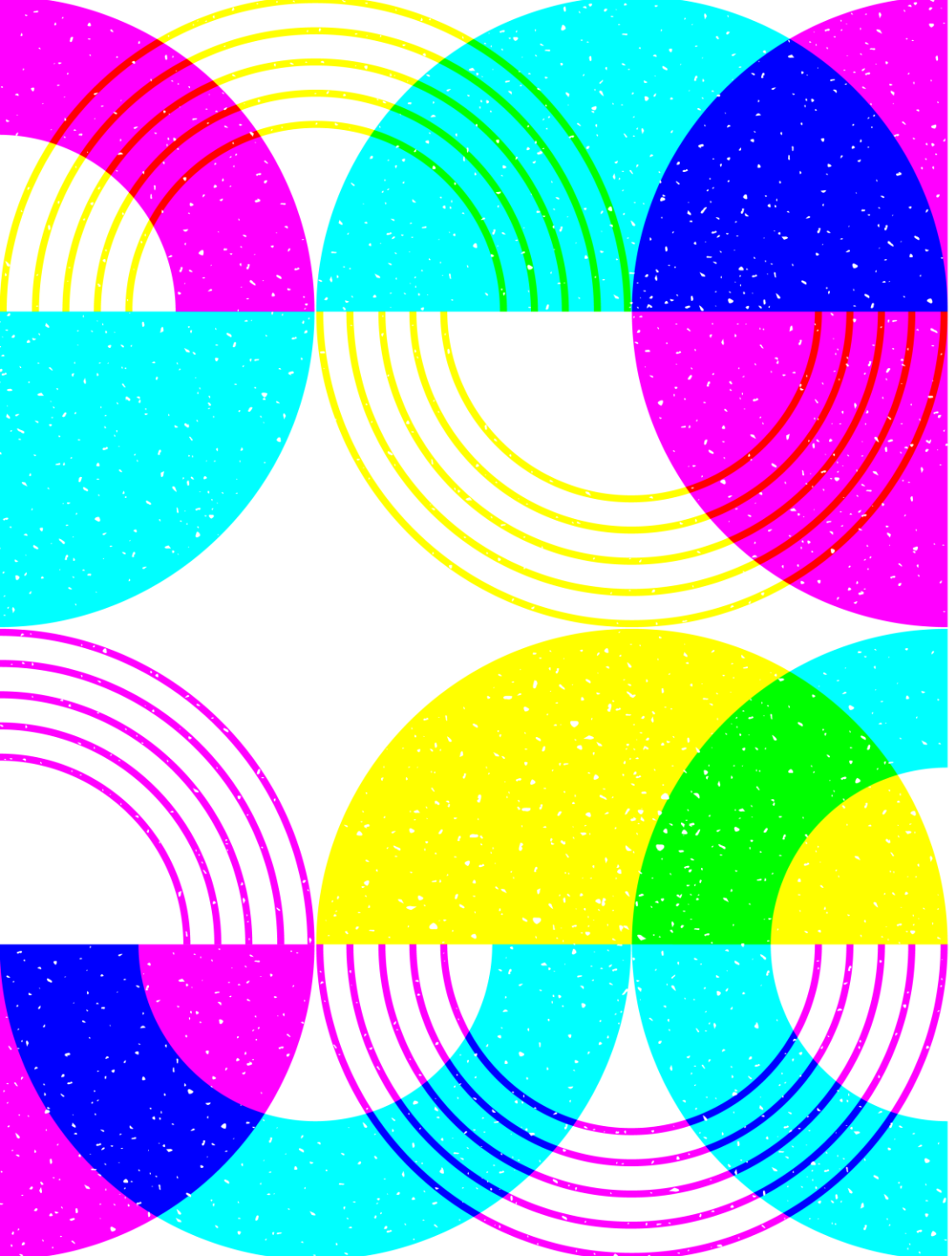


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SKYWARD®

iCON

Tailor-Made Tech: Unlocking Qmlativ's Customization Power for your ERP

Deb Ramlow, Product Line Manager

Product Takeaways from iCon 2026

Share your feedback with Skyward Product via Microsoft Forms!

https://forms.office.com/r/xy8dRDFHtU?origin=lprLink

What is Customization?

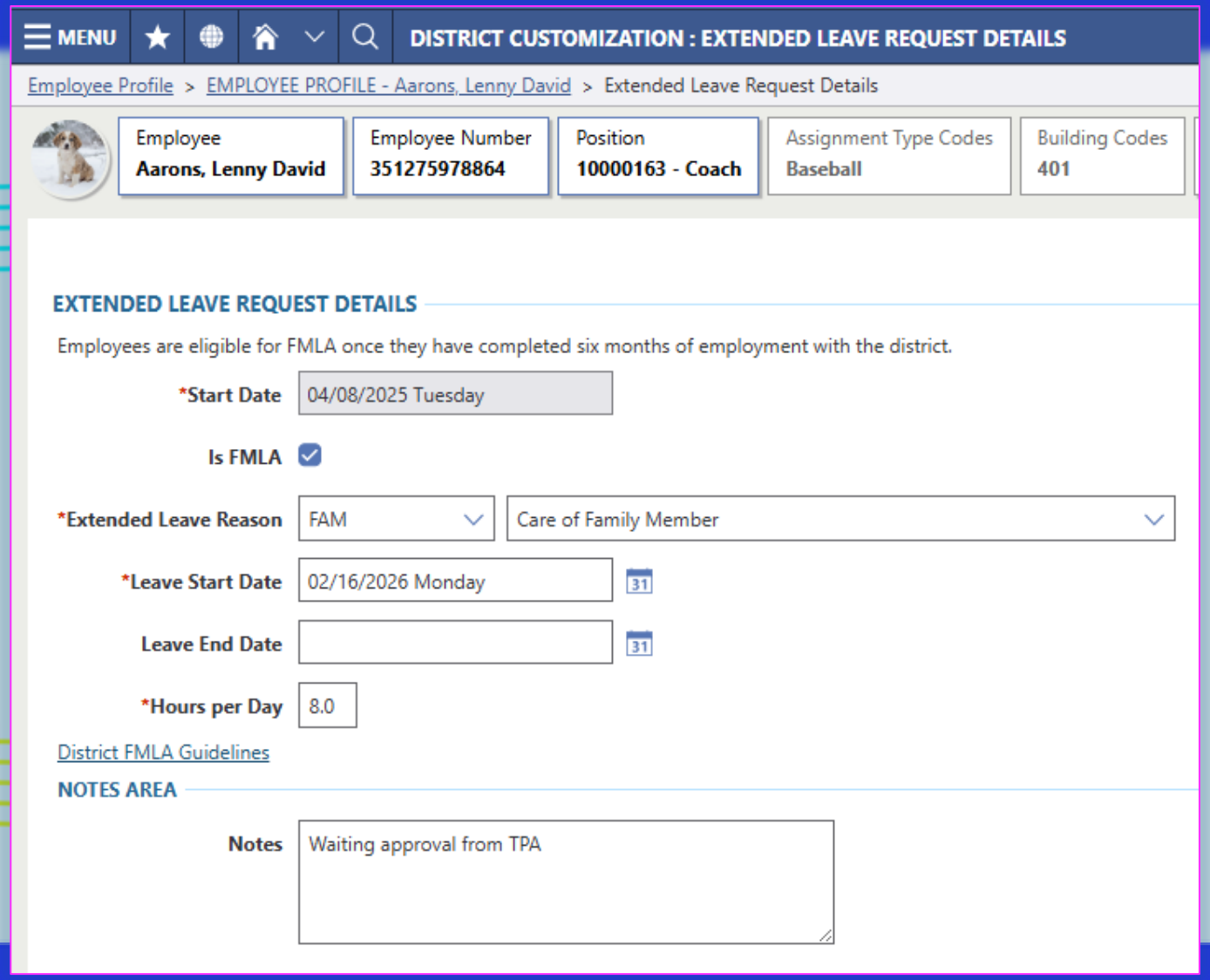
- Allows districts to create their own fields, objects, and screens when the system doesn't already provide what they need.

- SMS > Qmlativ – Create screens for migrated SMS custom forms.
  - Data migrates to Qmlativ as Custom Objects but screens need to be created.

First Step in Creating Custom Screen: PLAN!

1. Where do you want the screen to live?
2. What fields will be on the screen?
3. Do you want any of those fields to be code lists?
4. If the screen is in the Employee Profile, will an employee have one of these records or many?
5. Does the employee have a record for each fiscal year?
6. Do you want the screen available in Employee Access?

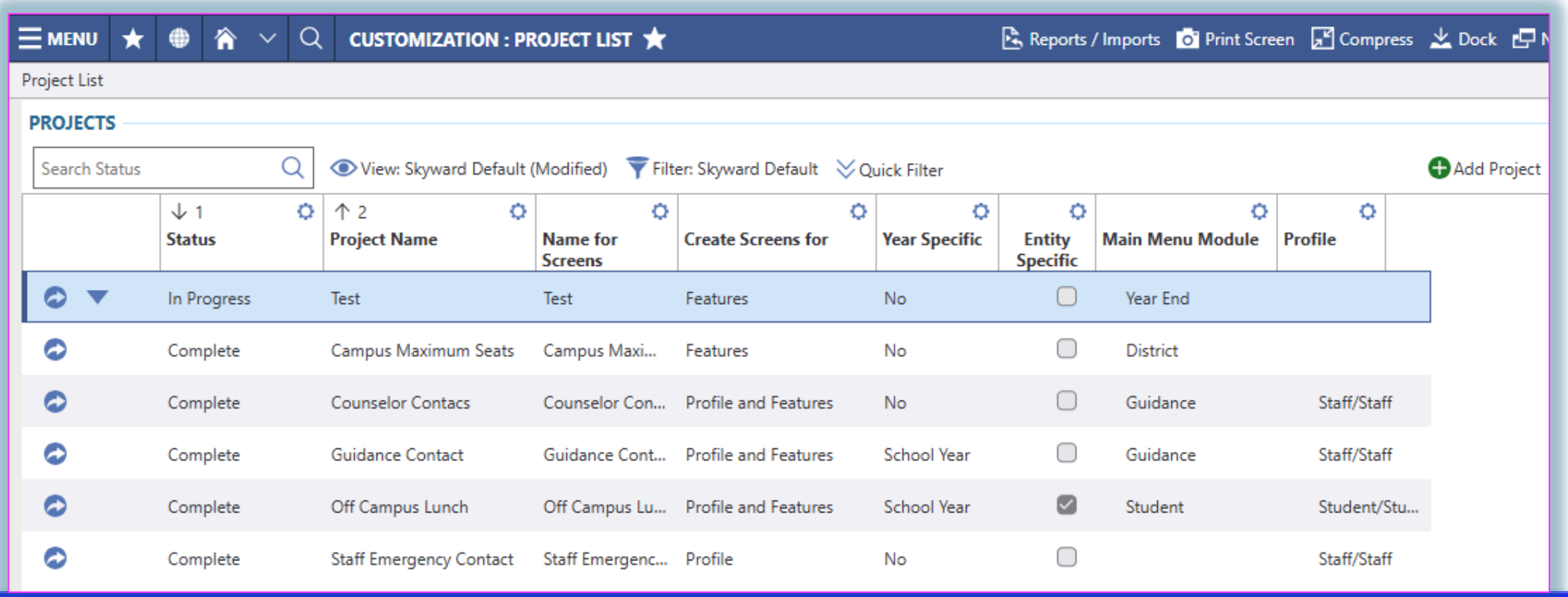
Example – Extended Leave Request



1. Screen lives on Employee Profile and Feature list.
2. Records are not per fiscal year.
3. Records are not per entity.
4. Fields:
   - Employee Start Date,
   - Is FMLA or not,
   - Leave Reason,
   - Start/End dates,
   - Hours per Day, and
   - Notes.
5. Leave Reason will be a Code List.
6. Include a link to the policy.
7. Employees could have many of these (list screen).

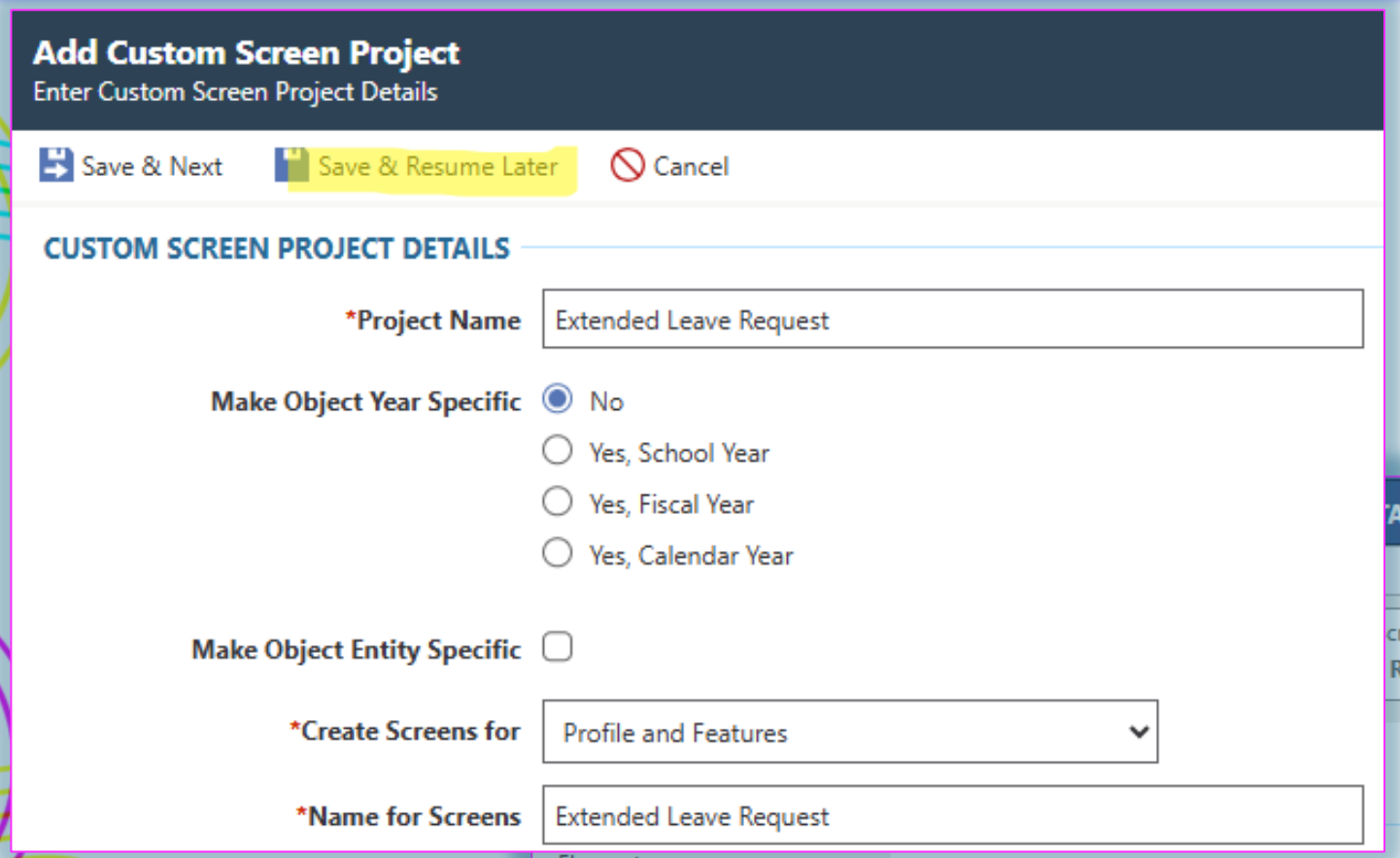
Customization Project

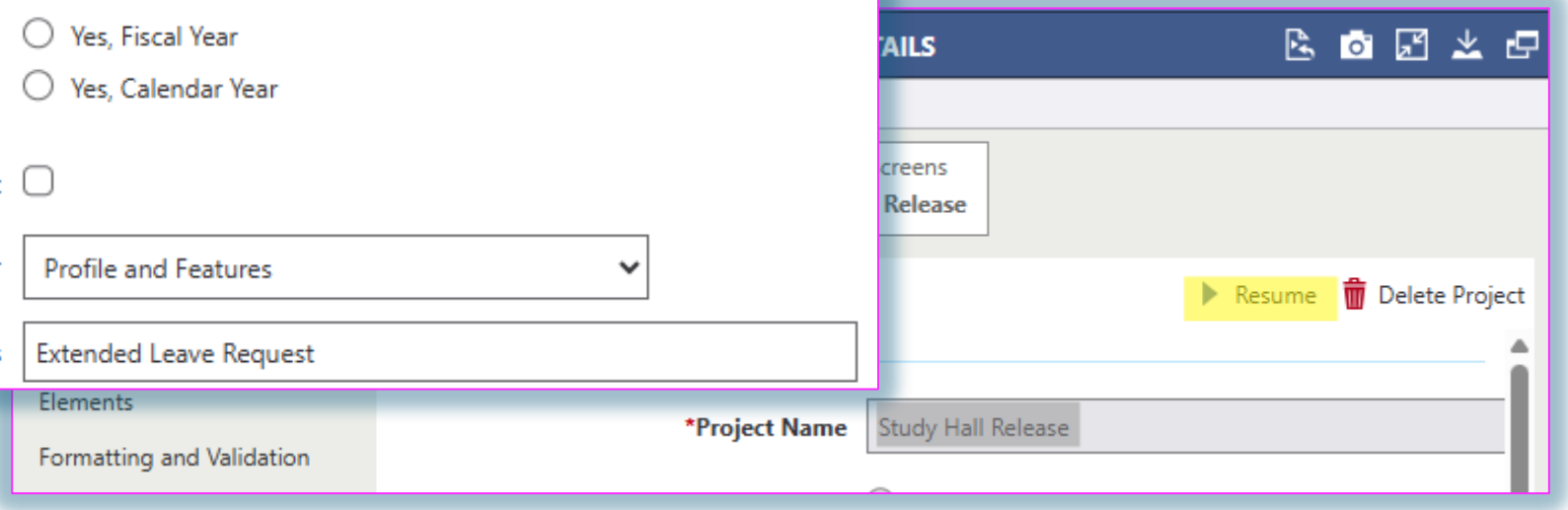
- Use Customization Project for a step-by-step workflow to building a new screen with new fields. (Not used for migrated data).



	1 Status	2 Project Name	Name for Screens	Create Screens for	Year Specific	Entity Specific	Main Menu Module	Profile
	In Progress	Test	Test	Features	No	☐	Year End	
	Complete	Campus Maximum Seats	Campus Maxi...	Features	No	☐	District	
	Complete	Counselor Contacs	Counselor Con...	Profile and Features	No	☐	Guidance	Staff/Staff
	Complete	Guidance Contact	Guidance Cont...	Profile and Features	School Year	☐	Guidance	Staff/Staff
	Complete	Off Campus Lunch	Off Campus Lu...	Profile and Features	School Year	☑	Student	Student/Stu...
	Complete	Staff Emergency Contact	Staff Emergenc...	Profile	No	☐		Staff/Staff

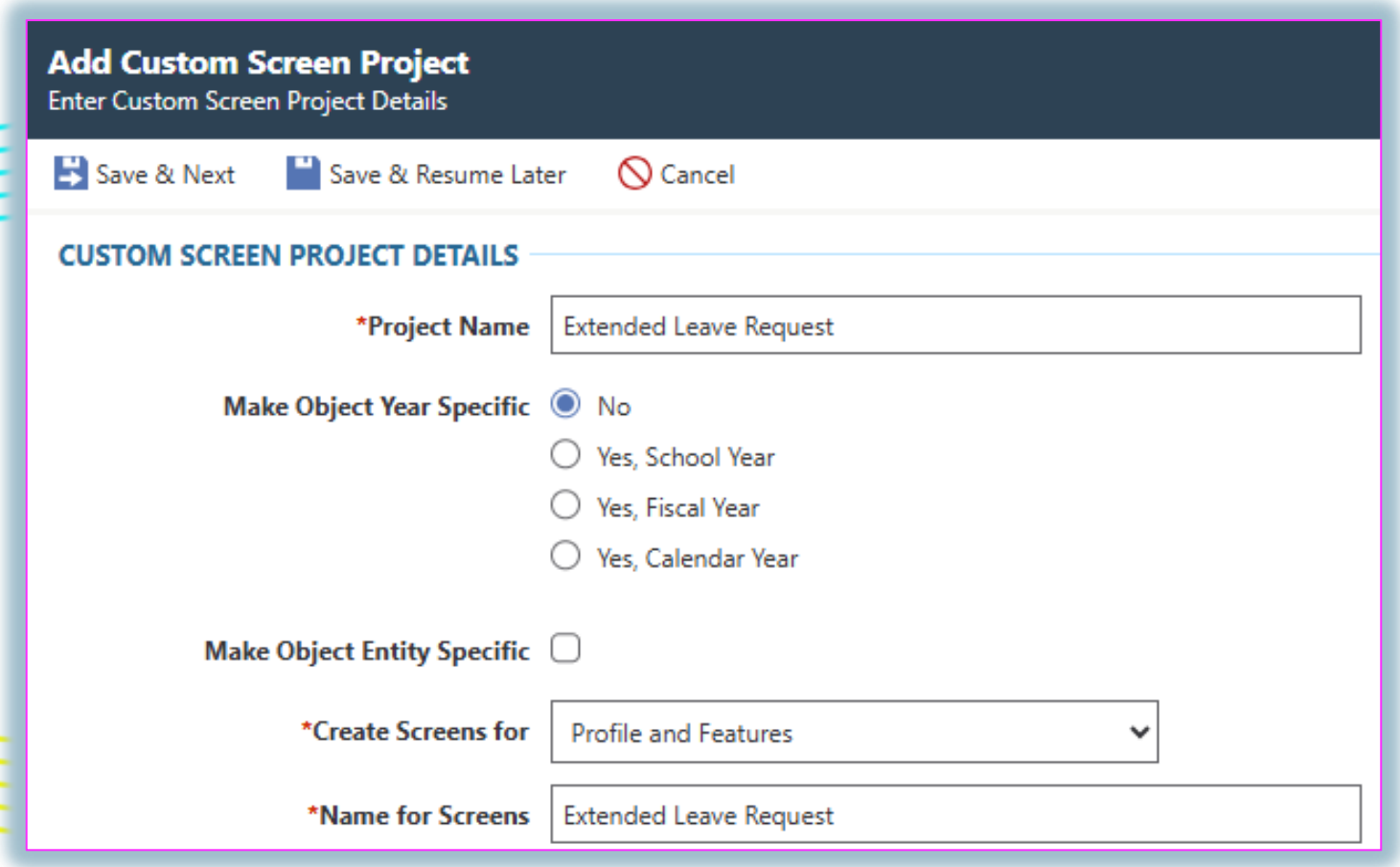
Pause and Resume





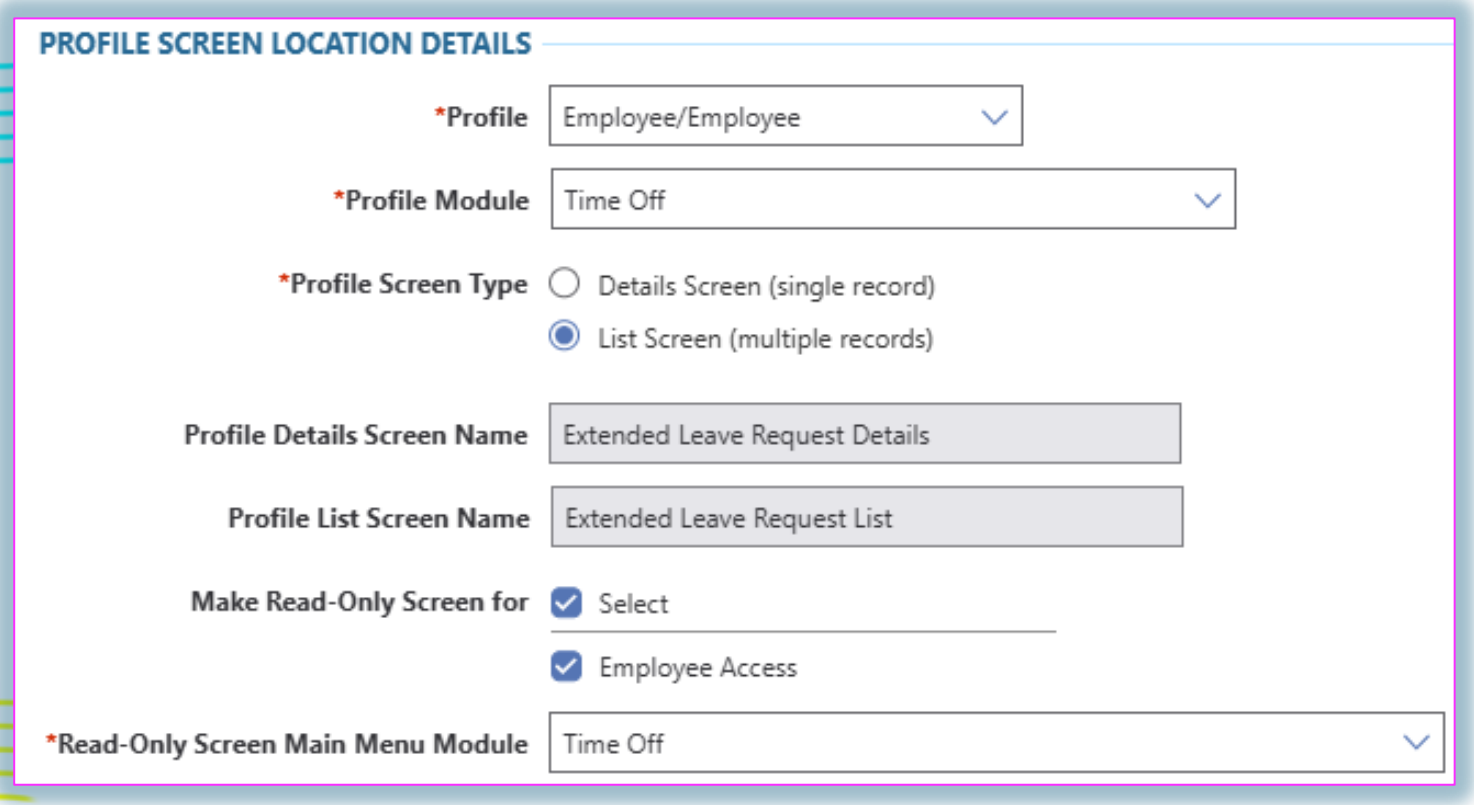
- Pause the process and resume later without losing any progress.

Project – Custom Screen Details



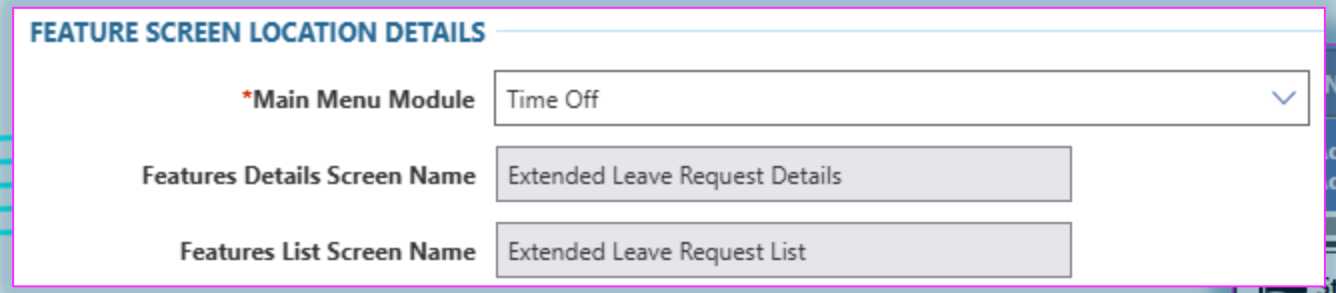
- Select Fiscal Year to have the record be year specific.
- Check Entity Specific if the record applies to a certain entity.
- Screens can be Profile only, Feature only or both.

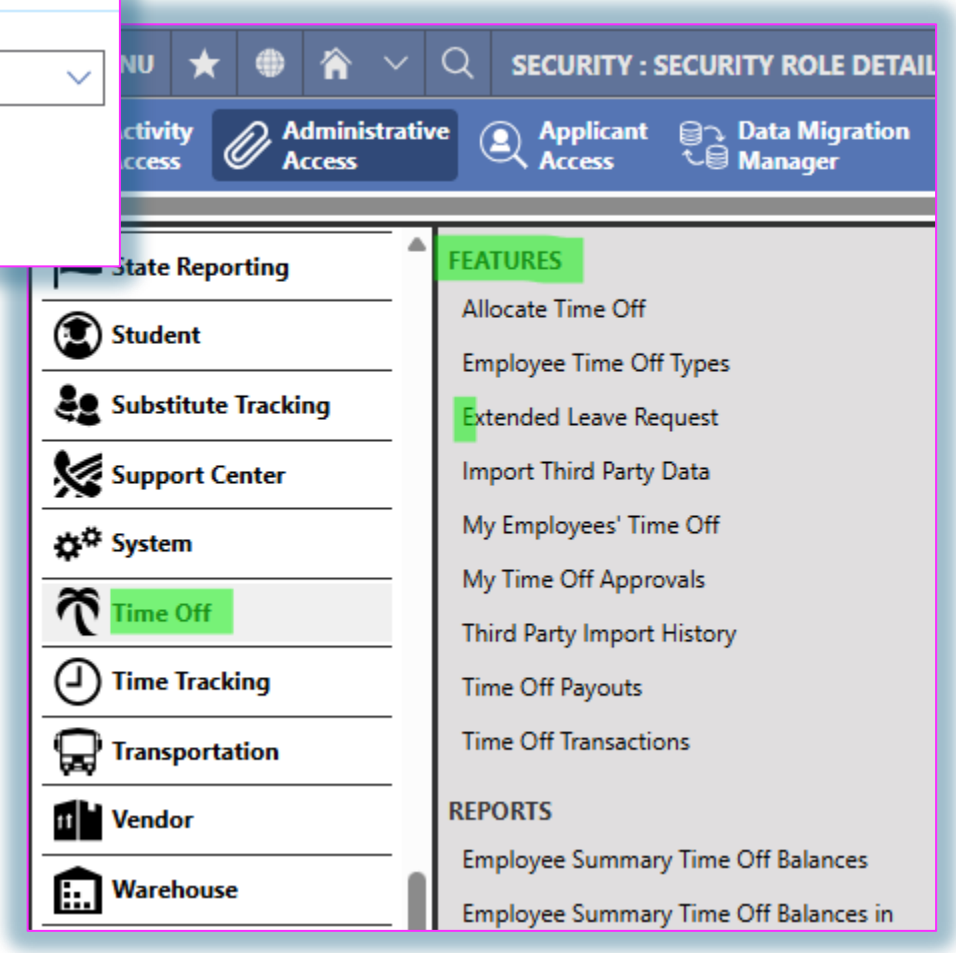
Project – Profile Screen Details



- Profile Module – select an existing module or create a new one.
- Employees could have multiple leave requests during their employment, so we will allow multiple records per employee (list screen).
- Choose if you want the screen to show in Employee Access.

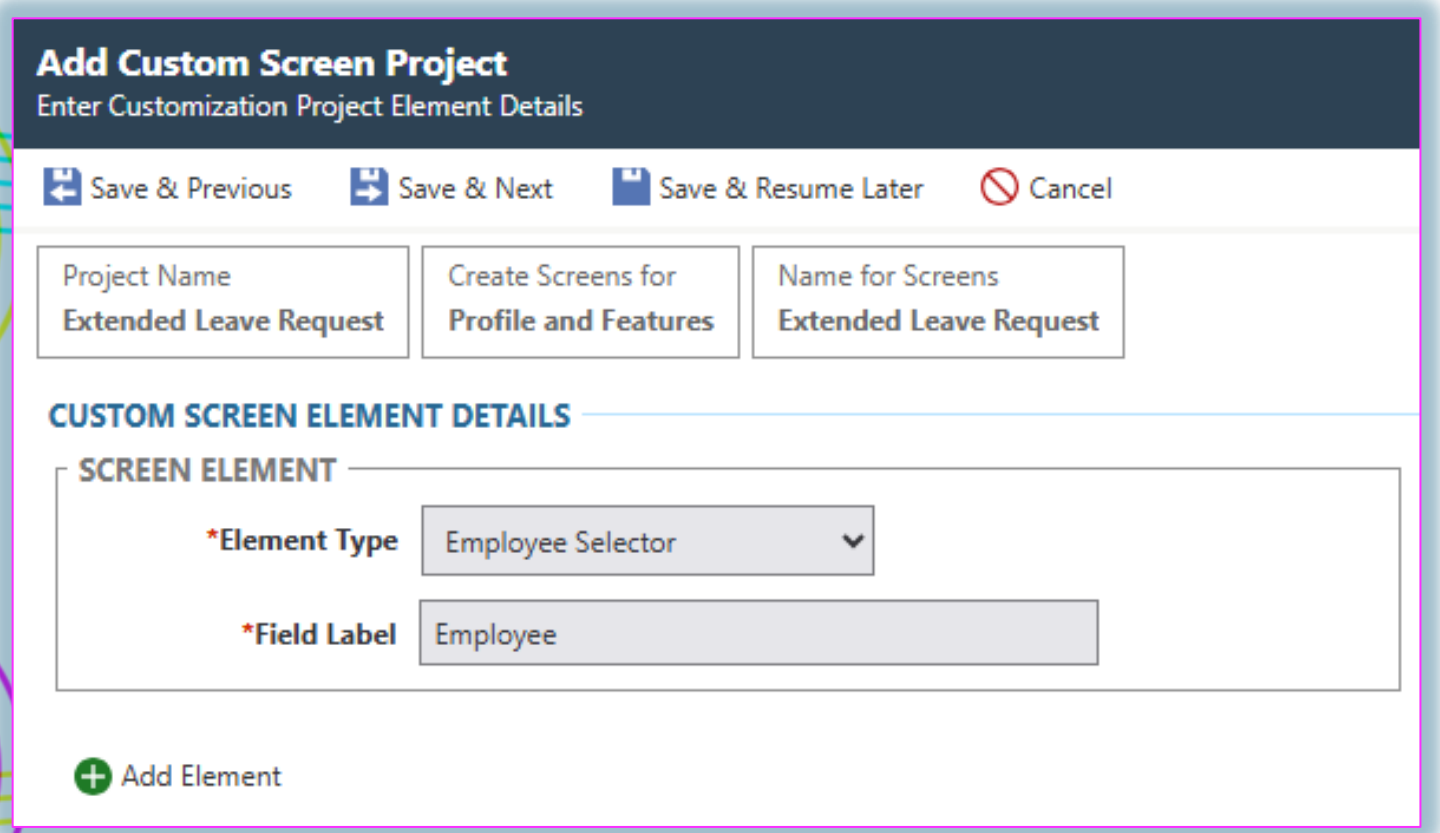
Project – Feature Screen Details





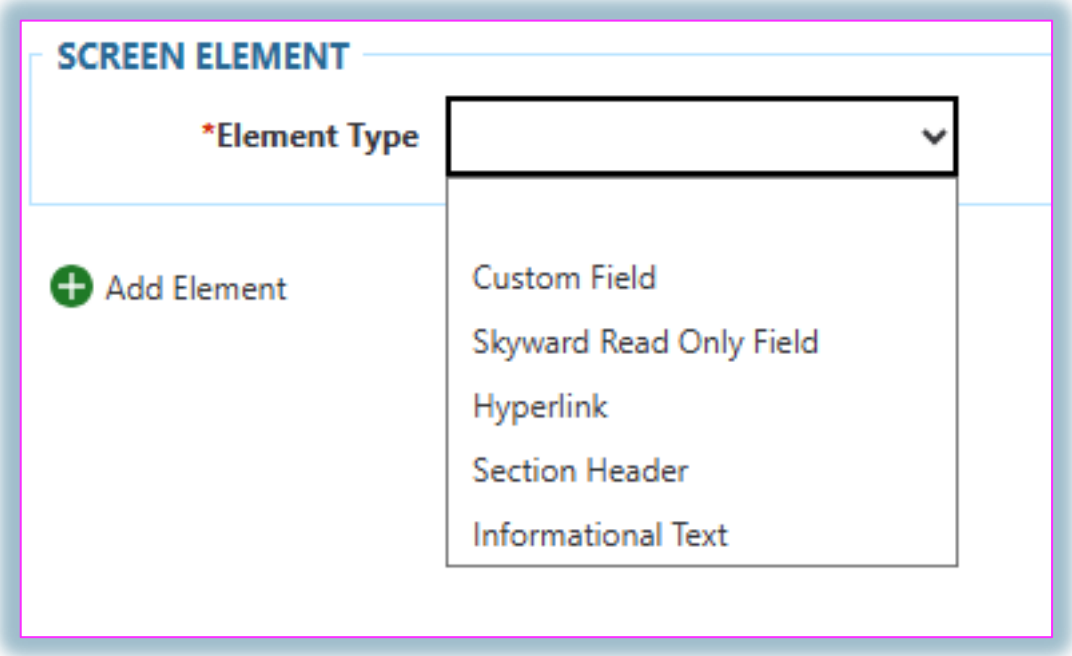
- Main Menu Module – select an existing module or create a new one.
- Screen Names are pre-filled using the name of the project.

Creating Elements



- The workflow automatically added **Employee** as a field based on the profile we selected in the detail setup.
- Use **Add Element** to add additional fields.

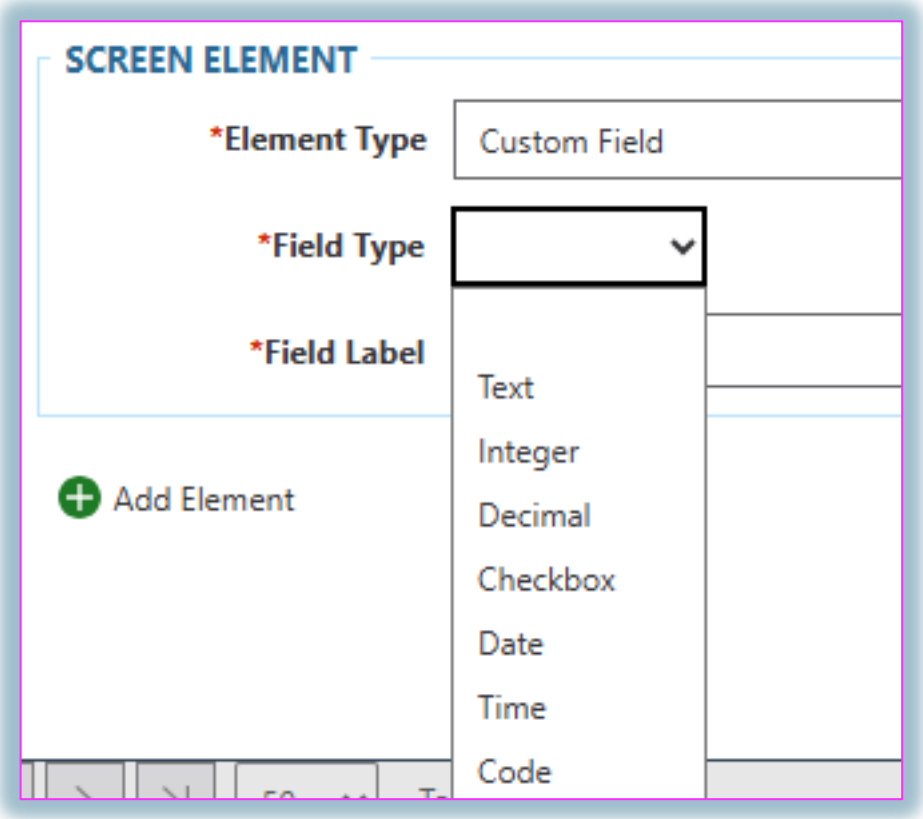
Add Elements



An **Element** is an individual field or placed on a custom screen to display or collect data. Types include:

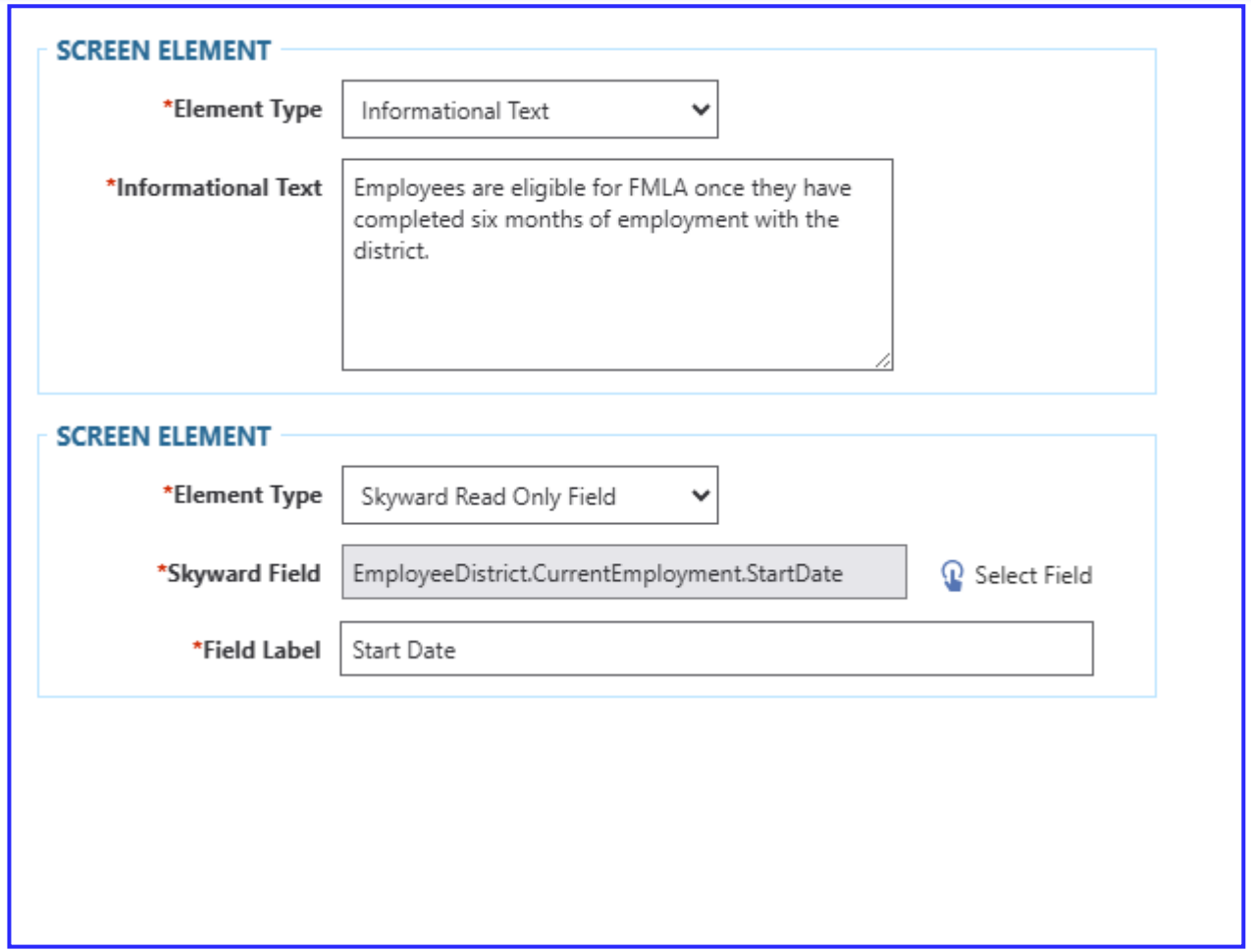
- **Custom Field** creates a new field in an object (table).
  - Can be accessed in Report Designer.
- **Skyward Read Only Field** adds an existing Skyward field, but the value cannot be changed on this screen.
- **Hyperlink** links to the URL specified.
- **Section Header** creates separation for grouping like-fields together.
- **Informational Text** can be used for instructions or clarifying details.

Project – Custom Field Types



- There are 7 types of custom fields.
- Each type has different options for display and validation specific to that type of field.

Project – Adding Elements



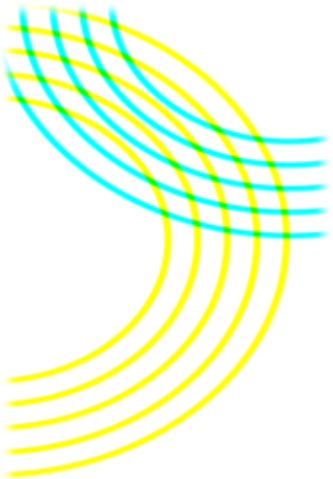
Additional elements:

- Informational Text

Fields:

- Employee Start Date,
- Is FMLA or not,
- Leave Reason,
- Start/End dates,
- Hours per Day, and
- Notes.

Project – Adding Elements





SCREEN ELEMENT

*Element Type: Custom Field

*Field Type: Checkbox

*Field Label: Is FMLA

SCREEN ELEMENT

*Element Type: Custom Field

*Field Type: Code

Code: New Code / Existing Code

Include Description: ☑

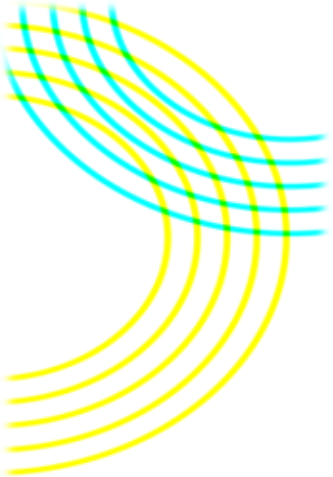
*Menu Module Location: Time Off

*Field Label: Extended Leave Reason

Fields:

- Employee Start Date,
- Is FMLA or not,
- Leave Reason,
- Start/End dates,
- Hours per Day, and
- Notes.

Project – Adding Elements





SCREEN ELEMENT

*Element Type: Custom Field

*Field Type: Date

*Field Label: Leave Start Date

SCREEN ELEMENT

*Element Type: Custom Field

*Field Type: Date

*Field Label: Leave End Date

SCREEN ELEMENT

*Element Type: Custom Field

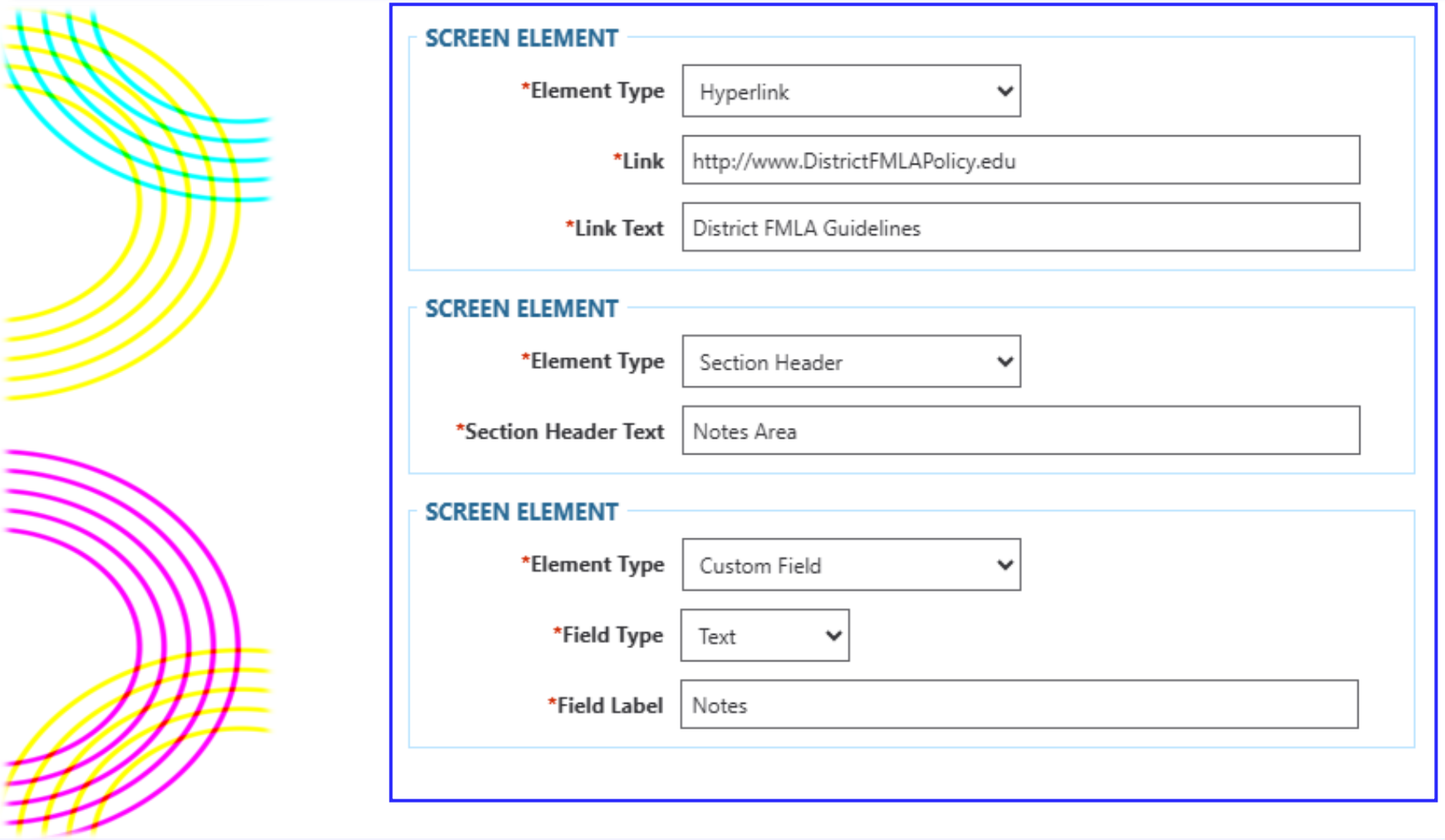
*Field Type: Decimal

*Field Label: Hours per Day

Fields:

- Employee Start Date,
- Is FMLA or not,
- Leave Reason,
- Start/End dates,
- Hours per Day, and
- Notes.

Project – Adding Elements



Additional elements:

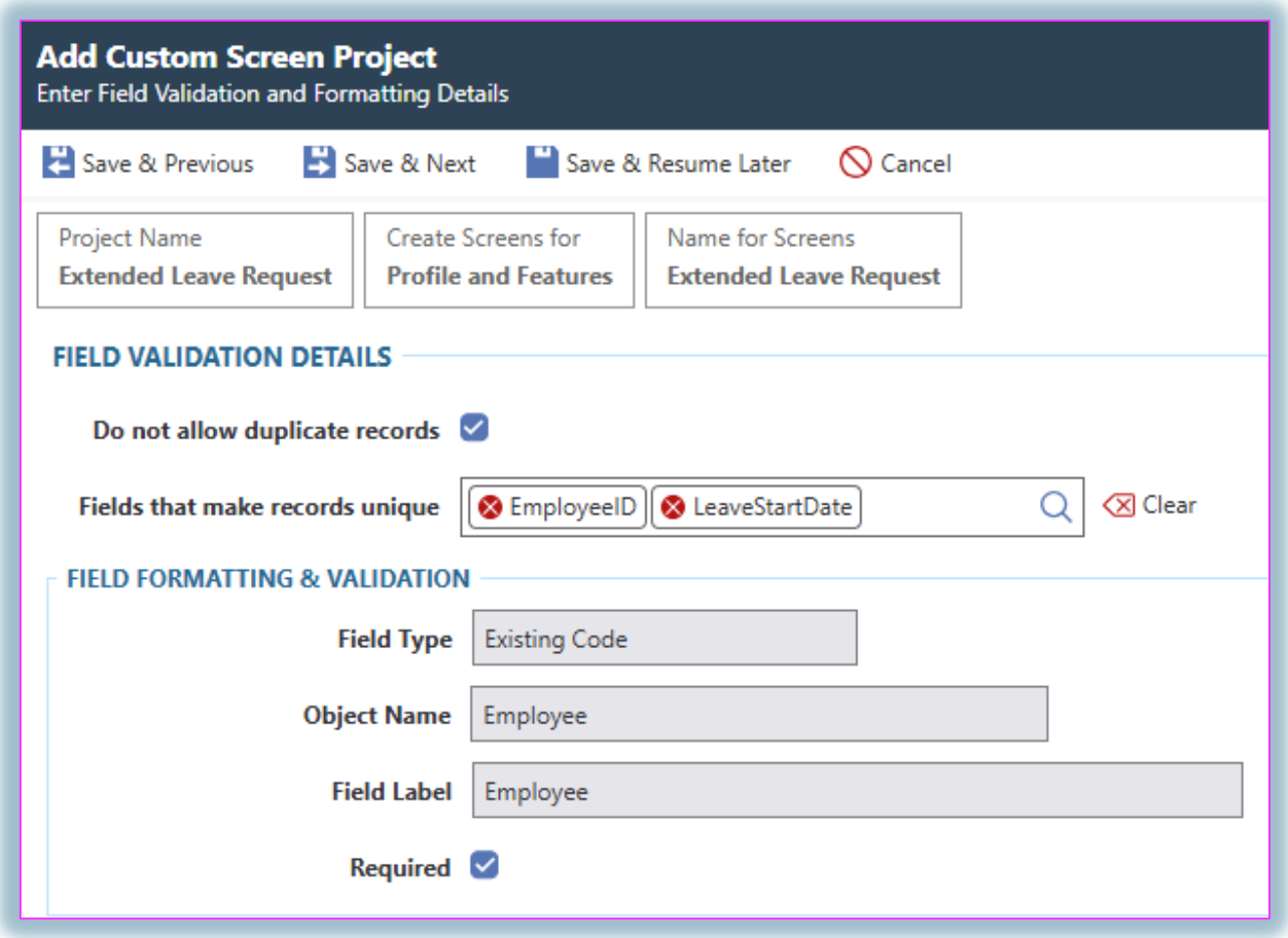
- Hyperlink
- Section Header

Fields:

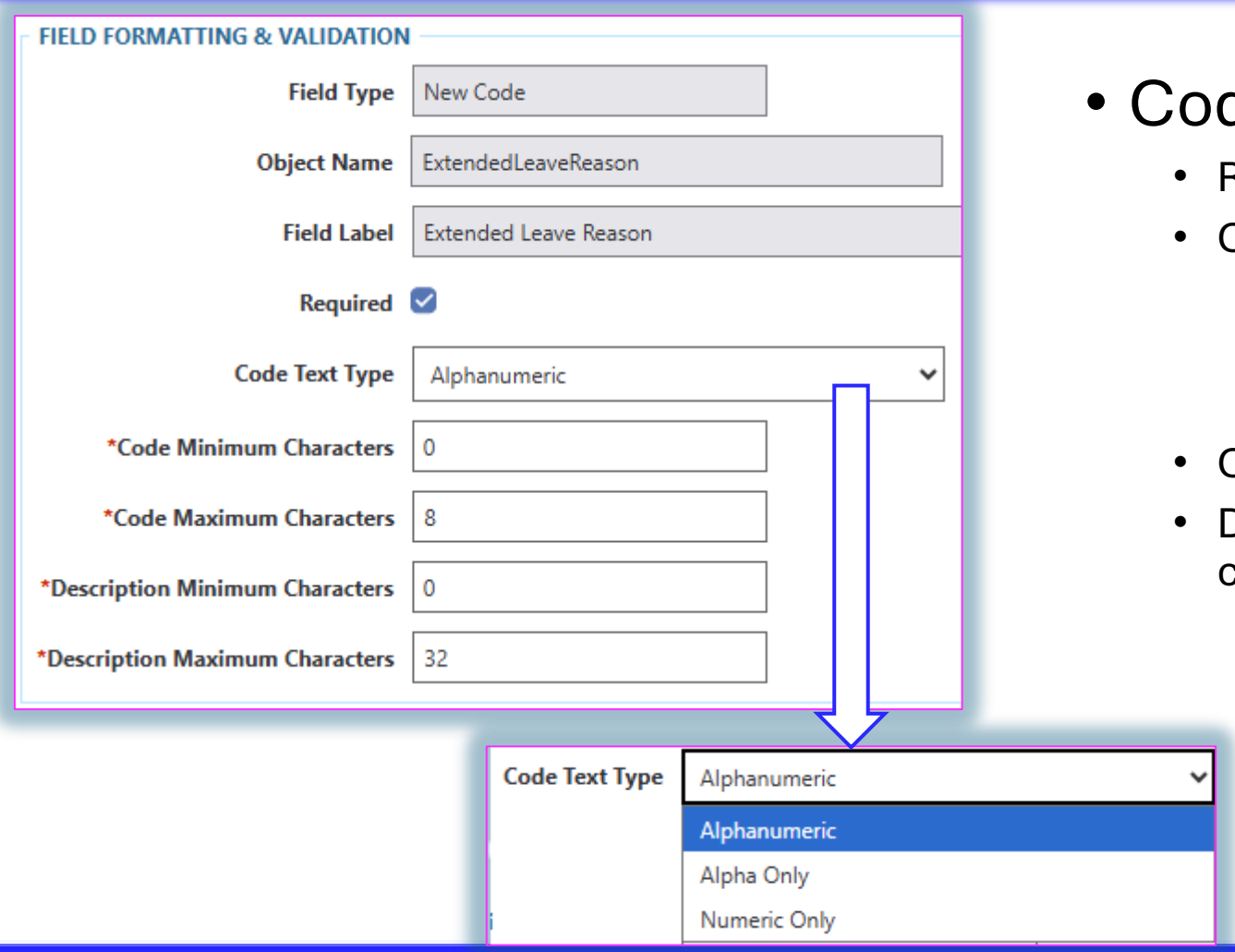
- Employee Start Date,
- Is FMLA or not,
- Leave Reason,
- Start/End dates,
- Hours per Day, and
- Notes.

Validation & Formatting

- Do not allow duplicate records
  - Select the combination of fields that must be unique from other records in the system.
- Employee
  - Required is the only validation allowed on “Existing Codes”

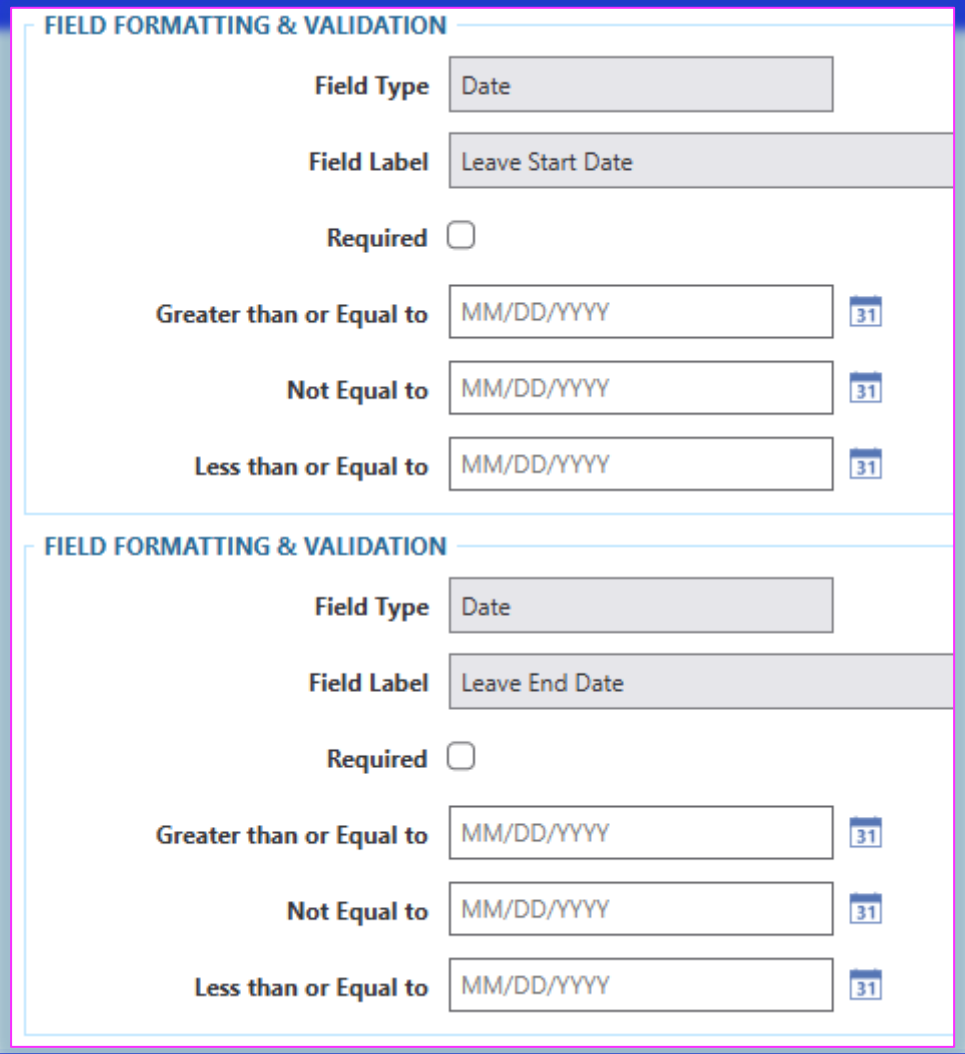


Validation & Formatting



- Code Fields
  - Required
  - Code Text Type Allowed
    - Letters (and limited symbols)
    - Numbers
    - Combination of both
  - Code Min/Max number of characters
  - Description Min/Max number of characters

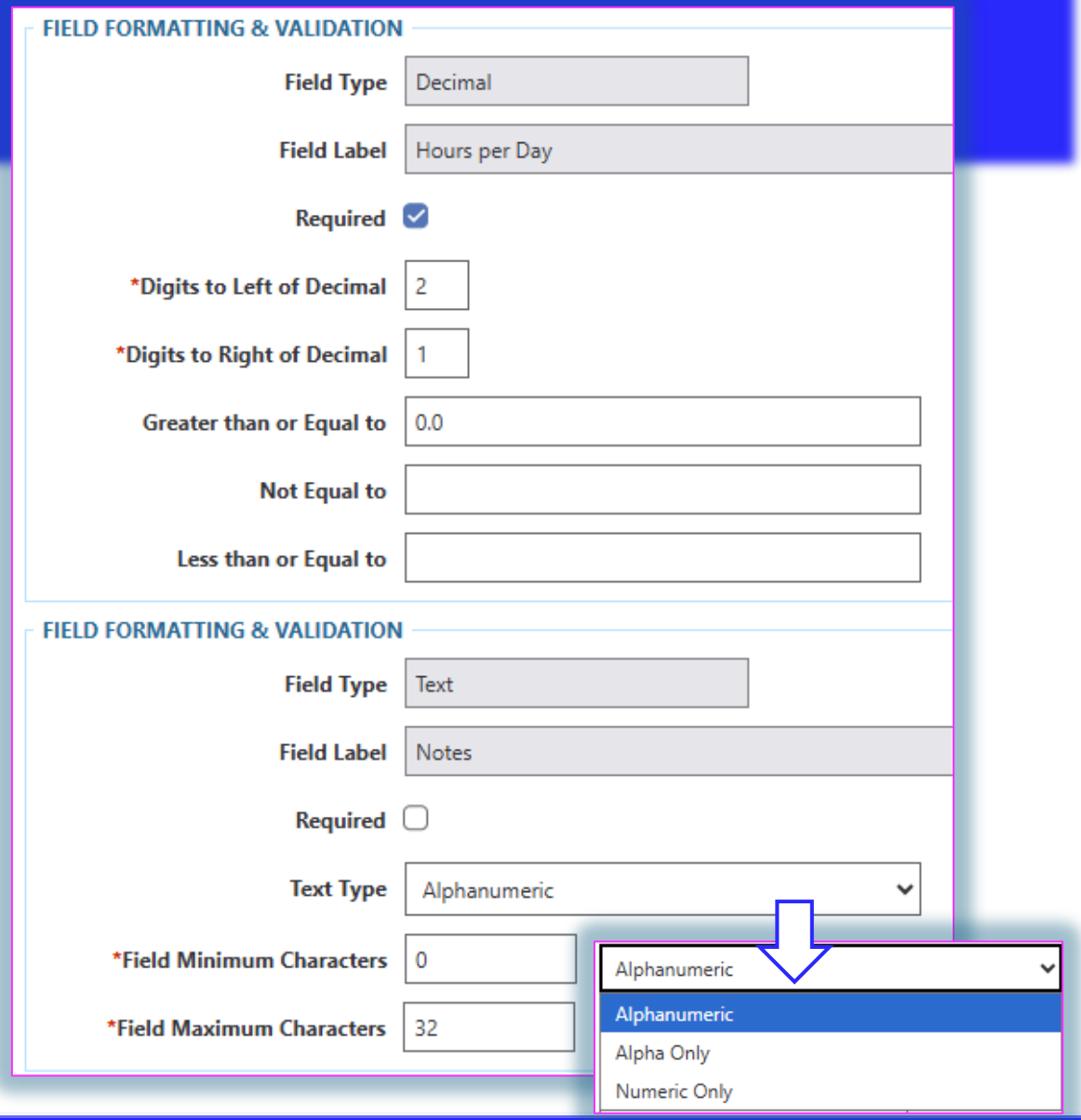
Validation & Formatting



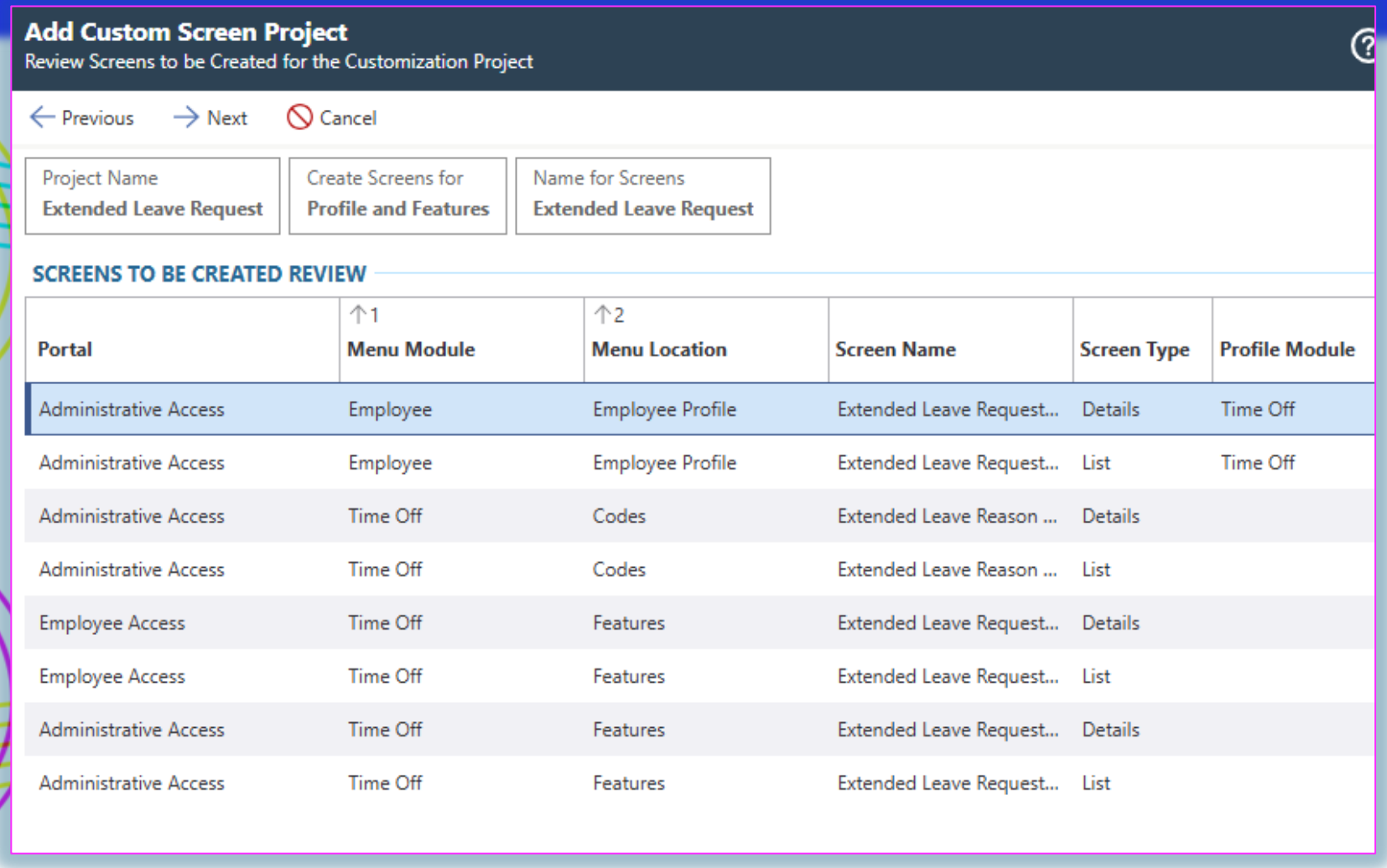
- Date Fields
  - Required
  - Date Value Validations

Validation & Formatting

- Decimal Fields
  - Required
  - Digits Left/Right of Decimal
  - Value limitations
- Text Fields
  - Required
  - Text Type
    - Letters (and limited symbols)
    - Numbers
    - Combination of both
  - Min/Max number of characters



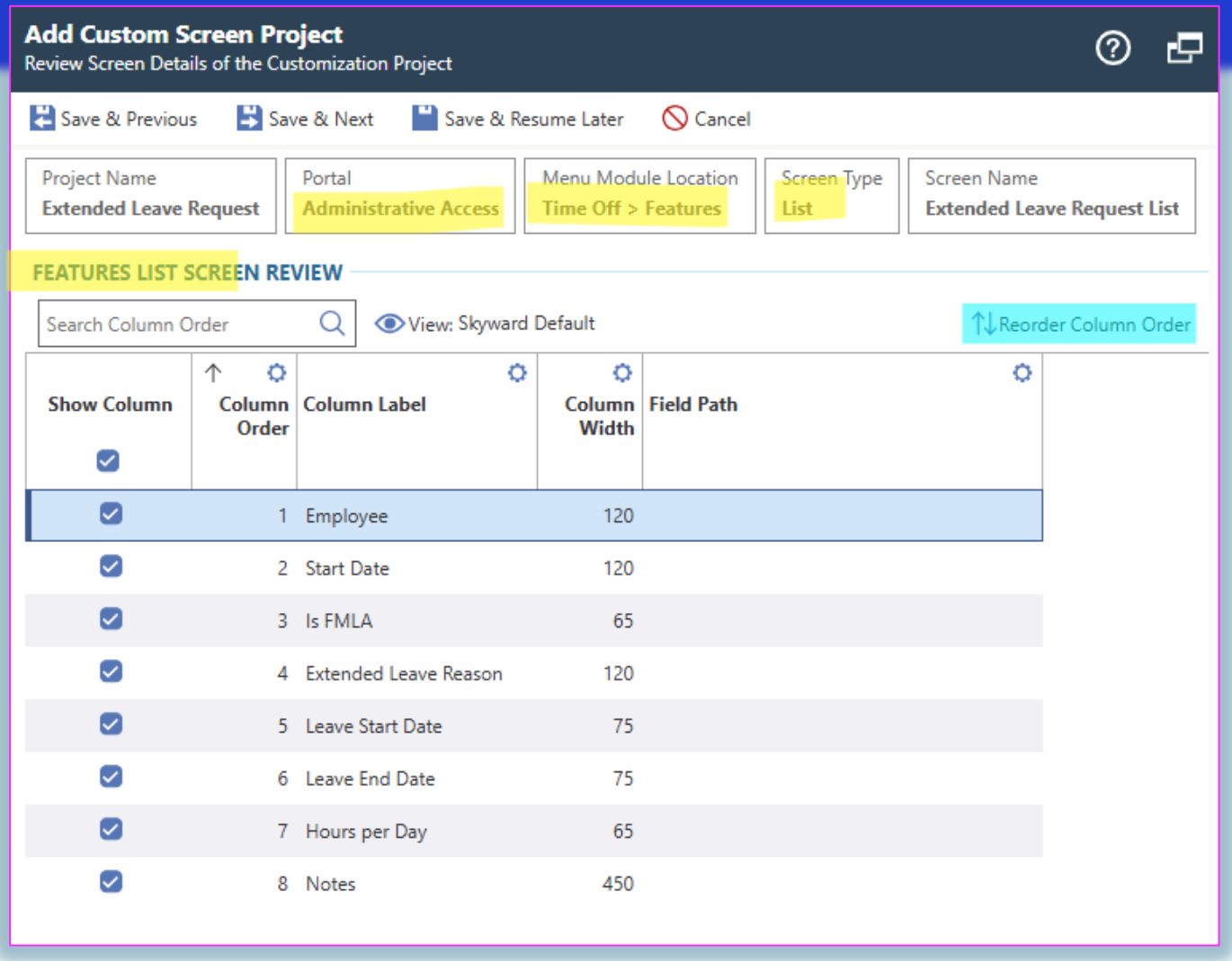
Review Screens to be Created



- List of screens to be created, their location and type.

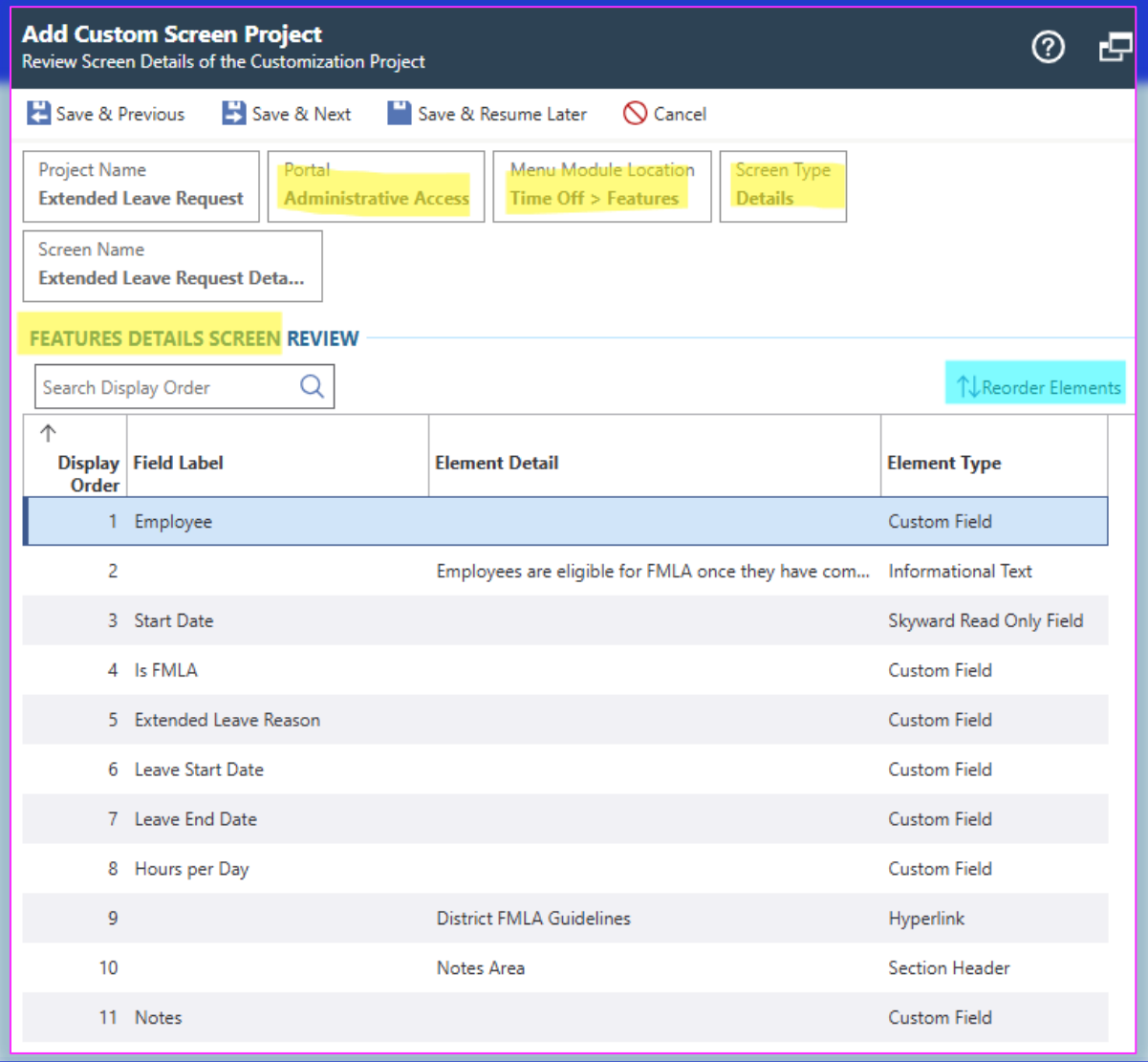
List Screen Settings

- Note the Screen Location and Type
- Change column labels and width, if desired
- Deselect any fields you do not want on the list screen by default.
- Reorder the field columns, if desired.



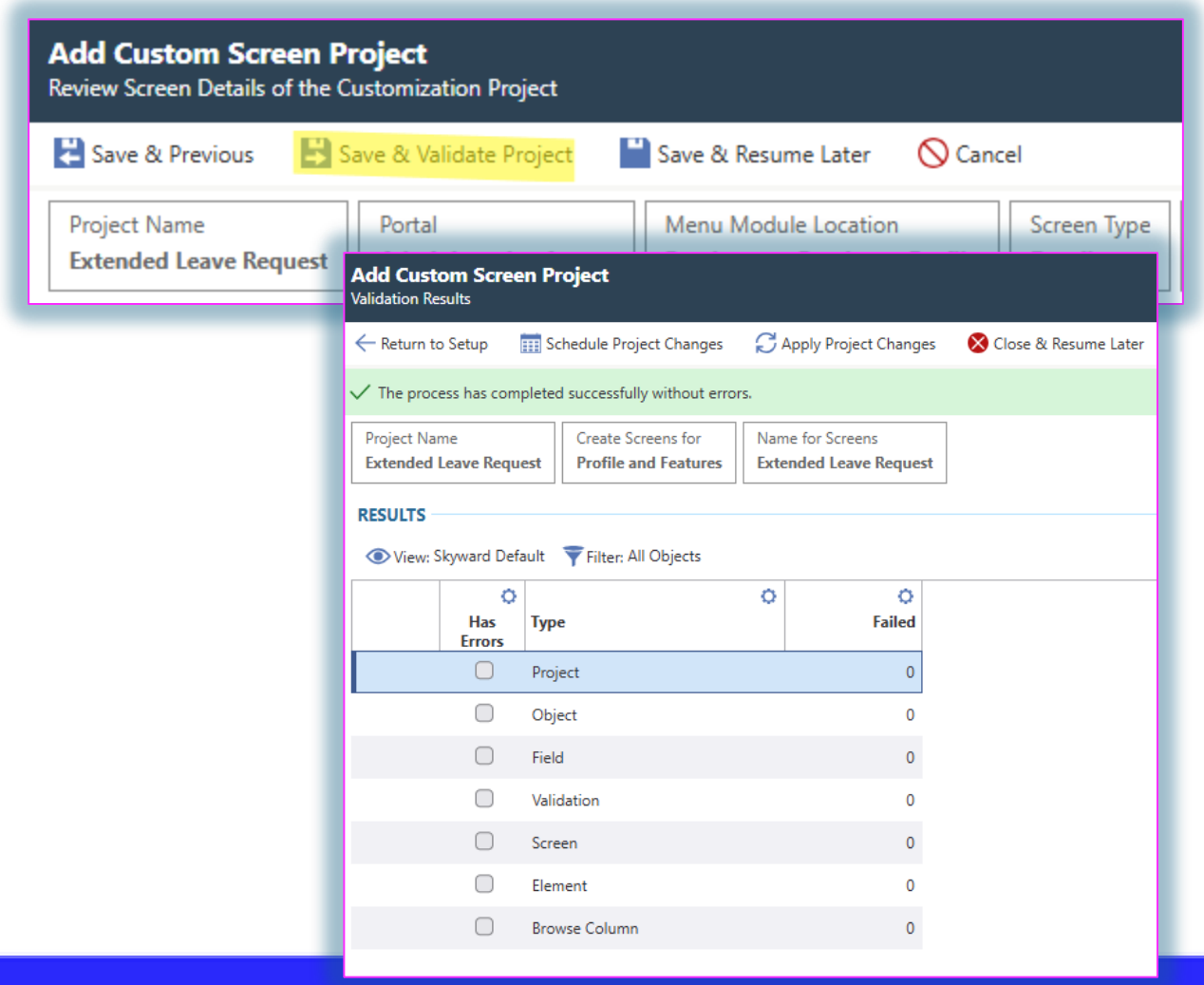
Detail Screen Settings

- Note the Screen Location and Type
- Change the field label, if desired.
- Reorder the field columns, if desired.

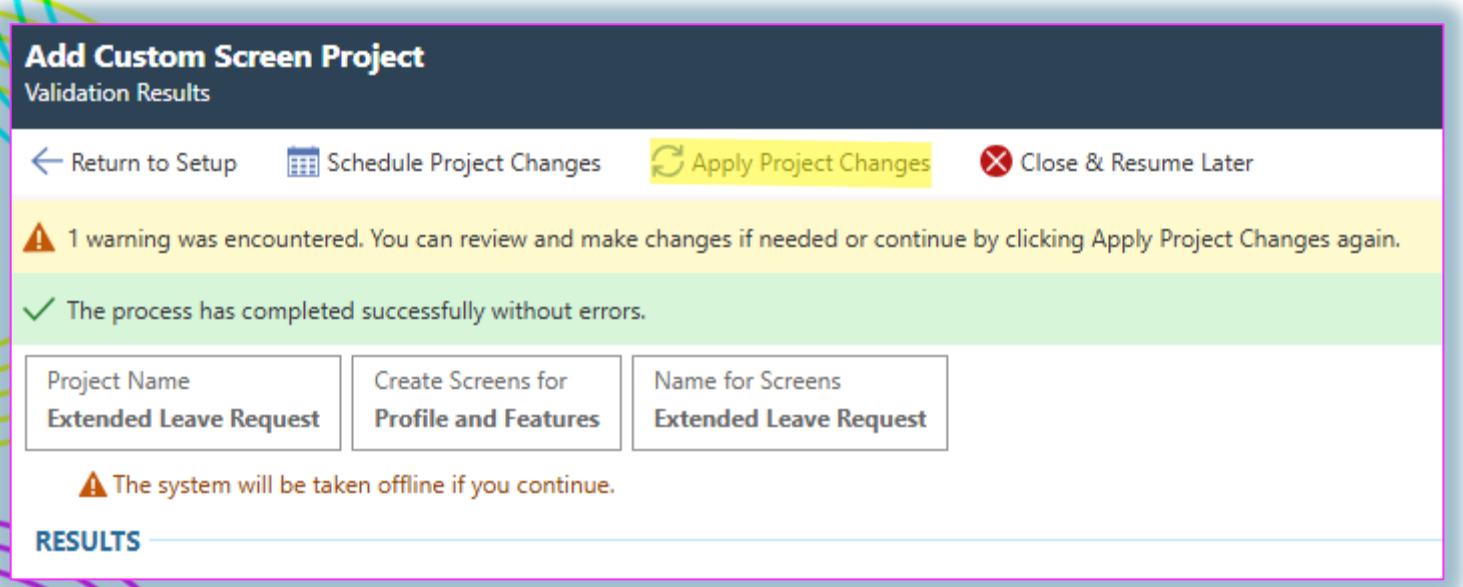


Validating the Project

- Once you have completed the screen review process for all List and Details screens, click Save & Validate Project.
- **Validation** runs through the settings to this point and ensures there are no errors.

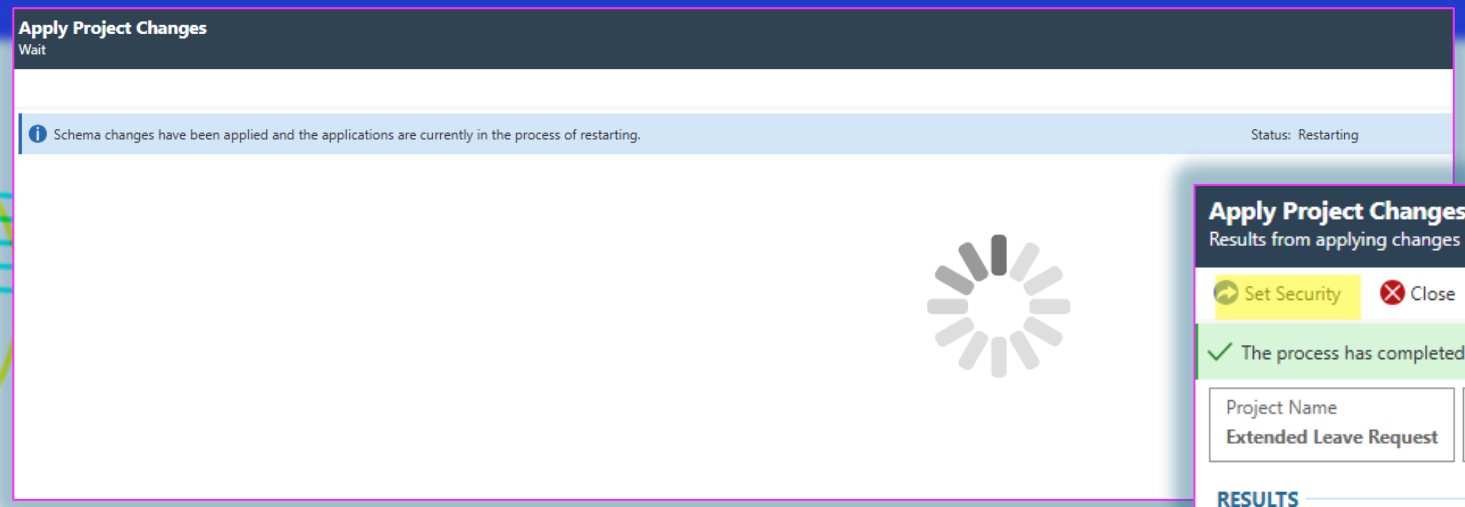


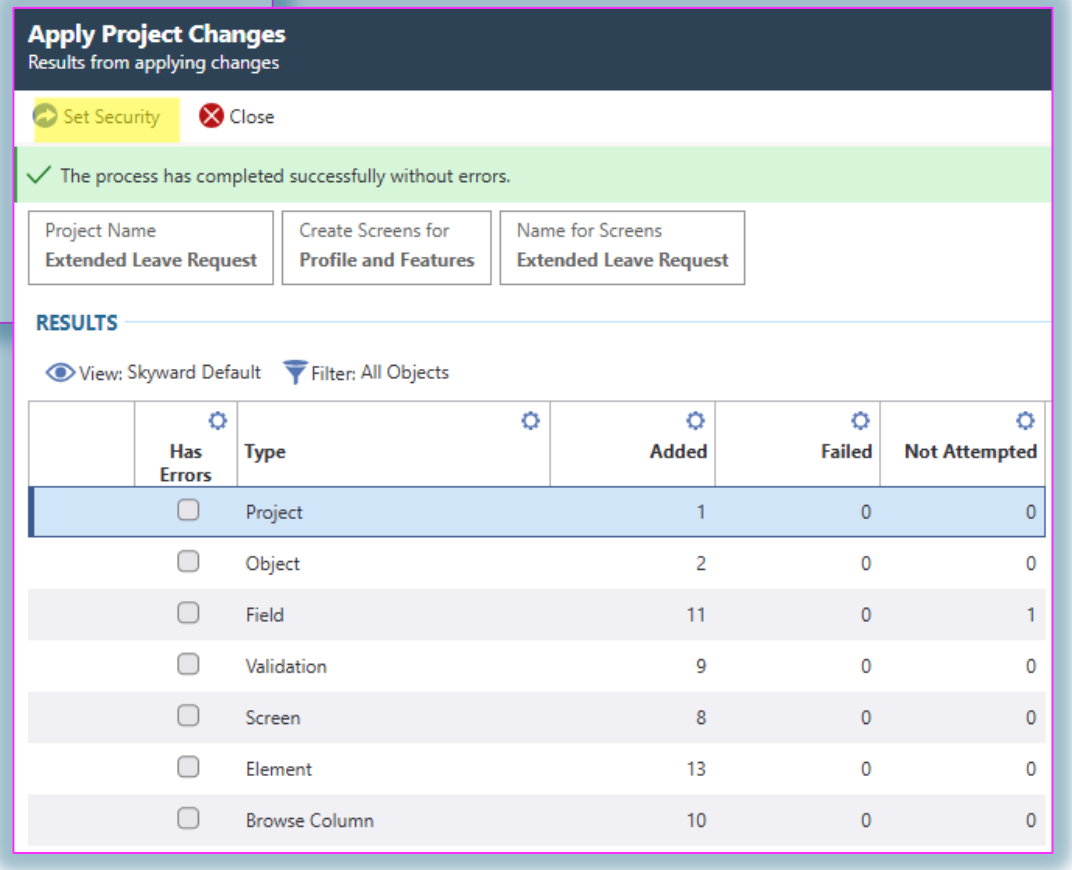
Applying Project Changes



- Once you are ready to call the project done, a process to apply the changes needs to run to create the new objects and fields.
- This process takes down the database and will log all users out of the system.
- Use **Schedule Project Changes** to schedule the process, or
- **Apply Project Changes** to run the process immediately.

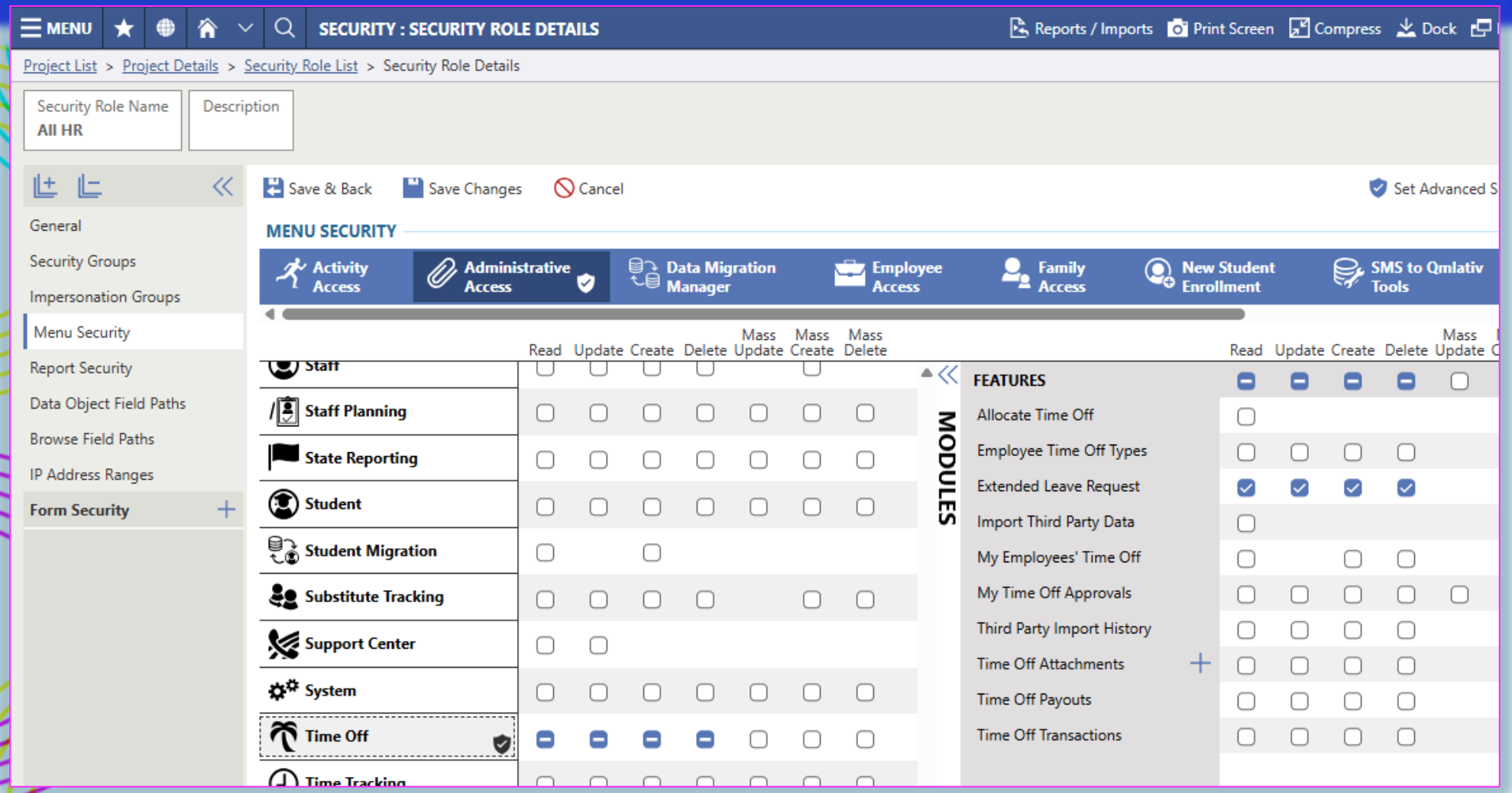
Apply Project Changes





- The screen above appears while the Apply Project Changes process is running.
- When it completes successfully, the screen to the right will appear.
- Setting security is the next step.

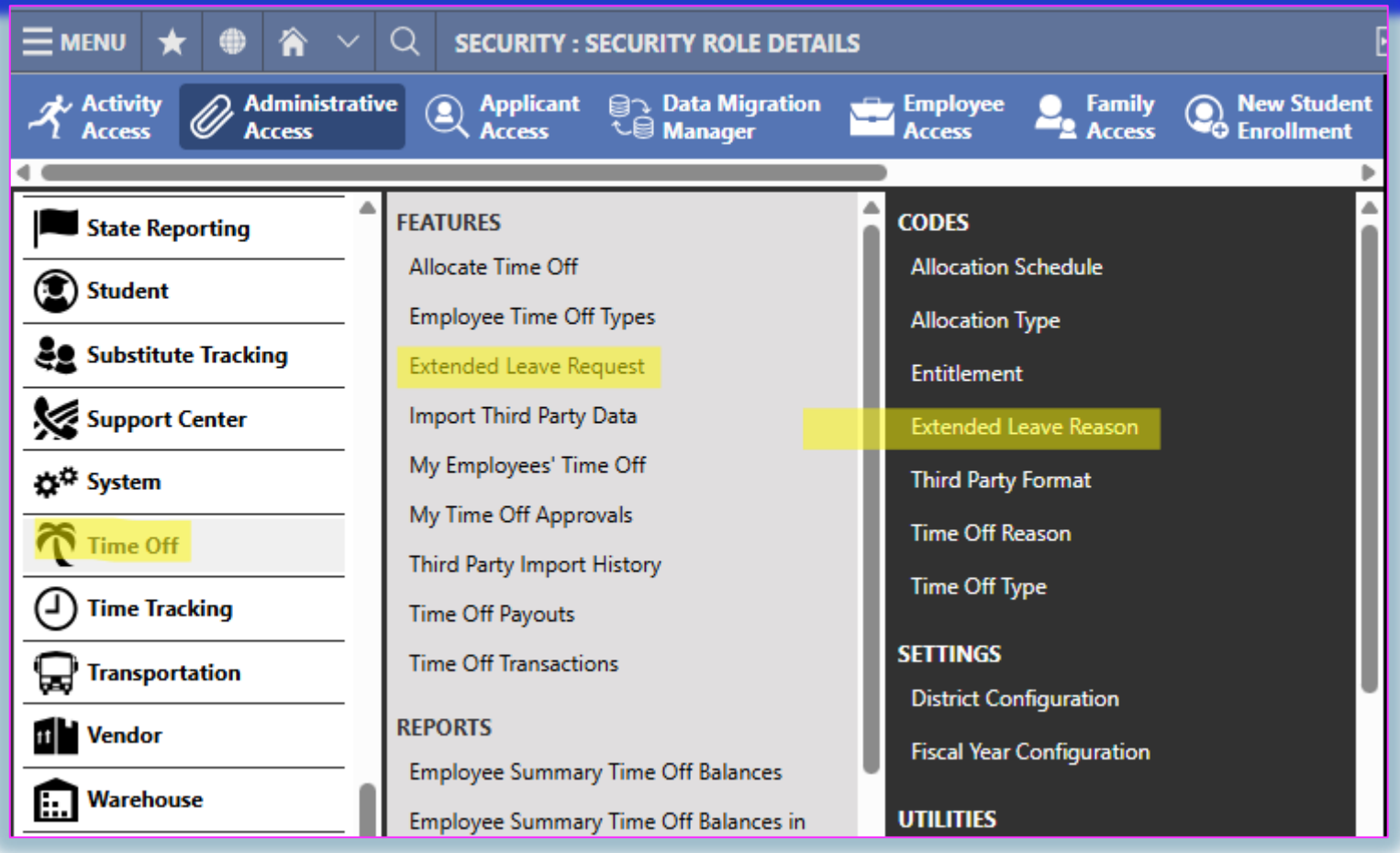
Set Security



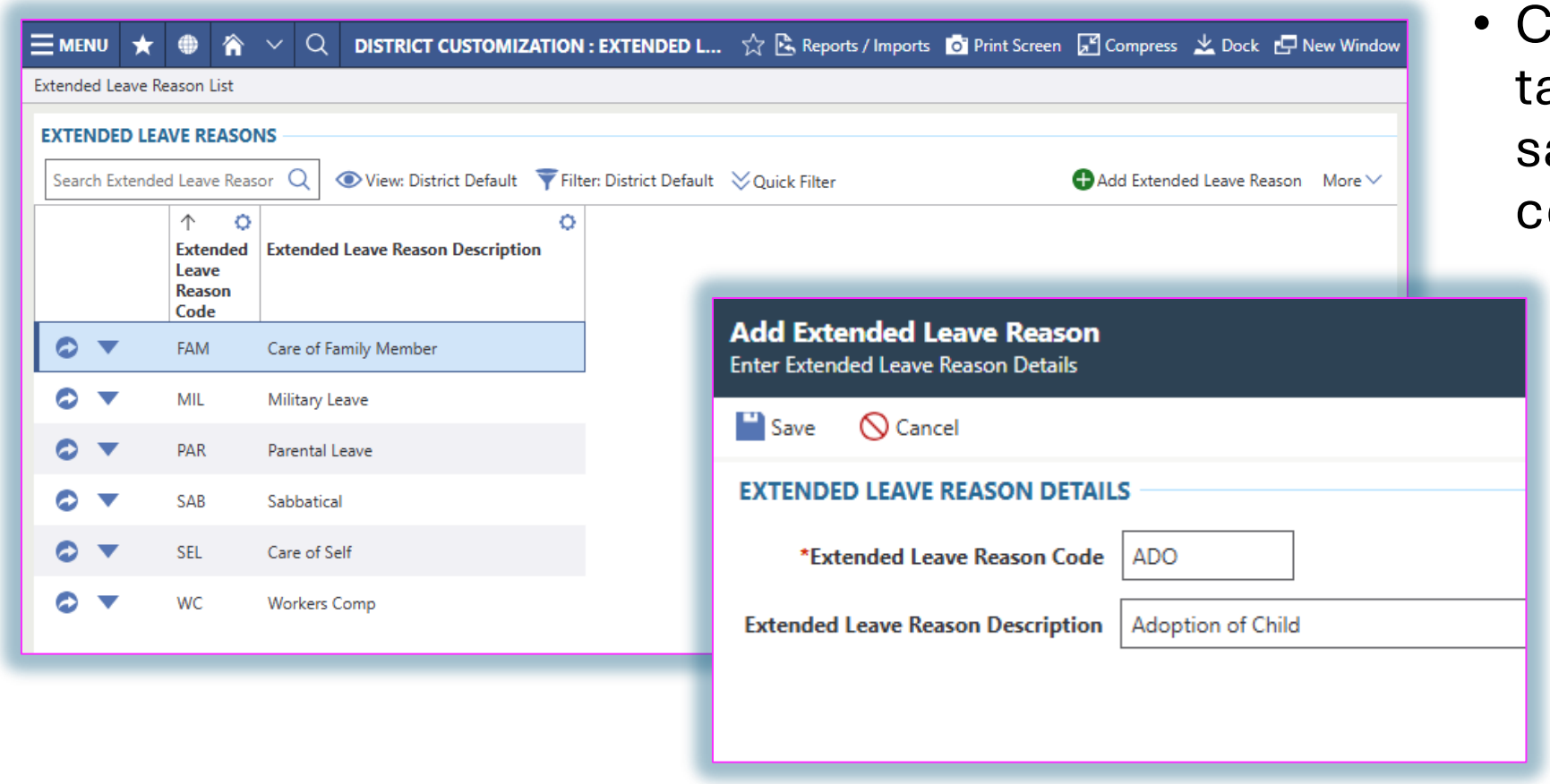
- The new screens are available in menu security.

Features and Codes Screens

- The newly created Features and Codes screens are displayed under the Time Off module.

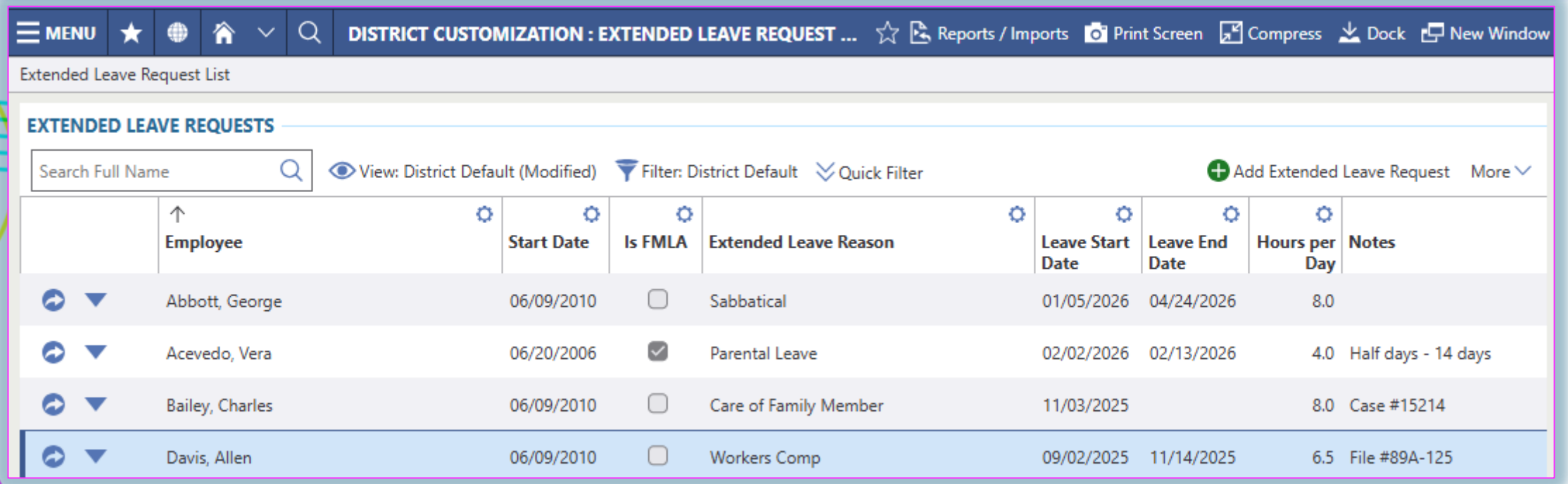


New Code Table



- Custom code tables work the same as system code tables.

Features List Screen

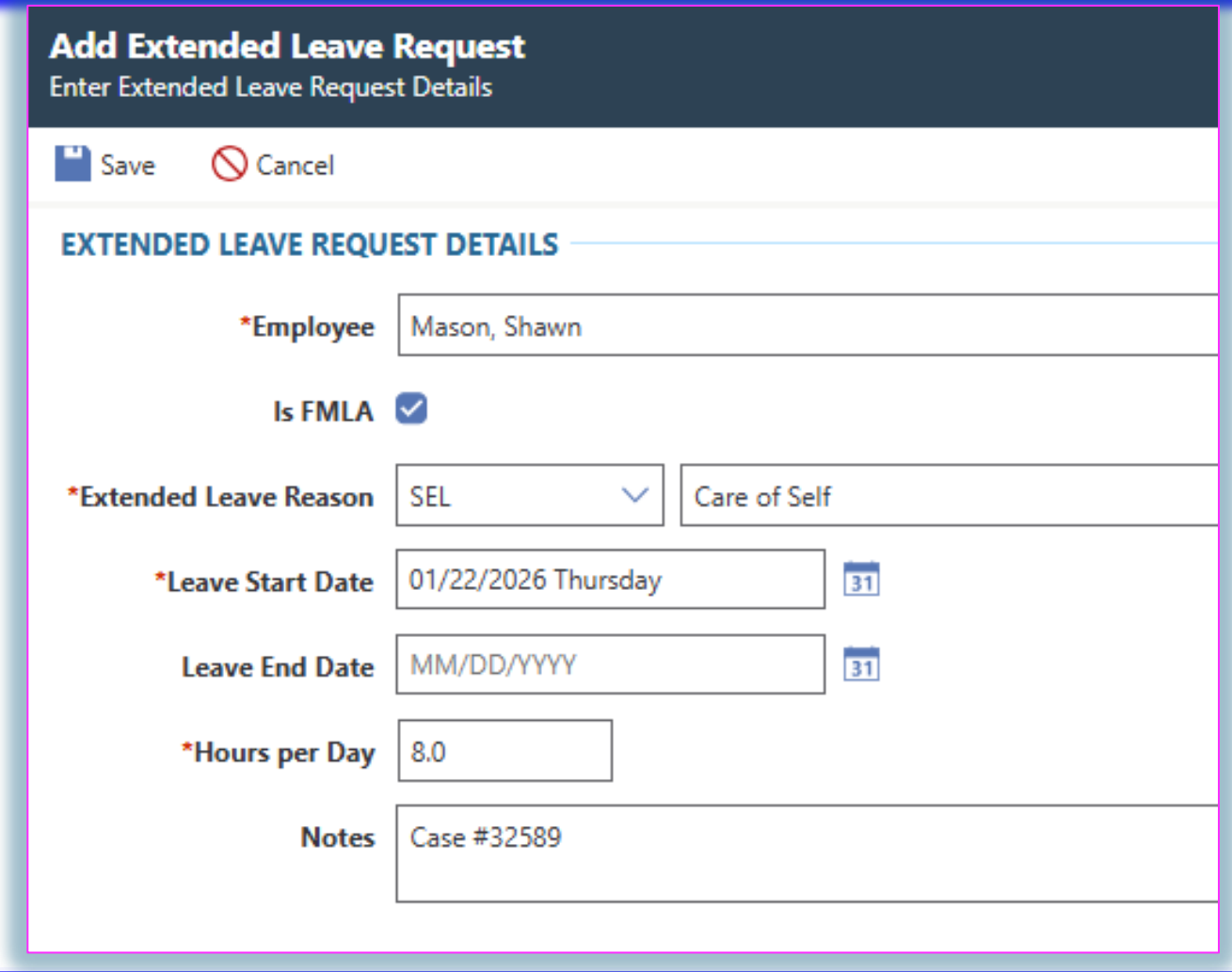


Employee	Start Date	Is FMLA	Extended Leave Reason	Leave Start Date	Leave End Date	Hours per Day	Notes
Abbott, George	06/09/2010	☐	Sabbatical	01/05/2026	04/24/2026	8.0	
Acevedo, Vera	06/20/2006	☑	Parental Leave	02/02/2026	02/13/2026	4.0	Half days - 14 days
Bailey, Charles	06/09/2010	☐	Care of Family Member	11/03/2025		8.0	Case #15214
Davis, Allen	06/09/2010	☐	Workers Comp	09/02/2025	11/14/2025	6.5	File #89A-125

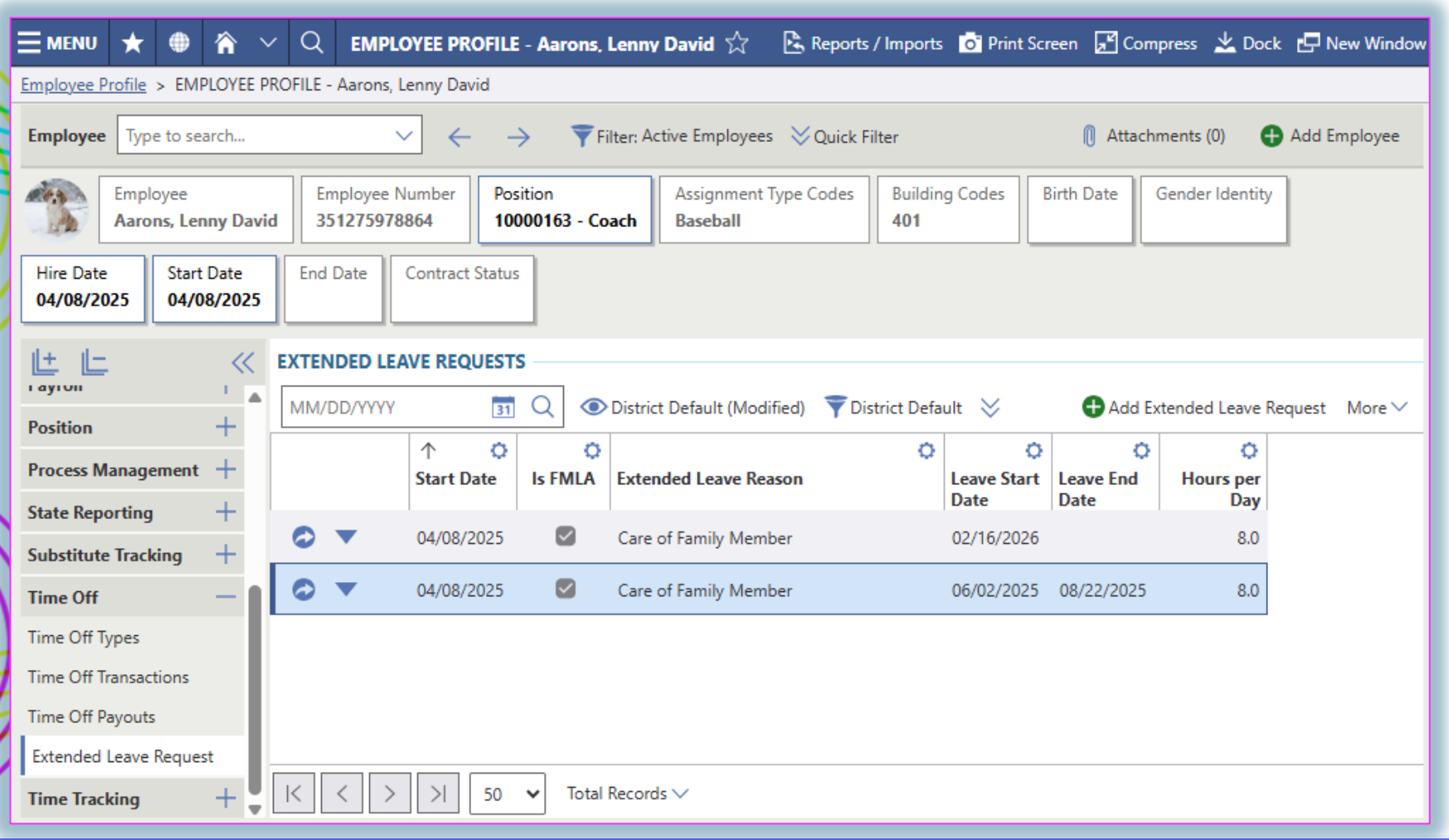
- The Extended Leave Request from the features area shows all employees.

Add from Features

- When adding a record from the features list, you need to select the employee.

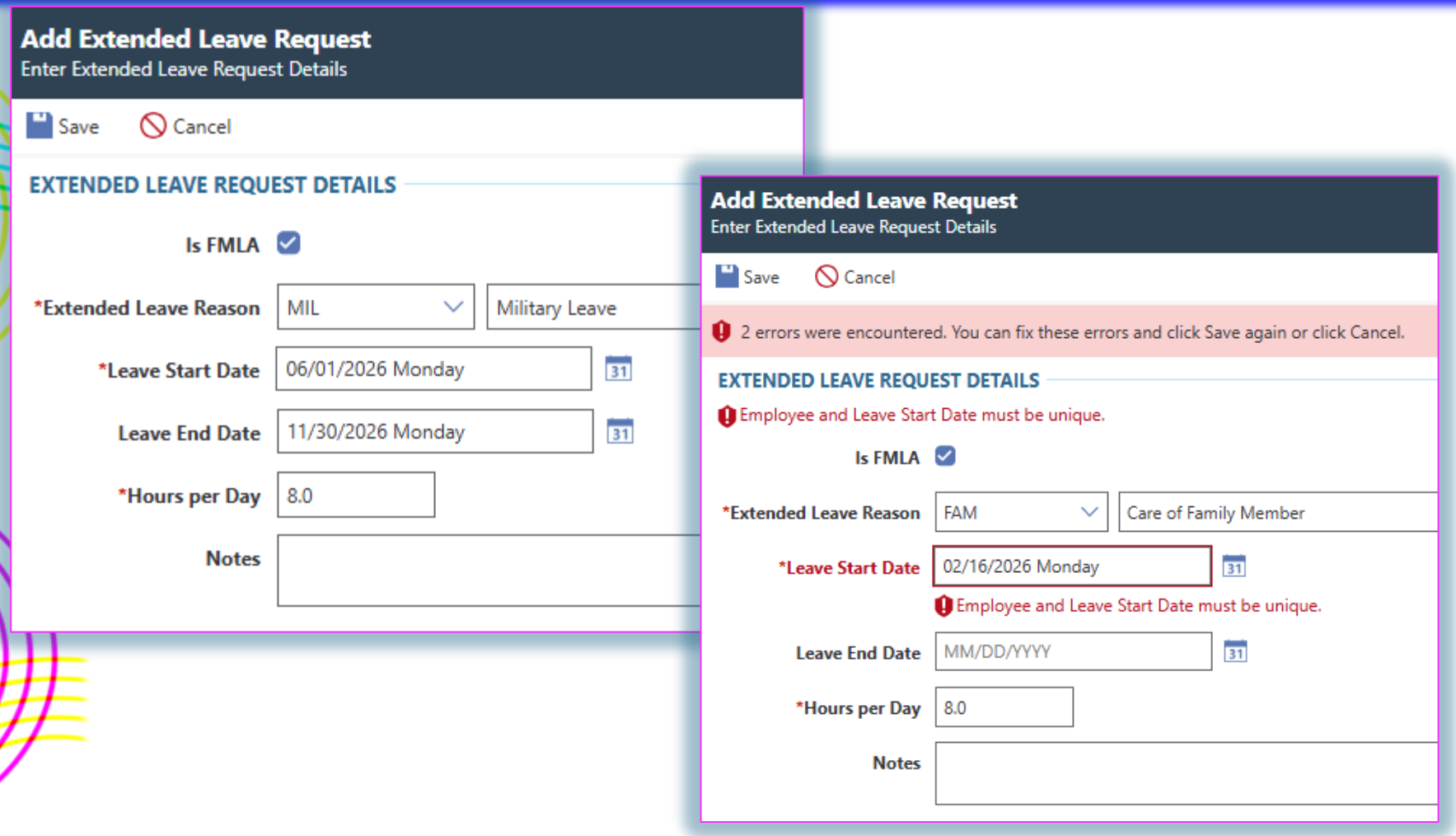


Employee Profile



- Records only show for the selected employee.

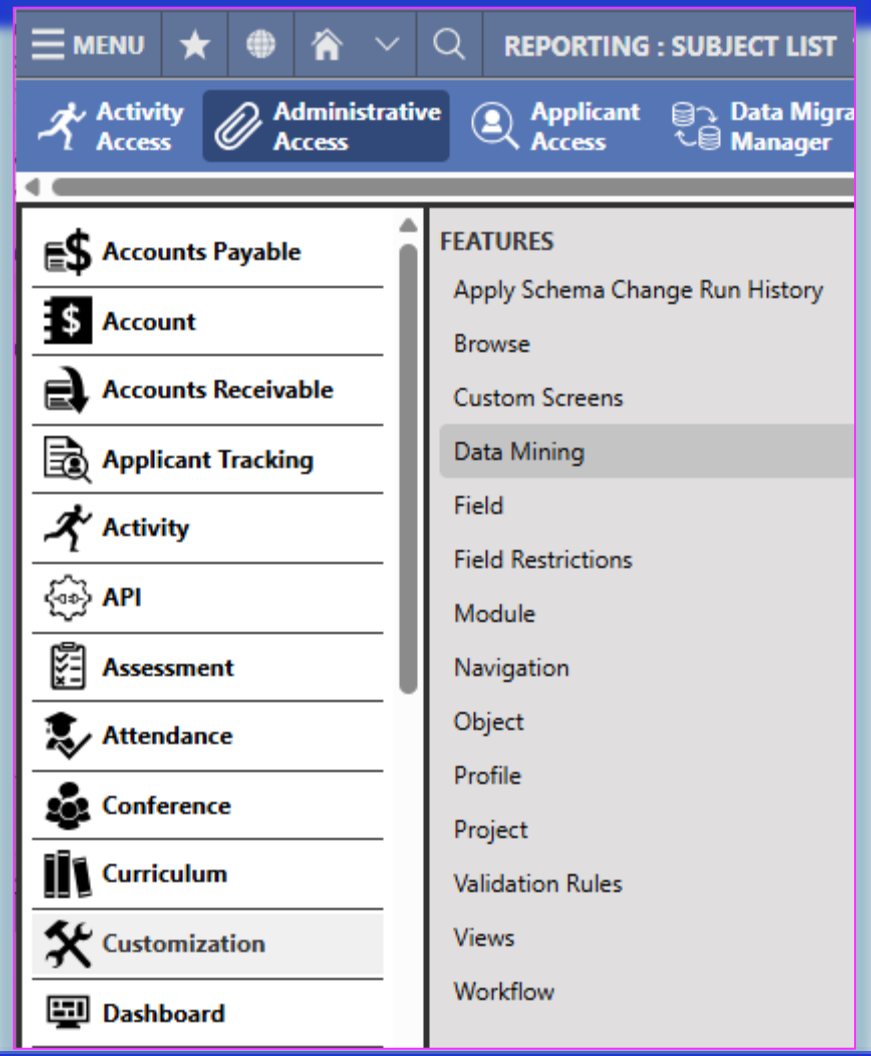
Add from Employee Profile



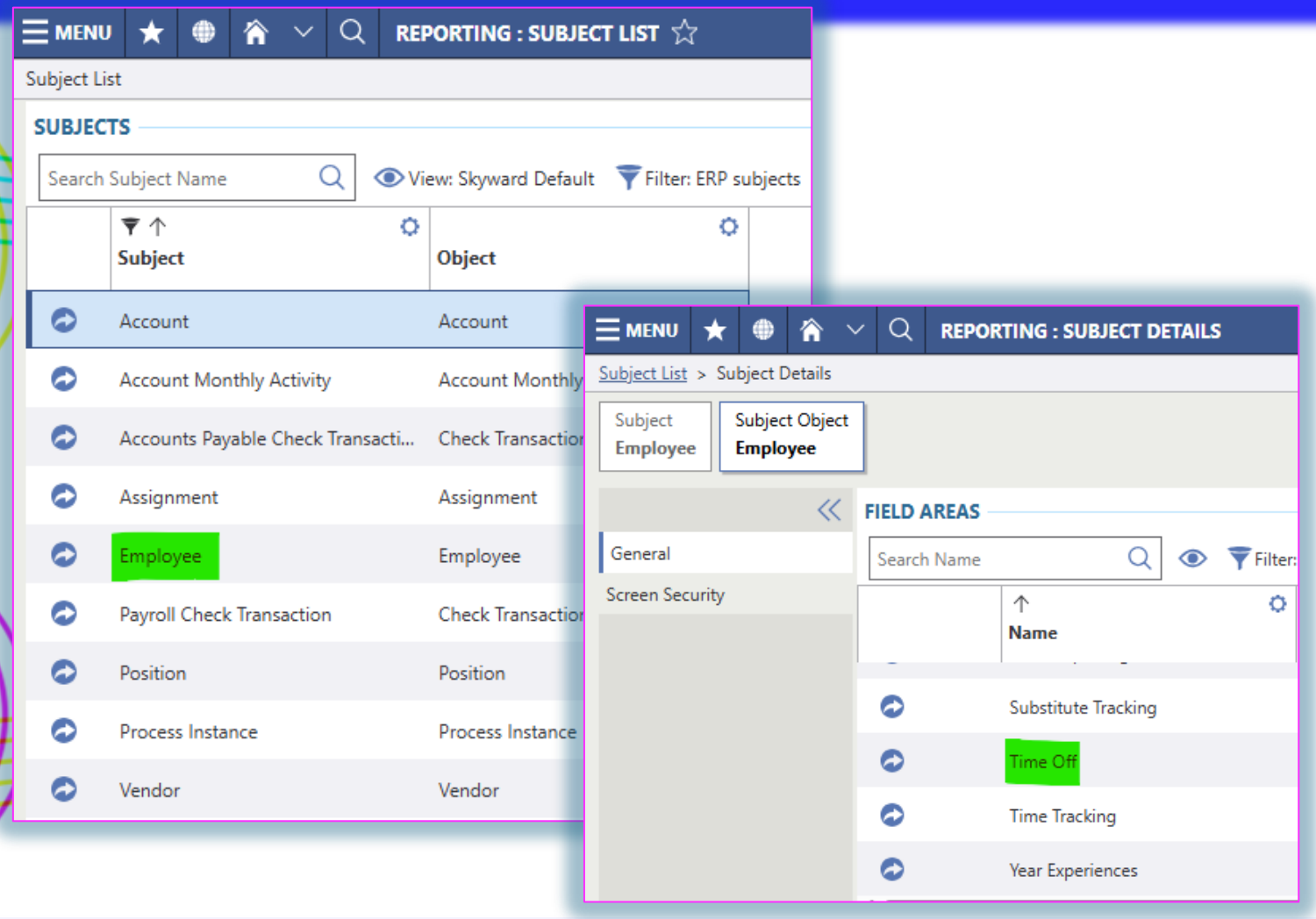
- The process already knows the employee when adding a record from the profile, so no employee selector is present.
- Due to the validation rule we created, an error occurs if you try to enter a record with the same start date for the employee.

Adding Custom Fields to Data Mining

- Fields can be added to Data Mining
  - Navigate to Customization > Data Mining

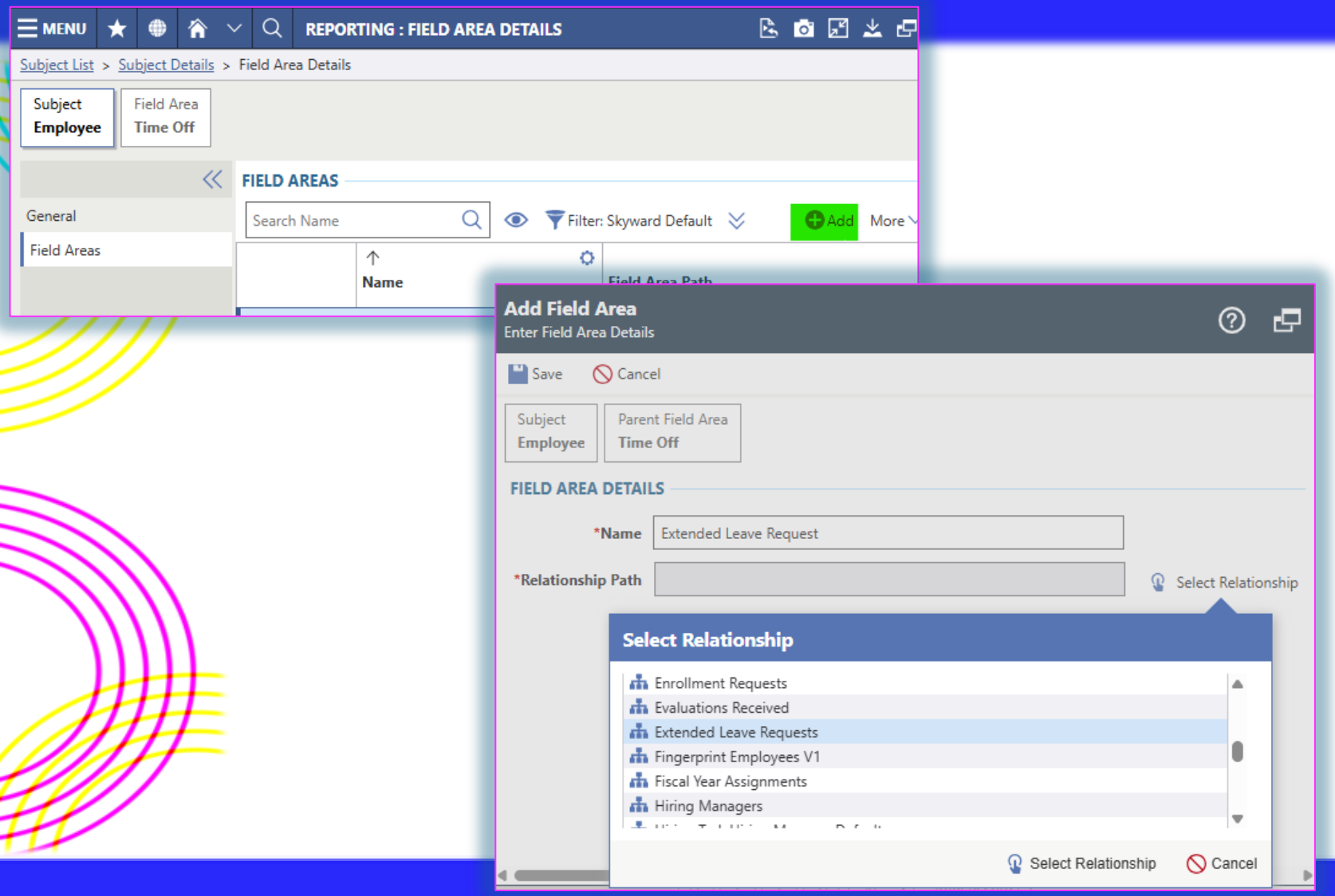


Select the Subject and Field Area



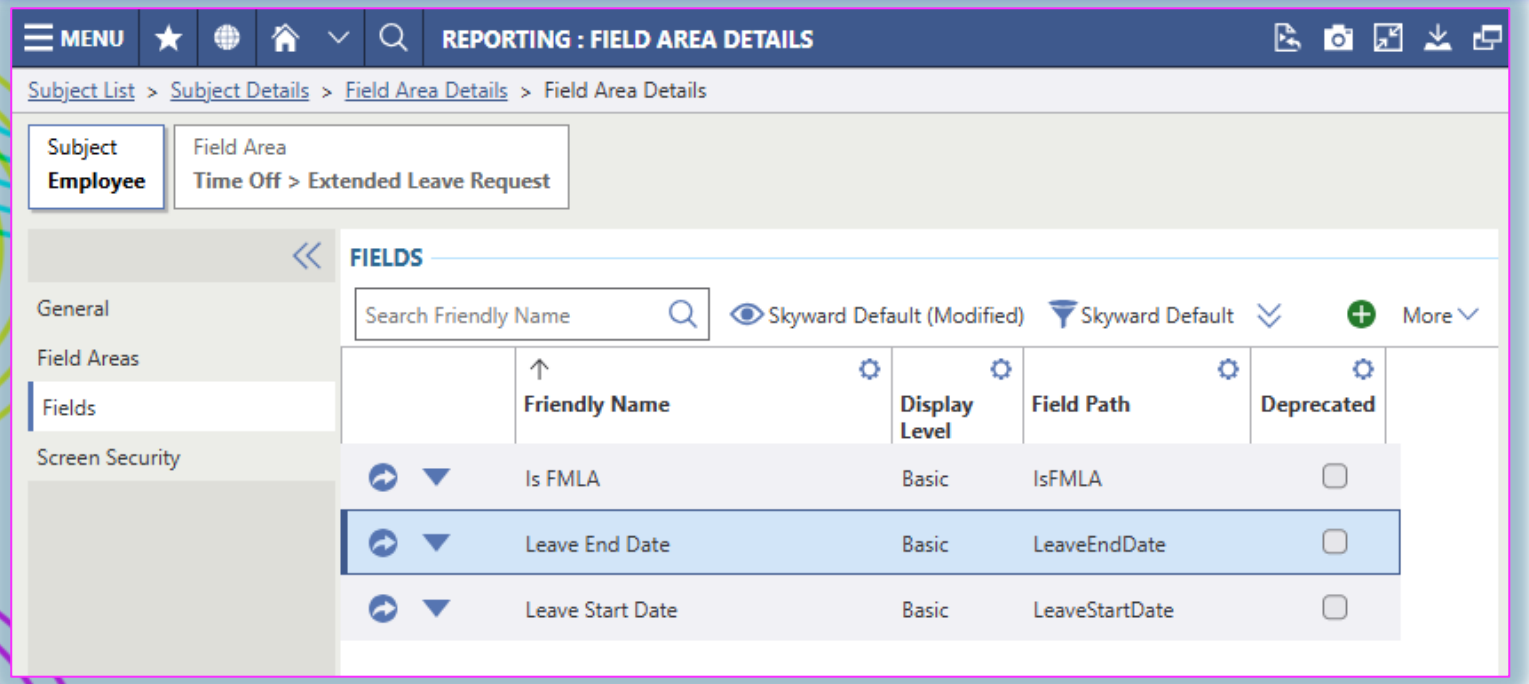
- Extended Leave is related to employees, so we select the Employee subject.
- The data appears in the Time Off module, so select the Time Off field area.

New Secondary Field Area



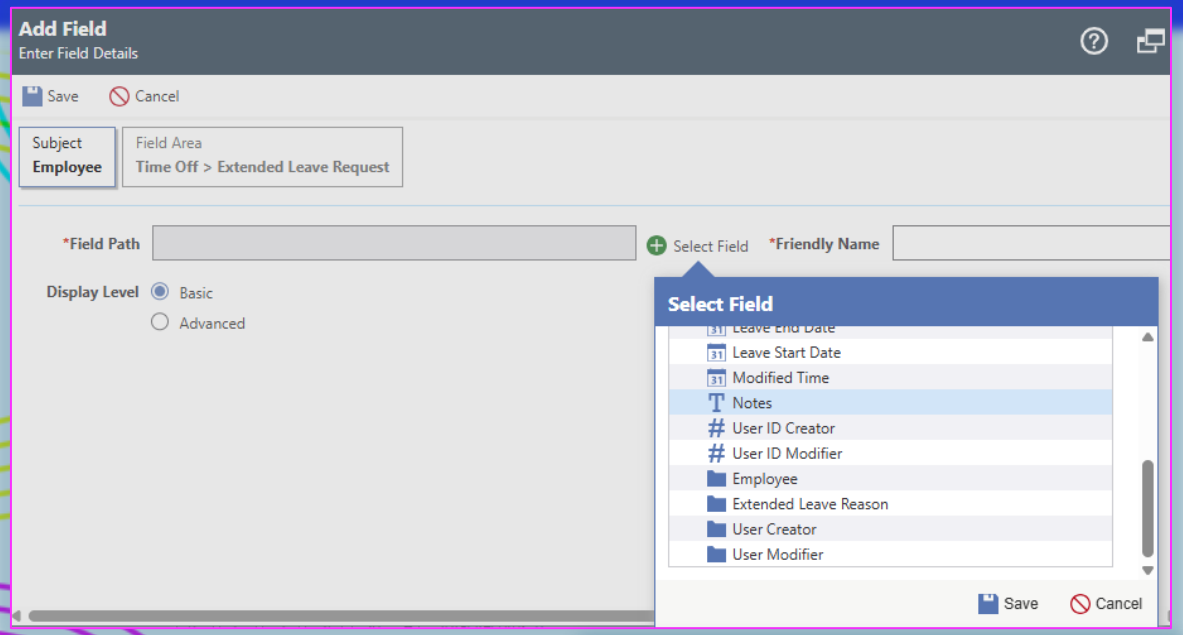
- Add a new Secondary Field Area
- Enter a Name that will become the folder label
- Select the Extended Leave relationship

Secondary Field Area

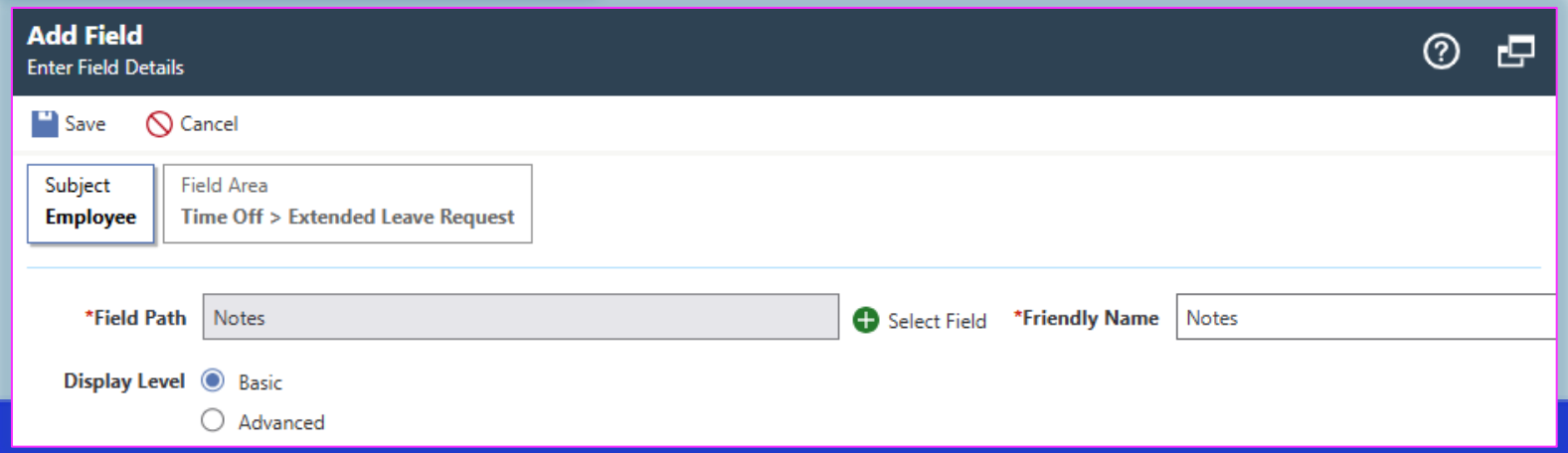


- **Field Areas** is used if there is another level of child records.
- **Fields** are the fields from this object that will be available in Data Mining.
- **Screen Security** is the list of screens that grant access to these fields in Data Mining.

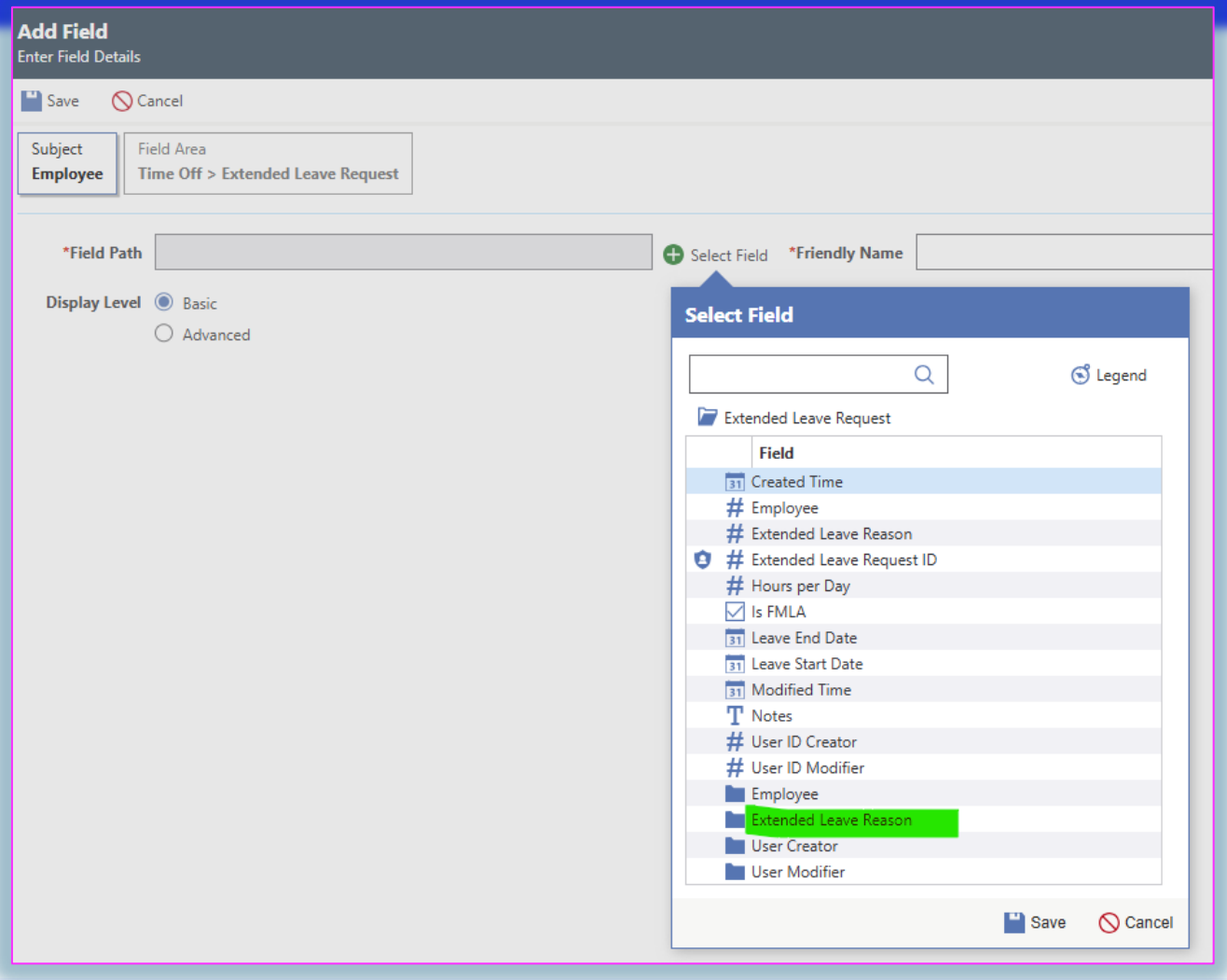
Adding Fields



- Select the field from the tree browse
- Enter a friendly name to display in Data Mining
- Determine if this is a basic (used often) or advanced (infrequent) field



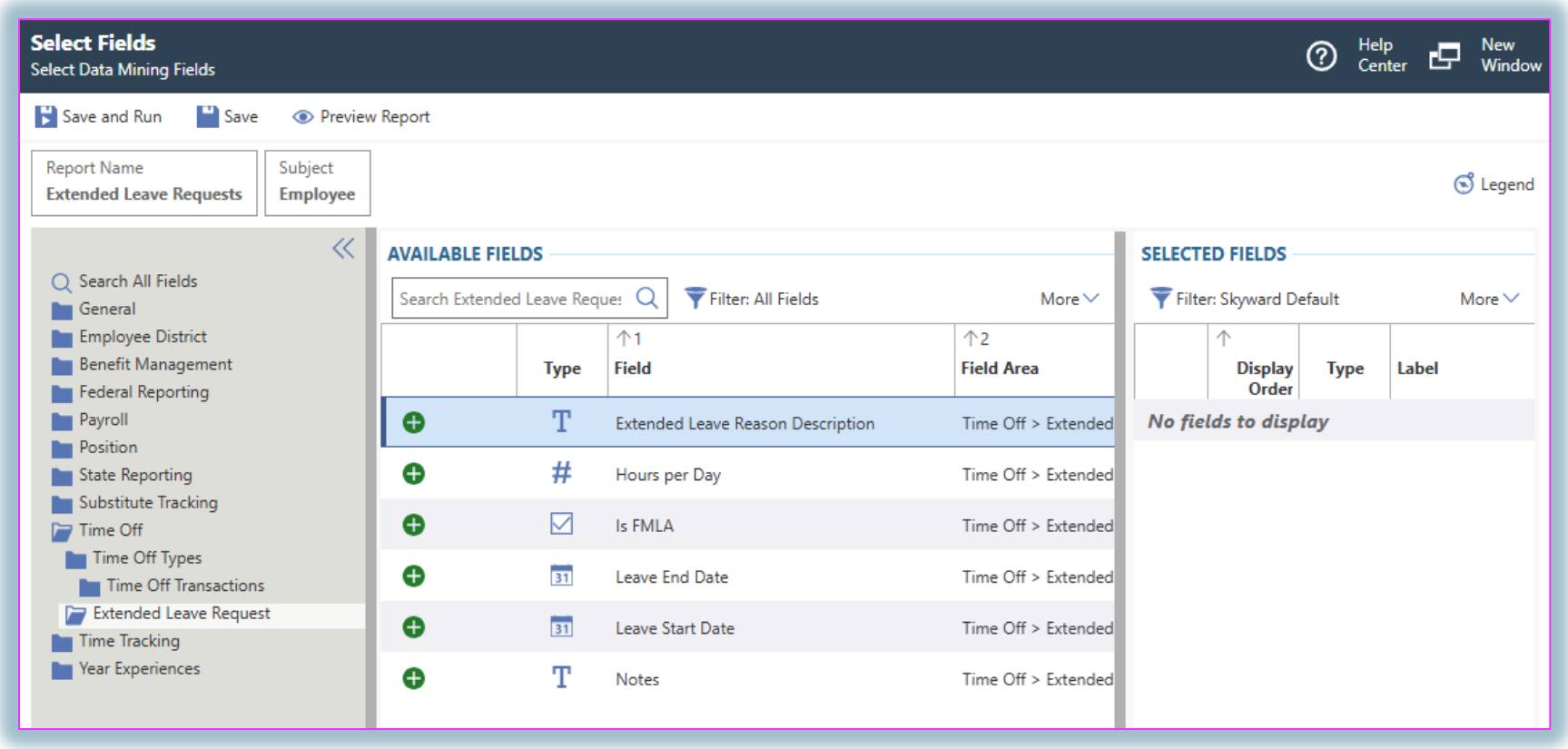
Adding Code Fields



- Adding Code Fields requires you to navigate into the code folder to find the fields for code and description.

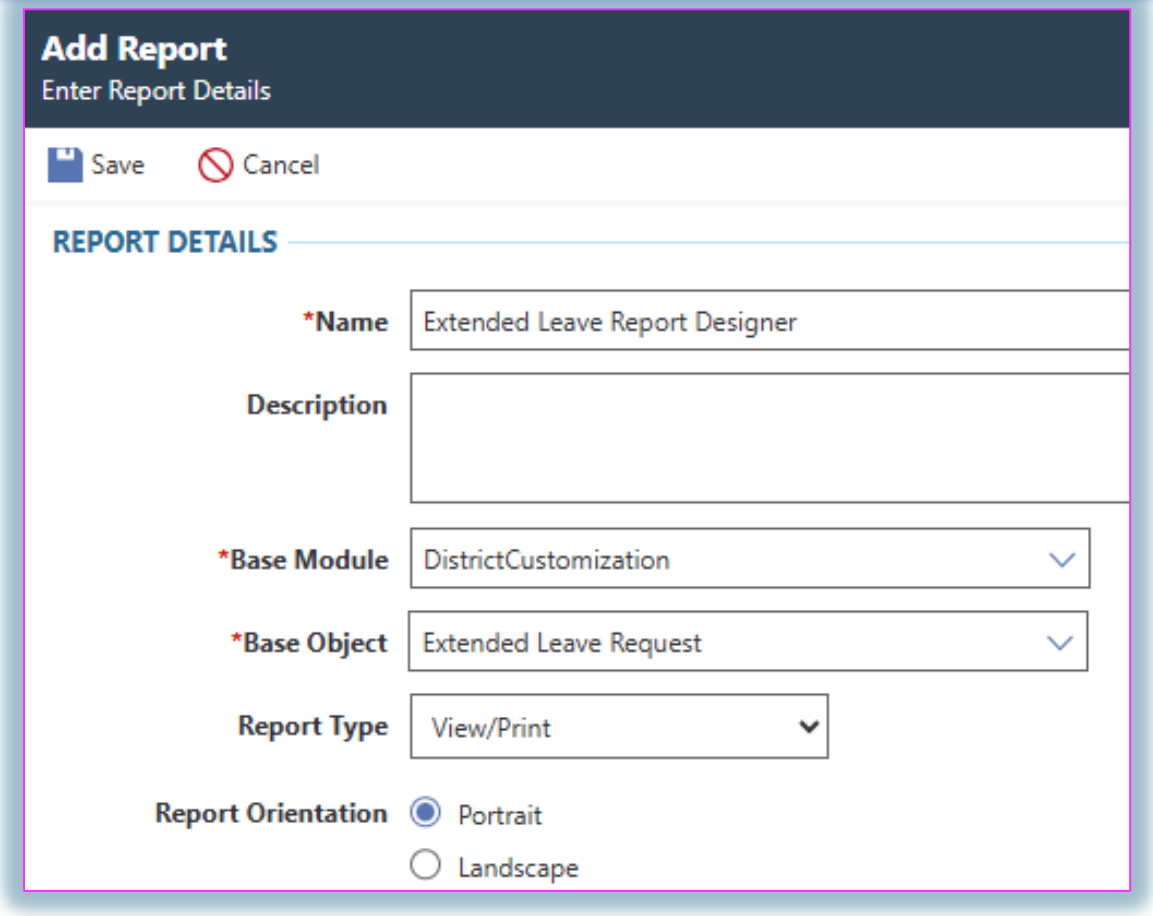
Data Mining

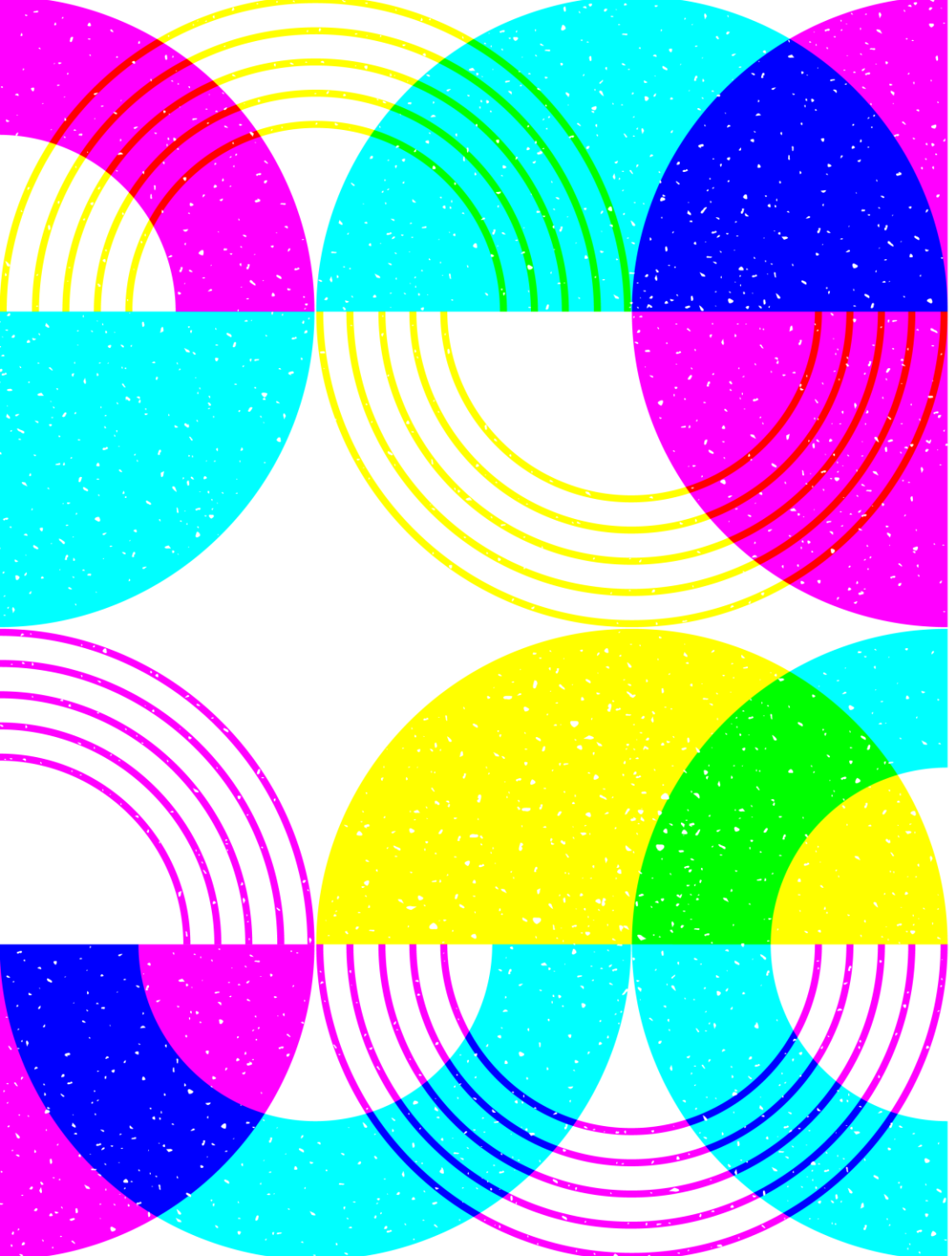
- Navigate through the Data Mining folders using the same path you use to get to the field in Employee Profile.



Report Designer

- In Report Designer, the custom fields are found in the DistrictCustomization module.





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thank you!