

Custom Fields and Screens User Guide

PowerSchool 8.x
Student Information System

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This edition applies to Release 8.0.1 of the PowerSchool software and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

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Preface

Use this guide to assist you while navigating PowerSchool. This guide is based on the PowerSchool online help, which you can also use to learn the PowerSchool Student Information System (SIS) and to serve as a reference.

The PowerSchool online help is updated as PowerSchool is updated. Not all versions of the PowerSchool online help are available in a printable guide. For the most up-to-date information, click **Help** on any page in PowerSchool.

Referenced Sections

This guide is based on the PowerSchool online help, and may include references to sections that are not contained within the guide. See the PowerSchool online help for the referenced section.

Security Permissions

Depending on your security permissions, only certain procedures may be available to you.

Navigation

This guide uses the > symbol to move down a menu path. If instructed to “Click **File** > **New** > **Window**,” begin by clicking **File** on the menu bar. Then, click **New** and **Window**. The option noted after the > symbol will always be on the menu that results from your previous selection.

Notes

It is easy to identify notes because they are prefaced by the text “**Note:**.”

Introduction

PowerSchool provides tools to create custom fields and screens to display a variety of information about courses, sections, staff, and students. First, create the custom fields. Next, create the custom screen. Finally, add the custom fields to the custom screen.

ODBC/JDBC Access to Custom Fields

Once custom fields are created, you can then easily access that information using ODBC/JDBC. For more information, see the *PS_CustomFields API Guide* available on [PowerSource](#).

Custom Student Fields and Screens

Use custom Student Fields and Screens function to display a variety of information about students. PowerSchool supports the addition of up to 999 custom student fields. For example, create a page that includes vehicle-related information that you want to track for each student. First, create the custom fields. Next, create the custom screen. Finally, add the custom fields to the custom screen you create.

How to Add Custom Student Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Student Fields**. The Student Fields page appears.
4. Click **New**. The New Student Field page appears.
5. Use the following table to enter information in the fields:

Field	Description
Field Name	Enter the name of the field.
Description	Enter an explanation of the field and its purpose.

6. Click **Submit**. The Student Fields page displays the new field.

How to Edit Custom Student Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Student Fields**. The Student Fields page appears.
4. Click the name of the field you want to edit. The Edit Student Field page appears.
5. Edit the information as needed. For field descriptions, see *How to Add Custom Student Fields*.
6. Click **Submit**. The Student Fields page displays the edited field.

How to Delete Custom Student Fields

Deleting a custom field also deletes the field from any custom pages and the values of that field. If you manually entered the field on a PowerSchool page, you must manually remove the field from the page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Student Fields**. The Student Fields page appears.
4. Click the name of the field you want to delete. The Edit Student Field page appears.
5. Select the checkbox to confirm that you want to delete the field.

Note: If you do not select the checkbox and click **Delete**, the system displays a message indicating that the field was not deleted. Click **Back** to return to the previous page. Select the checkbox, and then click **Delete**.

6. Click **Delete**.
7. Click **Confirm Delete**. Do not leave the page until a message appears indicating that the process is complete. The Custom Field Deleted page appears.

Note: The system lists any PowerSchool pages that include the custom field. If any pages appear, you must manually remove the fields from those pages.

How to Add Custom Student Screens

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click **New**. The Edit Custom Student Screen page appears.
5. Enter the name of the screen in the Name field.
6. Click **Submit**. The Custom Student Screens page displays the new page.
7. Click **Edit Fields** next to the new screen. The List Custom Student Screen Fields page appears.
8. Click **New**. The Edit Field page appears.
9. Use the following table to enter information in the fields:

Field	Description
Label	Enter the name you want to appear for the field on the custom screen.
Field Name	<p>Enter the name of the field.</p> <p>To insert a PowerSchool field into this field:</p> <ol style="list-style-type: none"> 1. Click Fields to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the Filter field. Otherwise, leave blank. 3. Click the field you want to add. The Fields pop-up

Field	Description
	<p>closes and the selected field appears.</p> <p>Note: Database extension fields can be selected on the Fields pop-up. For more information, see <i>Database Extensions</i> in the <i>System Administrator User Guide</i> available on PowerSource.</p> <p>Note: To create a custom field, see <i>How to Add Custom Student Fields</i>.</p>
Sort Order	Enter a number to indicate the order in which you want this field to appear on the custom screen.
Input Type	<p>Use the pop-up menu to choose one of the following to determine the type of field you are creating:</p> <ul style="list-style-type: none"> • Entry field: A small field in which the user enters free text. • Static field: A field in which you cannot change the text. Use static fields to create headers above fields you want to group together, or to explain a field you place below it. • Checkbox: A checkbox a user clicks to select. • Pop-up menu: A pop-up menu from which a user selects a value. • Radio button: A small, round option button a user clicks to select. • Entry box: A large box in which users can enter multiple lines of free text.
Width	If you chose Entry field or Entry box at the Input Type field, enter the width in characters of the field or box.
Height	If you chose Entry box at the Input Type field, enter the height of the box in lines.
Data for Popup or Radio Buttons	If you chose Pop-up menu or Radio button at the Input Type field, enter the options the users can select at the field.

10. Click **Submit**. The List Custom Student Screen Fields page displays the field.
11. Repeat steps 8-10 for each field on the custom screen.

Note: For more information about viewing the custom screen, see *Custom Screens*.

How to Edit Custom Student Screens

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click the name of the custom screen in the Screen column. The Edit Custom Student Screen page appears.
5. Edit the name of the custom student screen in the Name field.
6. Click **Submit**. The Student Custom Screens page displays the edited screen.

How to Delete Custom Student Screens

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click the name of the custom screen in the Screen column. The Edit Custom Student Screen page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Edit Custom Student Screen Fields

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click **Edit Fields** next to the screen you want to edit. The List Custom Student Screen Fields page appears.
5. Click the field you want to edit. The Edit Field page appears.
6. Edit the information as needed. For field descriptions, see *How to Add Custom Student Screens*.
7. Click **Submit**. The List Custom Student Screen Fields page displays the edited field.

How to Delete Custom Student Screen Fields

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click **Edit Fields** next to the screen you want to edit. The List Custom Student Screen Fields page appears.
5. Click the field you want to edit. The Edit Field page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.

How to Export a Student Screen as a Template

Export a custom screen to share with other PowerSchool administrators or to save as a backup for the custom screen. In addition, by exporting a custom screen and then deleting it, you can remove a custom screen from the system without losing it permanently.

Note: The Custom Student Screens page is now also accessible via **Start > System > Page and Data Management > Custom Student Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Student Screens**. The Student Custom Screens page appears.
4. Click **Edit Fields** next to the screen to be exported as a template. The List Custom Student Screen Fields page appears.
5. Click **Export this screen as a template**. The File Download dialog appears.
6. Select **Save File As...** or **Save this file to disk**.
7. Click **OK**. The Save As dialog appears.
8. Select a file location.
9. Click **Save**. The custom screen saves as a template, and the List Custom Student Screen Fields page appears.

Custom Course Fields

Use custom Course Fields function to display a variety of information about courses. PowerSchool supports the addition of up to 999 custom course fields. For example, create a custom field called Demand to track last year's demand for a particular course. Create the custom course fields. Then, either add the custom fields to a page in PowerSchool or enter values for the fields using the Direct Database Access function, also known as Universal Search & Modify (USM).

How to Add Custom Course Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Course Fields**. The Course Fields page appears.
4. Click **New**. The New Course Field page appears.
5. Use the following table to enter information in the fields:

Field	Description
Field Name	Enter the name of the field.
Description	Enter an explanation of the field and its purpose.

6. Click **Submit**. The Course Fields page displays the new field.

How to Edit Custom Course Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Course Fields**. The Course Fields page appears.
4. Click the name of the field you want to edit. The Edit Course Field page appears.
5. Edit the information as needed. For field descriptions, see *How to Add Custom Course Fields*.
6. Click **Submit**. The Course Fields page displays the edited field.

How to Delete Custom Course Fields

Deleting a custom field deletes the field and its values. If you manually entered the field on a PowerSchool page, you must manually remove the field from the page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Course Fields**. The Course Fields page appears.
4. Click the name of the field you want to delete. The Edit Course Field page appears.
5. Select the checkbox to confirm that you want to delete the field.

Note: If you do not select the checkbox and click **Delete**, the system displays a message indicating that the field was not deleted. Click **Back** to return to the previous page. Select the checkbox, and then click **Delete**.

6. Click **Delete**.
7. Click **Confirm Delete**. Do not leave the page until a message appears indicating that the process is complete. The Custom Field Deleted page appears.

Note: The system lists any PowerSchool pages that include the custom field. If any pages appear, you must manually remove the fields from those pages.

Custom Section Fields

Use custom Section Fields function to display a variety of information about sections. PowerSchool supports the addition of up to 999 custom section fields. For example, create a custom field called Field Trip to identify the field trips taken during a particular section. Create the custom section fields. Then, either add the custom fields to a page in PowerSchool or enter values for the fields using the Direct Database Access function, also known as Universal Search & Modify (USM).

How to Add Custom Section Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Section Fields**. The Section Fields page appears.
4. Click **New**. The New Section Field page appears.
5. Use the following table to enter information in the fields:

Field	Description
Field Name	Enter the name of the field.
Description	Enter an explanation of the field and its purpose.

6. Click **Submit**. The Section Fields page displays the new field.

How to Edit Custom Section Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Section Fields**. The Section Fields page appears.
4. Click the name of the field you want to edit. The Edit Section Field page appears.
5. Edit the information as needed. For field descriptions, see *How to Add Custom Section Fields*.
6. Click **Submit**. The Section Fields page displays the edited field.

How to Delete Custom Section Fields

Deleting a custom field deletes the field and its values. If you manually entered the field on a PowerSchool page, you must manually remove it from the page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.

2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Section Fields**. The Section Fields page appears.
4. Click the name of the field you want to delete. The Edit Section Field page appears.
5. Select the checkbox to confirm that you want to delete the field.

Note: If you do not select the checkbox and click **Delete**, the system displays a message indicating that the field was not deleted. Click **Back** to return to the previous page. Select the checkbox, and then click **Delete**.

6. Click **Delete**.
7. Click **Confirm Delete**. Do not leave the page until a message indicates that the process is complete. The Custom Field Deleted page appears.

Note: The system lists any PowerSchool pages that include the custom field. If any pages appear, you must manually remove the fields from those pages.

Custom Staff Fields and Screens

Use custom Staff Fields and Screens function to display a variety of information about staff. PowerSchool supports the addition of up to 999 custom staff fields. For example, create a page that includes teacher certification fields to track this information for each teacher. First, create the custom fields. Then, create the custom screen. Finally, add the custom fields to the custom screen you created.

How to Add Custom Staff Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Staff Fields**. The Staff Fields page appears.
4. Click **New**. The New Staff Field page appears.
5. Use the following table to enter information in the fields:

Field	Description
Field Name	Enter the name of the field, such as address .
Description	Enter an explanation of the field and its purpose, such as Street Address .

6. Click **Submit**. The Staff Fields page displays the new field.

How to Edit Custom Staff Fields

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Staff Fields**. The Staff Fields page appears.
4. Click the name of the field you want to edit. The Edit Staff Field page appears.
5. Edit the information as needed. For field descriptions, see *How to Add Custom Staff Fields*.
6. Click **Submit**. The Staff Fields page displays the edited field.

How to Delete Custom Staff Fields

Deleting a custom field also deletes that field and its values from any custom pages. If you manually entered the field on a PowerSchool page, you must manually remove the field from the page.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Click **Staff Fields**. The Staff Fields page appears.
4. Click the name of the field you want to delete. The Edit Staff Field page appears.
5. Select the checkbox to confirm that you want to delete the field.

Note: If you do not select the checkbox and click **Delete**, the system displays a message indicating that the field was not deleted. Click **Back** to return to the previous page. Select the checkbox, and then click **Delete**.

6. Click **Delete**.
7. Click **Confirm Delete**. Do not leave the page until a message indicates that the process is complete. The Custom Field Deleted page appears.

Note: The system lists any PowerSchool pages that include the custom field. If any pages appear, you must manually remove the fields from those pages.

How to Add Custom Staff Screens

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click **New**. The Edit Custom Staff Screen page appears.
5. Enter the name of the screen in the Name field.
6. Click **Submit**. The Custom Staff Screens page displays the new page.
7. Click **Edit** next to the new screen. The List Custom Staff Screen Fields page appears.
8. Click **New**. The New Custom Staff Screen Fields: [Name] page appears.
9. Use the following table to edit information in the fields:

Field	Description
Label	Enter the name you want to appear for the field on the custom screen, such as Address .
Field Name	Enter the name of the field. To insert a PowerSchool field into this field: <ol style="list-style-type: none"> 1. Click Fields to view a list of PowerSchool fields. The Fields pop-up appears. 2. To narrow the list of fields, enter one of more search terms in the Filter field. Otherwise, leave blank.

Field	Description
	<p>3. Click the field you want to add. The Fields pop-up closes and the selected field appears.</p> <p>Note: Database extension fields can be selected on the Fields pop-up. For more information, see <i>Database Extensions</i> in the <i>System Administrator User Guide</i> available on PowerSource.</p> <p>Note: To create a custom field, see <i>How to Add Custom Staff Fields</i>.</p>
Sort Order	Enter a number to indicate the order in which you want this field to appear on the custom screen.
Input Type	<p>Use the pop-up menu to choose one of the following to determine the type of field you are creating:</p> <ul style="list-style-type: none"> • Entry field: A small field in which the user enters free text. • Static field: A field in which you cannot change the text that displays. Use static fields to create headers above fields you want to group together, or to explain a field you place below it. • Checkbox: A checkbox a user clicks to check. • Pop-up menu: A pop-up menu from which a user selects a value. • Radio button: Small, round option button a user clicks to select. • Entry box: A large box in which users can enter multiple lines of free text.
Width	If you chose Entry field or Entry box at the Input Type field, enter the width in characters of the field or box.
Height	If you chose Entry box at the Input Type field, enter the height of the box in lines.
Data for Popup or Radio Buttons	<p>If you chose Pop-up menu or Radio button at the Input Type field, enter the options the users can select at the field.</p> <p>A pop-up menu contains values, which consists of two segments. The first segment is the value that is stored in the database. This value is not visible on the Custom Screen page. The second segment is the label, which appears within the pop-up menu. The first and second segments use a semi-colon as a delimiter. To set a default value for a pop-up menu, enter a semi-colon as the delimiter and then enter an asterisk at the end of the default entry. The following is an example of a properly formatted data for a pop-up menu where "4;Both" is the</p>

Field	Description
	<p>default entry: 1;Mother 2;Father 3;Guardian 4;Both; * 5;Aunt 6;Uncle 0;Unknown</p> <p>A radio button follows the same rules as pop-up menu. The only difference is that with a pop-up menu, you can enter numerous sets of values and a default may not be defined. With a radio button, you are limited to only two sets of values.</p>

10. Click **Submit**. The Custom Staff Screen Fields: [Name] page displays the edited field.
11. Repeat steps 8-10 for each field on the custom screen.

Note: For more information about viewing the custom screen, see *How to Edit Custom Staff Screens*.

How to Edit Custom Staff Screens

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click the name of the custom screen in the Screen column. The Edit Custom Staff Screen page appears.
5. Edit the name of the custom staff screen in the Name field.
6. Click **Submit**. The Custom Staff Screens page displays the edited screen.

How to Delete Custom Staff Screens

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click the name of the custom screen in the Screen column. The Edit Custom Staff Screen page appears.
5. Click **Delete**.
6. Click **Confirm Delete**. The Selection Deleted page appears.

How to Edit Custom Staff Screen Fields

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click Edit next to the screen you want to edit. The Custom Staff Screen Fields: [Name] page appears.
5. Click the Label of the field you want to edit. The Edit Custom Staff Screen Field: [Name] page appears.
6. Edit the information as needed. For field descriptions, see *How to Add Custom Staff Screens*.
7. Click **Submit**. The Custom Staff Screen Fields: [Name] page displays the edited field.

How to Delete Custom Staff Screen Fields

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.
3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click **Edit** next to the screen you want to edit. The Custom Staff Screen Fields: [Name] page appears.
5. Click the Label of the field you want to delete. The Edit Custom Staff Screen Field: [Name] page appears.
6. Click **Delete**.
7. Click **Confirm Delete**. The Selection Deleted page appears.

How to Export a Staff Screen as a Template

Export a custom screen to share with other PowerSchool administrators or to save as a backup. In addition, by exporting a custom screen and then deleting it, you can remove a custom screen from the system without losing it permanently.

Note: The Custom Staff Screens page is now also accessible via **Start > System > Page and Data Management > Custom Staff Screens**.

1. On the start page, choose **System** under Setup in the main menu. The System Administrator page appears.
2. Under Data Management, click **Custom Fields/Screens**. The Custom Fields/Screens page appears.

3. Under Page Management, click **Custom Staff Screens**. The Custom Staff Screens page appears.
4. Click **Edit Fields** next to the screen to be exported as a template. The Custom Staff Screen Fields: [Name] page appears.
5. Click **Export this screen as a template**. The File Download dialog appears.
6. Select **Save this file to disk**.
7. Click **OK**. The Save As dialog appears.
8. Select a file location.
9. Click **Save**. The custom screen saves as a template, and the Custom Staff Screen Fields: [Name] page appears.