Version a custom form COPY

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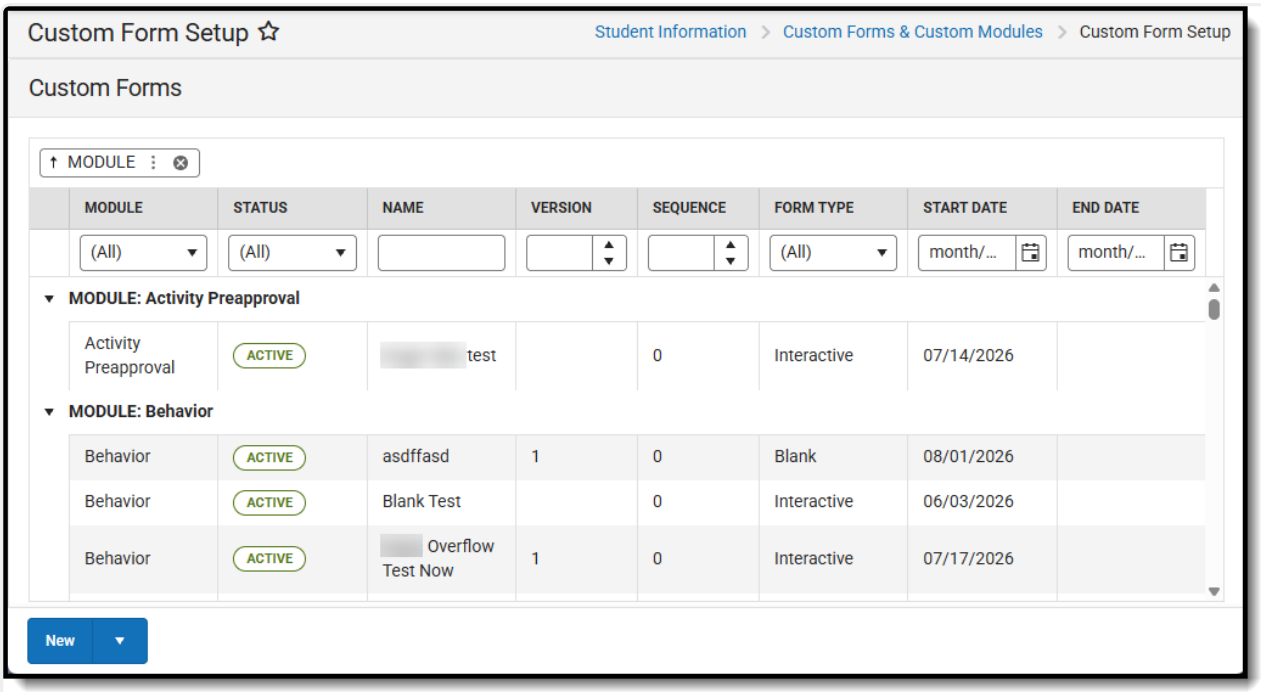
Path: Student Information > Custom Forms and Custom Modules > Custom Form Setup

Users can version existing custom forms to preserve certain configurations from a previous version. All custom form types can be versioned: Blank, Interactive, and Interactive with Database Table. This allows users to correct typos, update wording due to state or district changes, create a new form for the next school year, and track how the form has changed over time. A new version of the interactive forms with database tables allows users to use the same database table for reporting and keeping the data together.

This guide explains how to version a custom form.



The Custom Form Setup list screen.

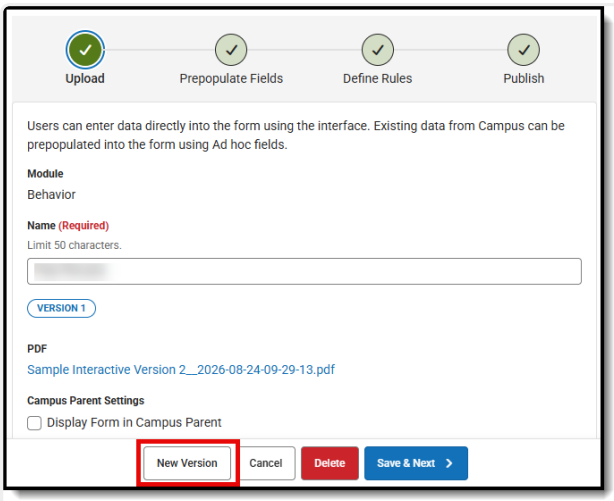
Before you start

- A custom form must exist before it can be versioned. Only the most recent, active custom form can be versioned. See the Custom Form Setup article for additional information.
- State-Edition published custom forms can also be versioned.
- Make sure you have a new PDF file saved to your computer before attempting to version a custom form. See the Custom Form Creation article for additional guidance.
- Set appropriate tool rights. See the Custom Form Setup Tool Rights for additional information.

The following modules' custom forms cannot be versioned: Activity, Activity Preapproval, Activity Registration, Athletics, Dependent Care, and Field Trip.

Version a custom form

These steps represent an overview of versioning a form. For details about the various sections, see the Custom Form Setup article.



The New Version button highlighted on the Upload screen.

1. Select an existing form. The **Upload** screen displays. For field descriptions, see the Upload section of the Custom Form Setup article.
2. Click the **New Version** button from the action bar.
3. All the form configurations from the previous version are copied to the new version, but can be modified. The version number automatically sequences to the next integer. This number displays below the name field.
4. Click the **Select file...** button to upload and select the new PDF version for this form. Most updates to a new version of a form are made in Adobe.
5. Enter a description into the **New Version Reason Description**. This field is limited to 500 characters and allows users to track a history of changes for this form.
6. Click **Save & Next**. The **Prepopulate Fields** screen displays. Navigate through the Prepopulate Fields, Configure Table, and Define Rules steps of the process.
    - All mappings, database configuration, and rules are copied from the previous form version.
    - Existing mappings and rules can be modified, **but the existing database configuration cannot be changed**. Only new fields can be modified on the Configure Table screen.
    - When a field that is part of a rule on the Define Rules step is removed, that rule is automatically removed.
7. Navigate to the Publish screen after completing the previous steps.
8. Enter a **Start Date** for the new version.
9. Click **Finish** when ready. The new version now displays in the list screen and is available to attach to students as of the entered Start Date.

Impact

- A new version of the form is now available and can be added for students as of the entered Start Date.
- If you are a state-edition user and the form was marked for publication to districts, the new version is now available to district users.

- The previous version no longer displays in the Custom Forms Setup list screen and is not available for assignment to students as of the new version's Start Date. See the Version Start and End Date logic section for additional information.

What's next

- Existing data from the previous version(s) can be queried in Ad hoc for interactive forms with database tables.
- Alert staff who need to add the new form version to their students' Forms tool or module-specific Documents tools.

View version history

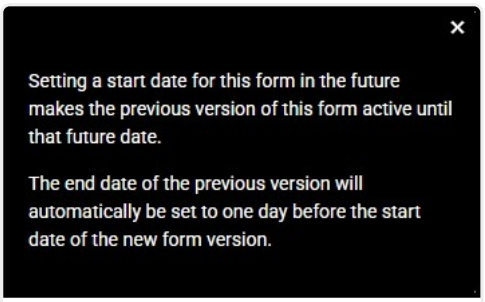
After a version is created, you can view the form's version history and any associated version comments.

1. Select an existing form from the list screen that has multiple versions. The Upload Screen displays.
2. Click the **Version History** button from the action bar.
3. The **Version History** side panel displays all versions for this form entry. Each section can be expanded or collapsed to view or hide the details. See the Version History side panel fields section for detailed field descriptions.
4. Click **Close** when finished.

Appendixes

Version Start and End Date logic

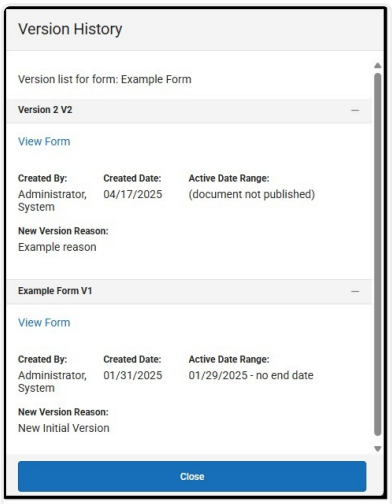
The new version of the form is not active until a **Start Date** is entered and that day has been reached. The previous version is automatically end-dated one day before the new version's start date. When a previous version is end-dated, **it no longer displays in the Custom Forms Setup List Screen**. An information icon next to the Start Date field explains future-dated versions: "Setting a start date for this form in the future makes the previous version of this form active until that future date. The end date of the previous version will automatically be set to one day before the start date of the new form version."



The Start Date information icon verbiage.

Version History side panel fields

The following table describes the fields available in the Version History side panel.

Field	Description	Image *Click to enlarge*
View Form	A download link to the PDF associated with this version.	 *The Version History side panel.*
Created By	The user who created this version.	
Created Date	The day the form was created.	
Active Date Range	The start date to the end date for this version.	
New Version Reason	The new version's reason description.	