





Custom Forms

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Options



Custom Forms

- ✓ Control of aesthetics
- ✓ Mail merge capabilities
- ✓ Data can be entered by staff, students and student contacts

Custom Tools

- ✓ Formerly known as custom tabs
- ✓ Quick to create
- ✓ Can be associated to non-student areas of Infinite Campus

The process



- ✓ Creating the form
- ✓ Designing the form in Adobe Professional
- ✓ Uploading the form to Infinite Campus
- ✓ Embedding mail merge fields and adding rules to the form
- ✓ Associating forms to students
- ✓ Extracting data from the form
- ✓ Managing change through form versioning

Creating the form



- ✓ Use an existing PDF document
- ✓ Create a new form in Word or Excel
 - ✓ *Personal preference is start with a document that has gridlines that can be hidden*
 - ✓ *Use a supported font* (Helvetica, Times New Roman, Courier)
 - ✓ *Verify spacing for mail merge and free form text entry*
 - ✓ *Verify and re-verify spelling, structure and data collection fields*

Designing the form in Adobe Professional



- ✓ Prepare a form (may have to view more at the bottom)
- ✓ Option to auto-detect form field
- ✓ Mass set font and font size
- ✓ Using preview to validate field height
- ✓ Mass set field height
- ✓ Align fields vertically and/or horizontally

Designing the form in Adobe Professional cont'd.



- ✓ Radio buttons vs. checkboxes
- ✓ Tips and tricks with drop-down menus
- ✓ Field sequencing for tabbing through the form
- ✓ Mail merge field displays

Uploading the form to Infinite Campus



- ✓ Blank Form vs. Interactive Form vs. Interactive Form with Database Table
- ✓ Display options
- ✓ eSignature options
- ✓ Overflow

Embedding mail merge fields and adding rules to the form



- ✓ Reserved field names + Ad Hoc fields
- ✓ Concatenating fields
- ✓ Is required and is required when
- ✓ Logic with date fields
- ✓ Staff and/or parent
- ✓ Overflow

Associating forms to students



- ✓ Individual association
- ✓ Batch association
 - ✓ Ad Hoc or section roster
- ✓ Requesting eSignature

Extracting data from the form



- ✓ Ad Hoc
 - ✓ Form Document, Custom Forms, Form Status eSign
- ✓ Printing en masse through batch association

Managing change through form versioning

- ✓ New data fields
- ✓ Change in mail merge location
- ✓ Spelling errors



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