview Draft Forms

Users can preview Interactive and Interactive with Database Table custom forms in draft status on a person's Forms tool or the module's Documents tool. This preview allows form administrators to troubleshoot and test custom forms before they are published. See the [Tool Rights \(Custom Forms\)](#) document for additional information.

Documents Tool	Forms Tool
<ol style="list-style-type: none"> 1. Navigate to Student Information > Module > General > Documents > Create New Document/Plan. The Create New Document Wizard displays.  <p><i>Preview Draft Custom Forms Selection</i></p> <ol style="list-style-type: none"> 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. 	<ol style="list-style-type: none"> 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.  <p><i>Preview Unpublished Forms</i></p> <ol style="list-style-type: none"> 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.

Cancel

Refresh

7/07

Plainview Schools

123 Main Street

Metro City, MN 55555

NOTICE OF A TEAM MEETING

Student Name:

Dylan Abegg

School:

Harrison High

Grade:

11

Dear

Donald Abegg

:

Stella Abegg

You are invited to attend a meeting to plan for

Dylan

's education program. The meeting will be at

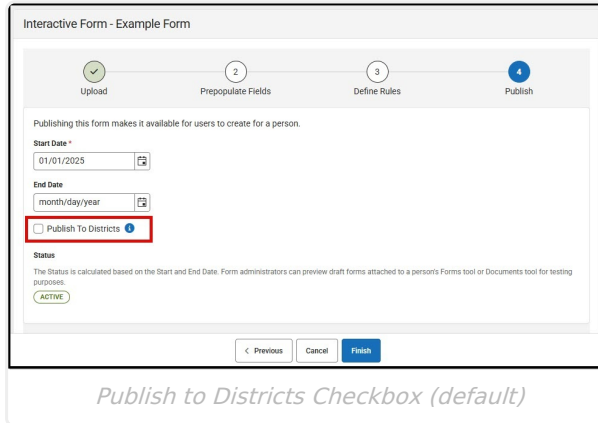
PROPERTY	VALUE	EDIT LOCATION
Number of Characters	11 Char	This Field
Ad Hoc Fields	Set	Prepopulate Fields Tool
DB Limit	300 Char	Configure Table Tool
Required		PDF
Read Only		PDF
Field Type	Text	PDF

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

State Edition Publish

State Edition users can publish Custom Forms to District Edition. Interactive and Interactive Forms with Database Tables published from the state sync back to the state when saved and locked. Blank Forms can also be pushed down from the State.



Publish to Districts Checkbox (default)

Follow the steps detailed in this article above to upload the custom form. For Interactive Forms, state edition users need to navigate to the **Publish** step, mark the **Publish to Districts** checkbox, and then click **Finish**. It may take a little while for the district to receive the form.

The process is slightly different for Interactive Forms with Database Tables. Before the custom form is published, the **Publish to Districts** checkbox does not display. The database table must exist first before the form itself can be published to the district. Upload the custom form following the steps detailed in this article above, including completing the Publish step. State Edition users must then go back into the form, navigate to the **Publish** step, mark the **Publish to Districts** checkbox, and then click **Finish**. It may take a little while for the district to receive the form.

These forms can only be deleted at the state level when they have not yet been assigned to a student at the district level. When a State no longer wants a form to be available for the districts, an **End Date** can be added to the form to make it Inactive.

What's next

- Attach the custom form to a student on the [Forms](#) tool or the module-specific [Documents](#) tool.
- Create a new version of the custom form to correct typos, rule changes, etc.
- Delete existing custom forms, as needed.