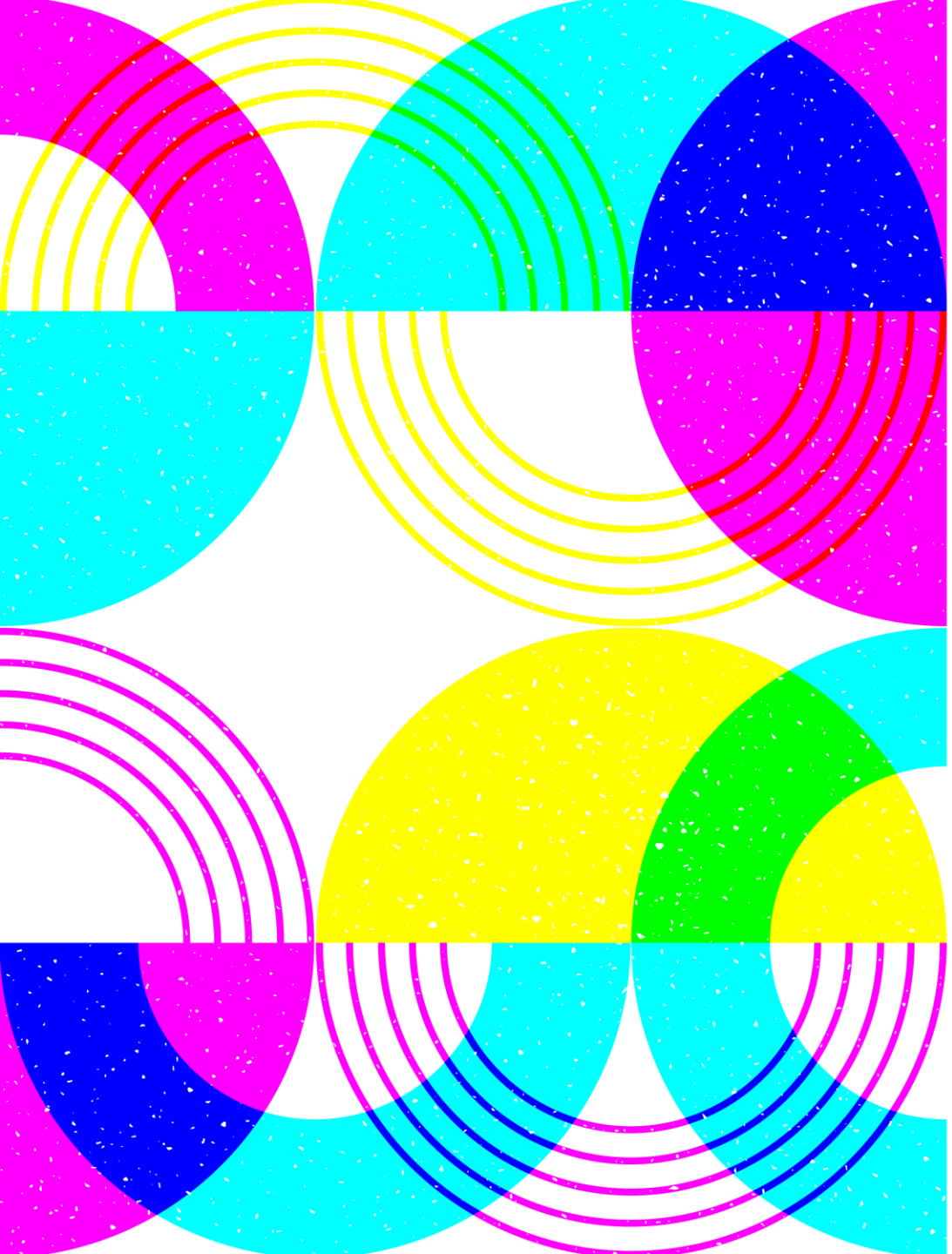


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Designing Your SIS: Customizing Qmlativ for What Matters Most

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?

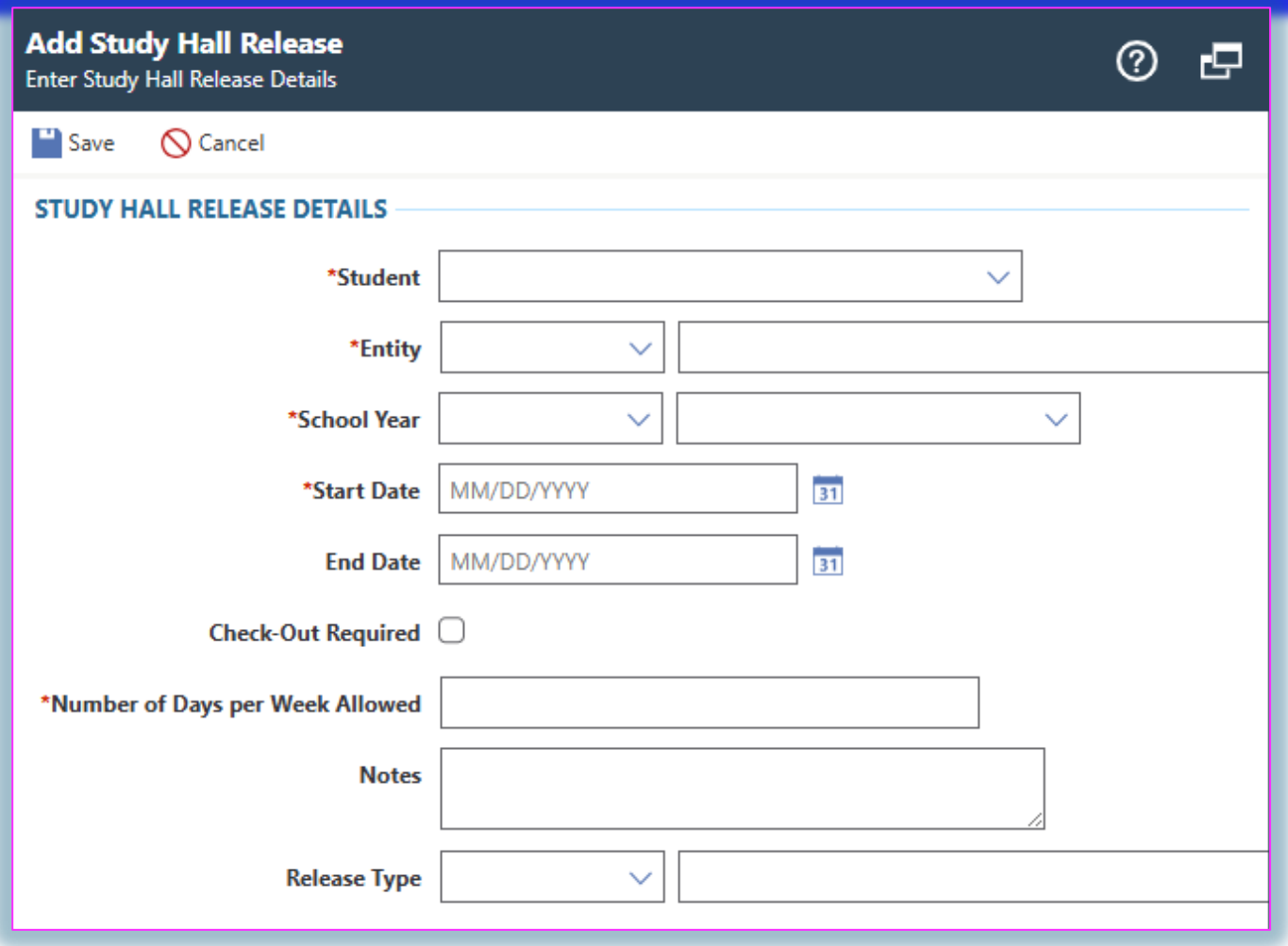
- Allows districts to create their own fields, objects, and screens when the system doesn't already provide what they need.

- 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 Student Profile, will a student have one of these records or many?
5. Does the student have a record for each school year?
6. Does the student have a record for each entity that he/she is enrolled in?

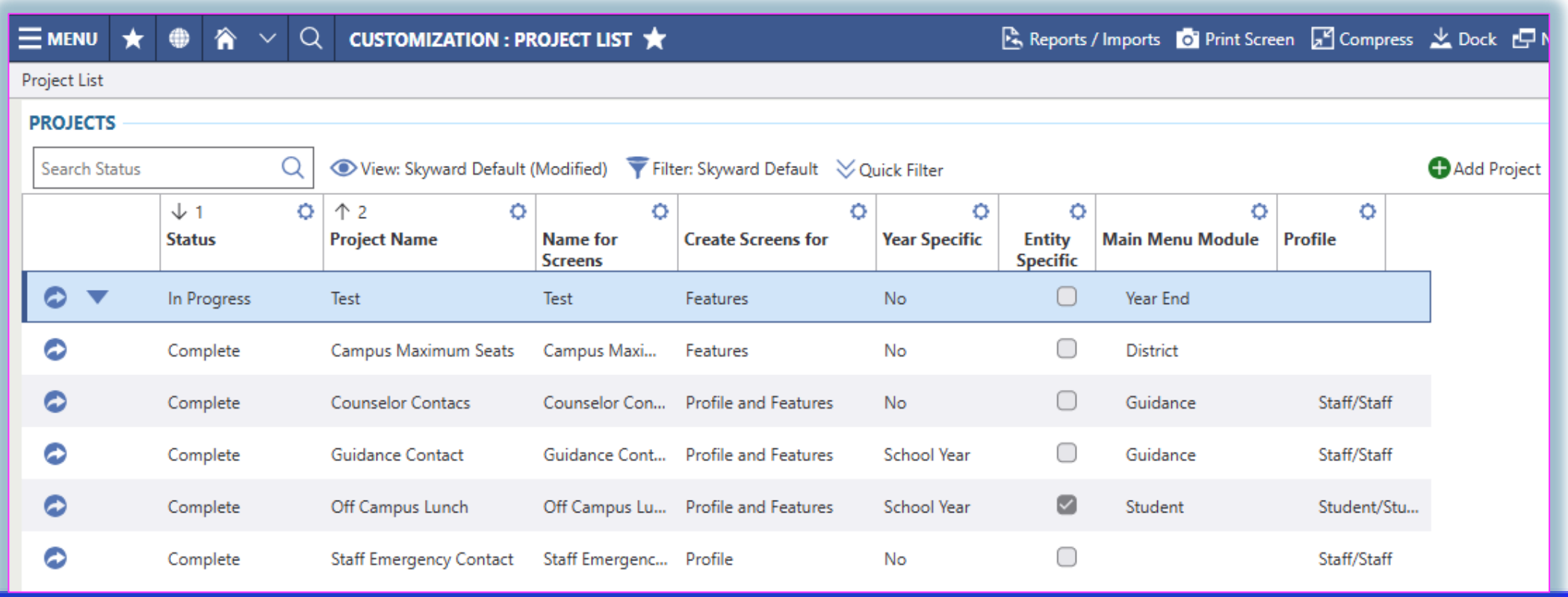
Example – Study Hall Release



1. Screen lives on Student Profile and Feature list.
2. Fields:
   - Grade Level,
   - Start/End dates,
   - Release Type,
   - Check-Out Required,
   - Number of Days per Week Allowed, and
   - Notes.
3. Release Type will be a Code List.
4. Students can have many of these.
5. Records are per school year.
6. Records are per entity.

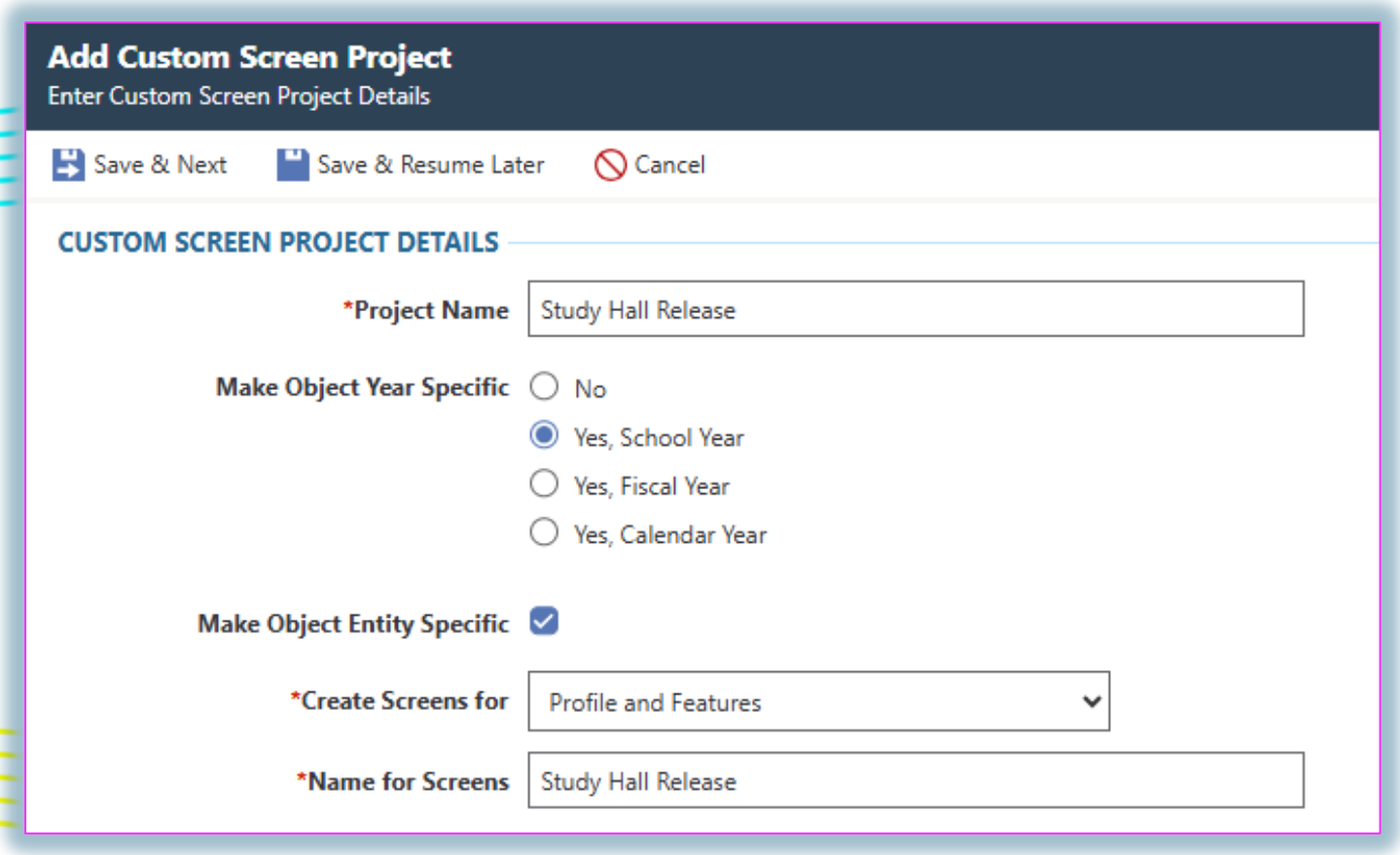
Customization Project

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



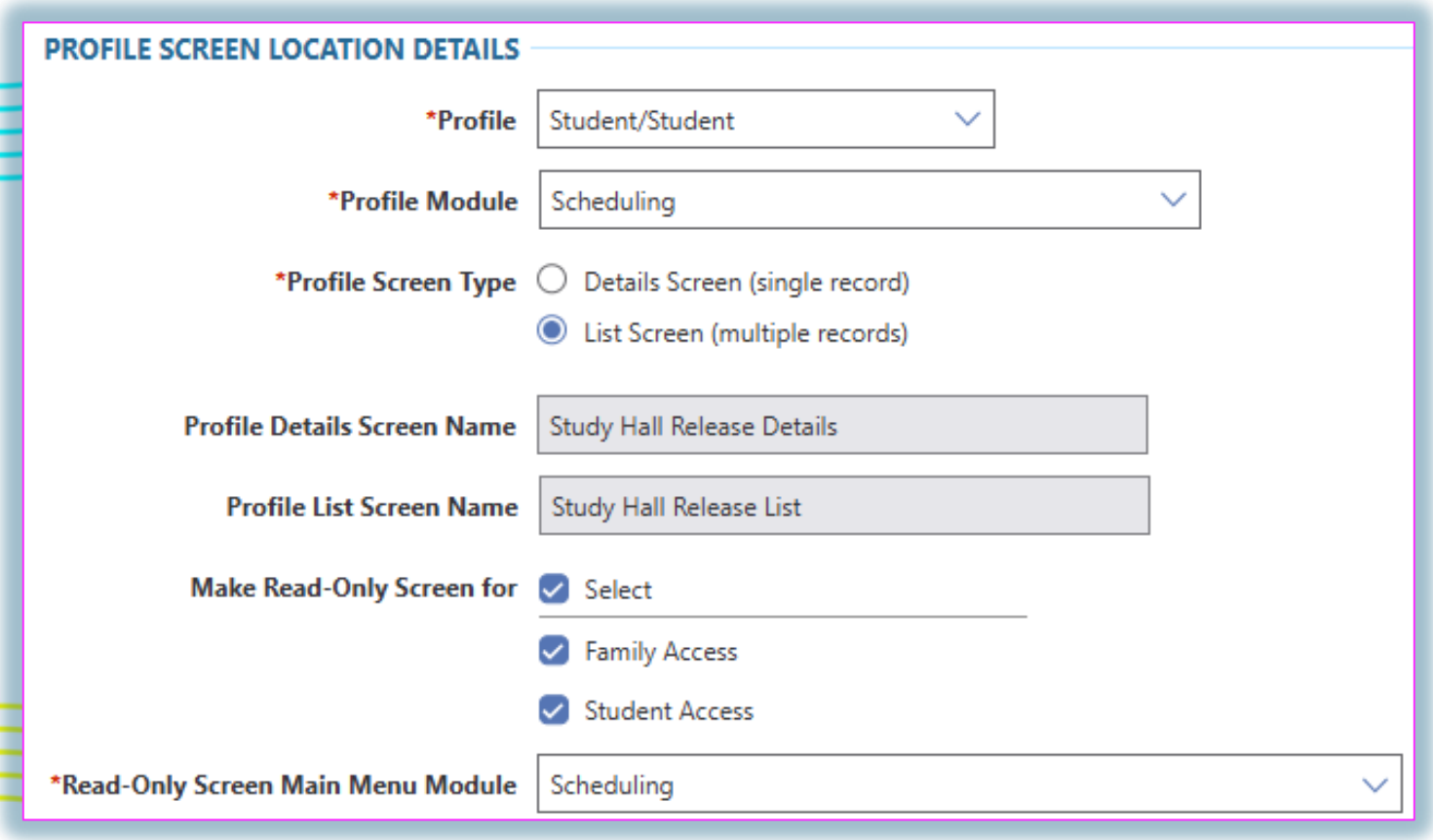
	1 Status	2 Project Name	Name for Screens	Create Screens for	Year Specific	Entity Specific	Main Menu Module	Profile
	In Progress	Test	Test	Features	No	☐	Year End	
	Complete	Campus Maximum Seats	Campus Maxi...	Features	No	☐	District	
	Complete	Counselor Contacs	Counselor Con...	Profile and Features	No	☐	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

Project – Custom Screen Details



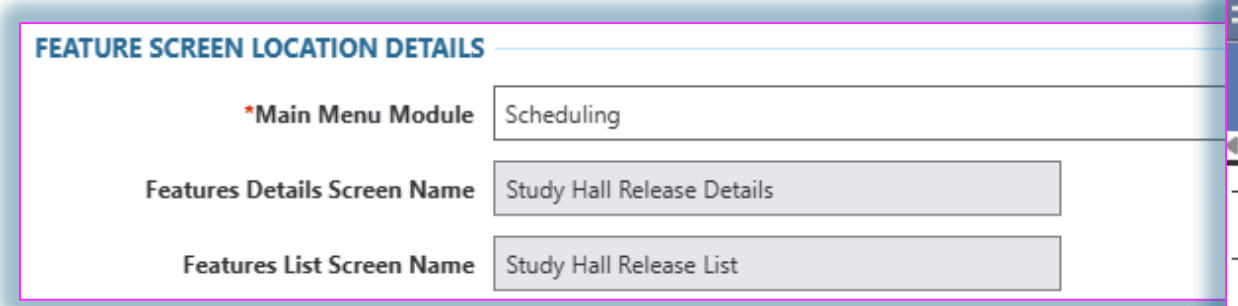
- Select School Year to have the record be year specific.
- Check Entity Specific if the record applies to a certain entity.
- Screens can be Profile only, Feature only or both.

Project – Profile Screen Details



- Profile Module – select an existing module or create a new one.
- Students could have permissions changed during the school year, so we will allow multiple records per student (list screen).
- Choose if you want the screen to show in Family and/or Student Access.

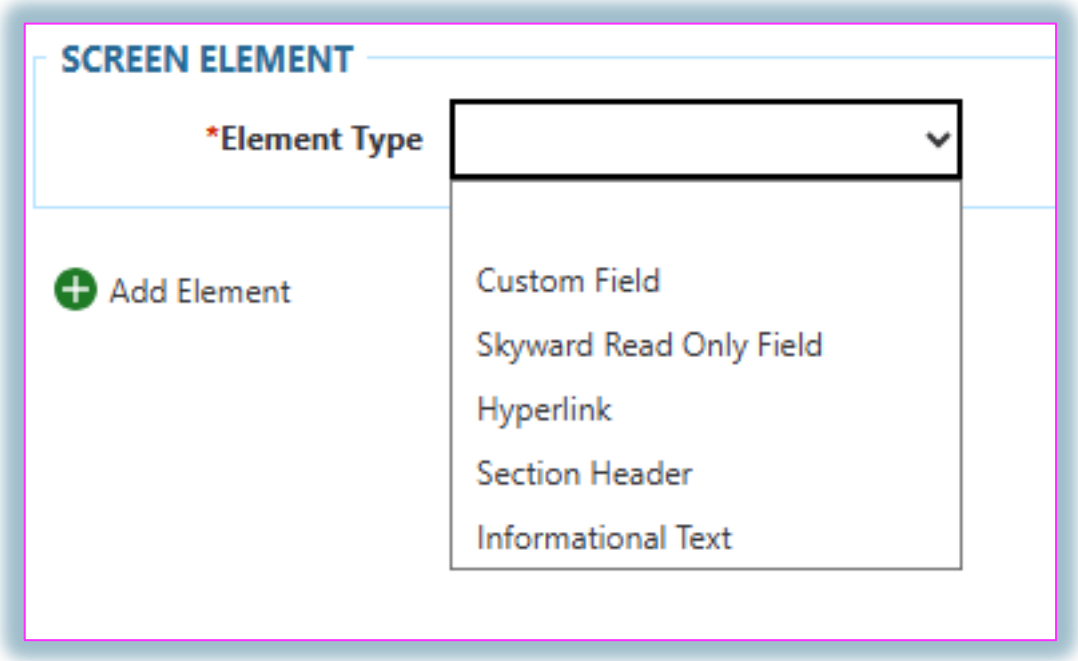
Project – Feature Screen Details



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



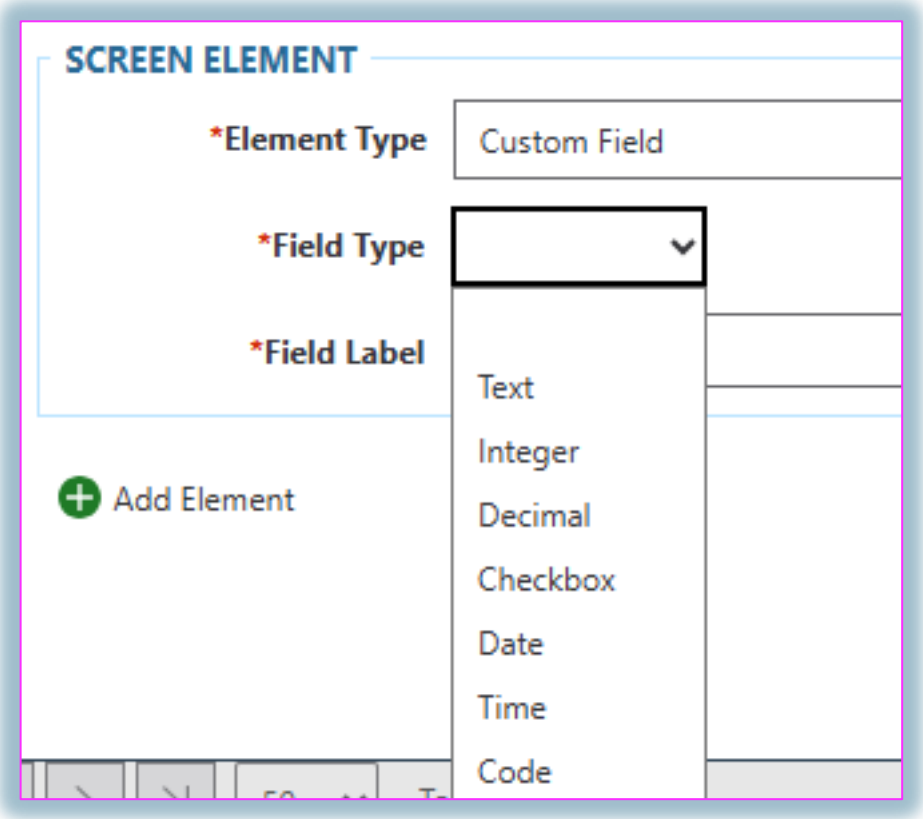
Add Elements



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

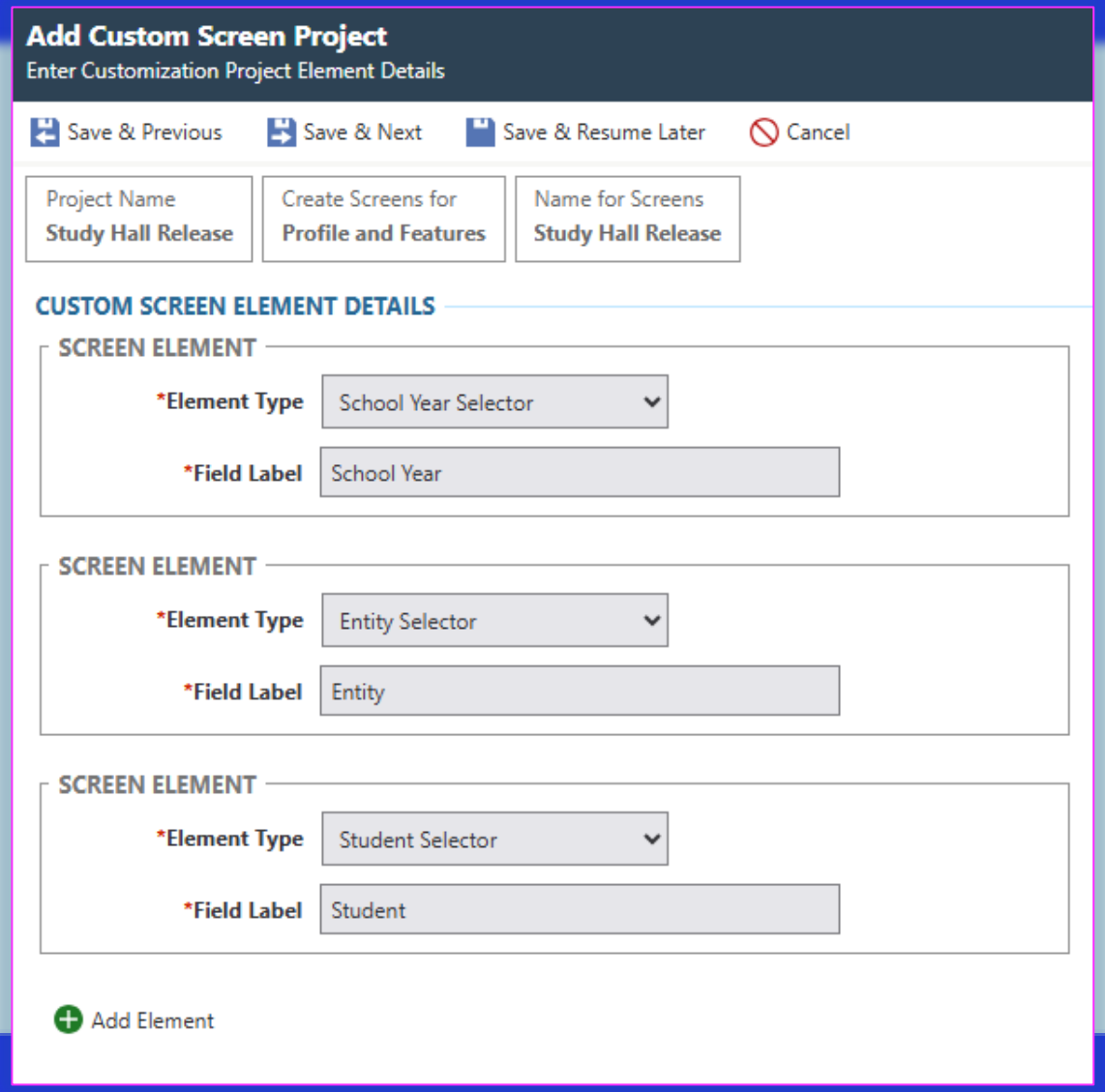
- **Custom Field** creates a new field in an object (table).
  - Can be accessed in Report Designer.
- **Skyward Read Only Field** adds an existing Skyward field, but the value cannot be changed on this screen.
- **Hyperlink** links to the URL specified.
- **Section Header** creates separation for grouping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

Project – Custom Field Types



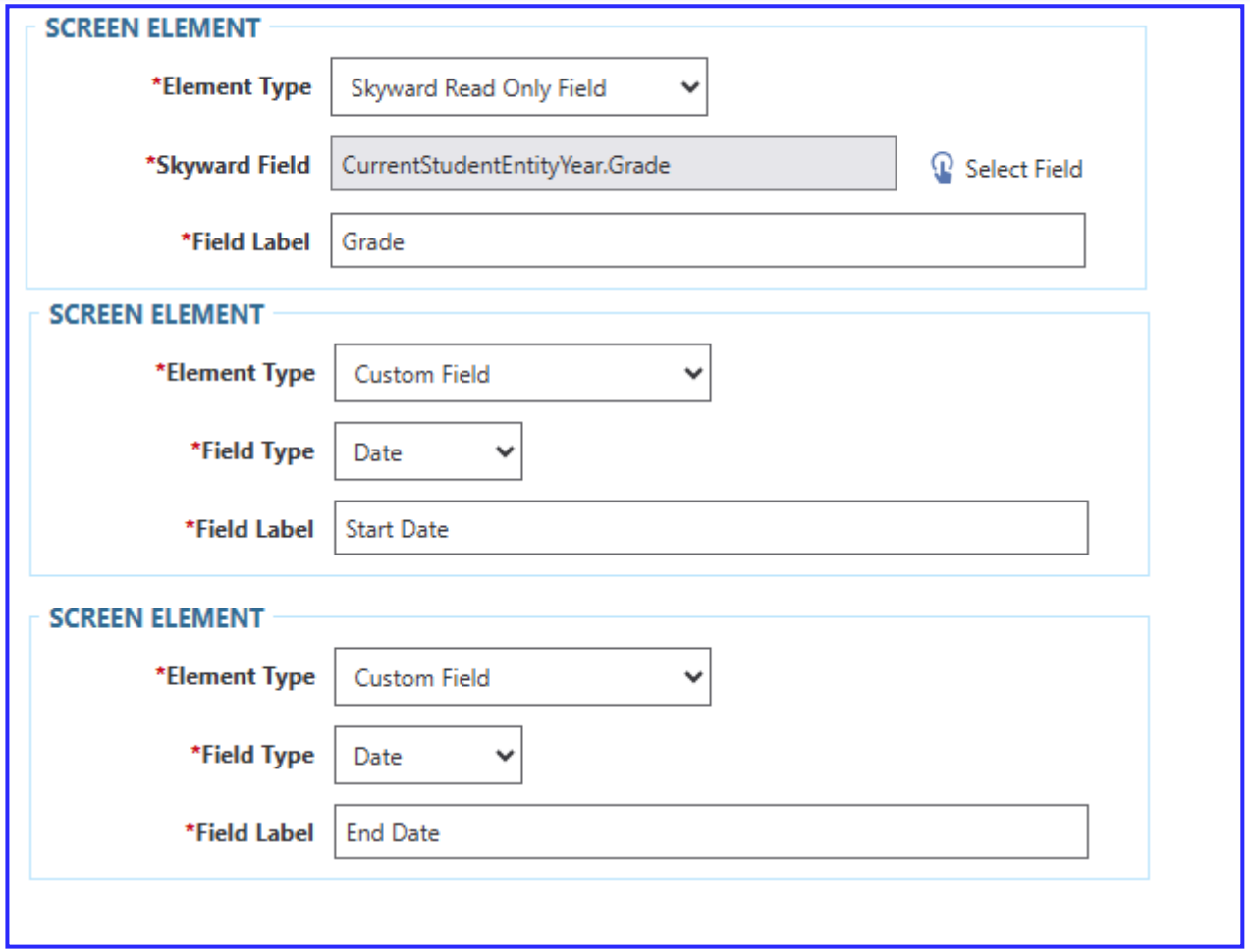
- There are 7 types of custom fields.
- Each type has different options for display and validation specific to that type of field.

Creating Elements



- The workflow automatically added Student, School Year and Entity as fields based on the selections made in the detail setup.
- **Add Element** to add additional fields.

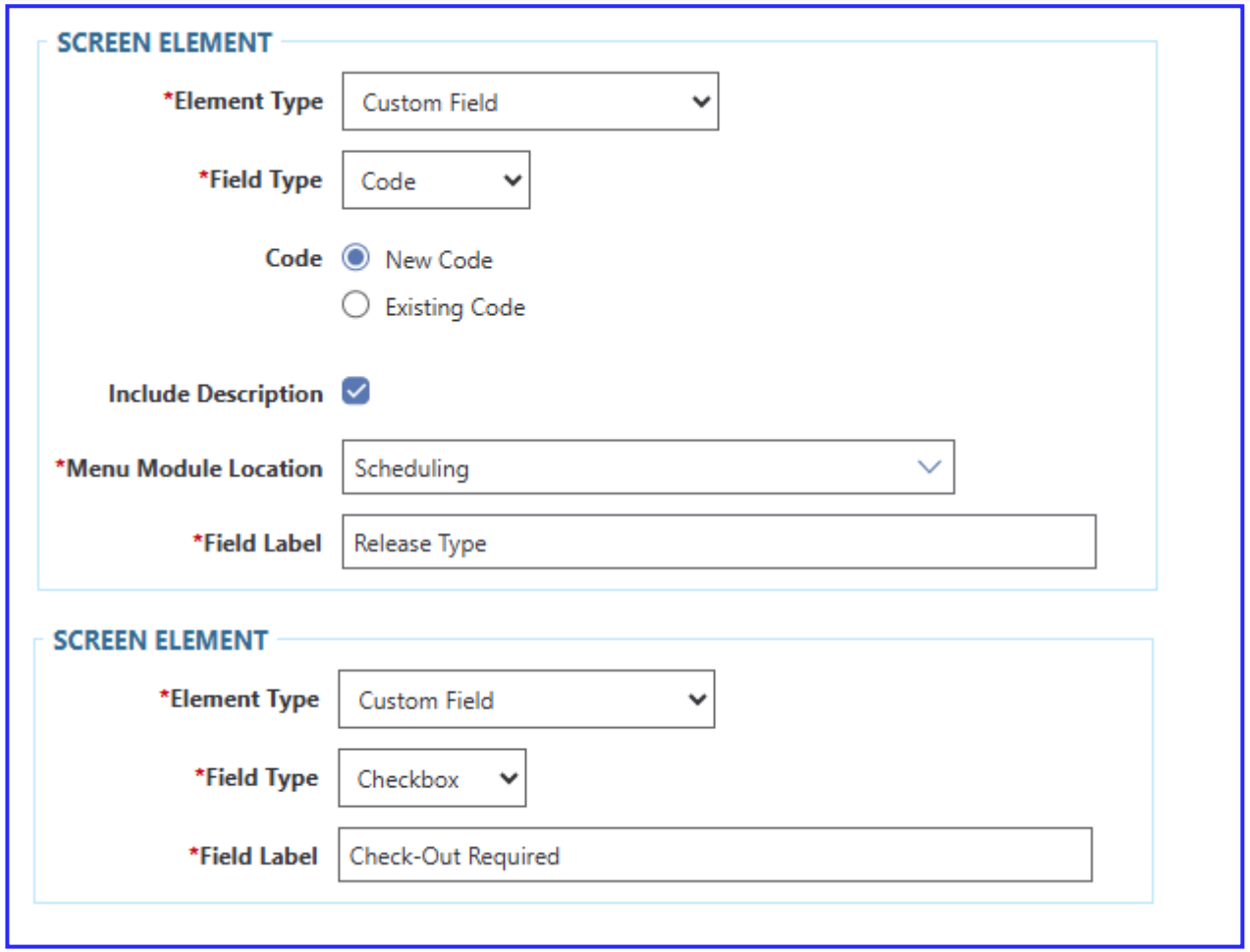
Project – Adding Elements



Fields:

- Grade Level,
- Start/End dates,
- Release Type,
- Check-Out Required,
- Number of Days per Week Allowed, and
- Notes.

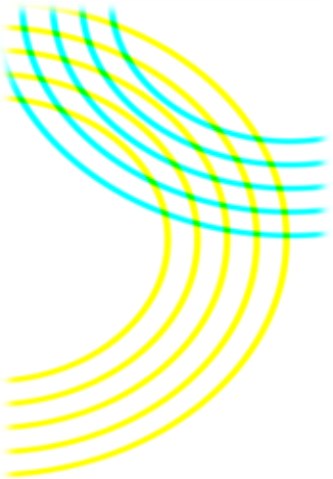
Project – Adding Elements



Fields:

- Grade Level,
- Start/End dates,
- Release Type,
- Check-Out Required,
- Number of Days per Week Allowed, and
- Notes.

Project – Adding Elements





SCREEN ELEMENT

*Element Type: Custom Field

*Field Type: Integer

*Field Label: Number of Days per Week Allowed

SCREEN ELEMENT

*Element Type: Custom Field

*Field Type: Text

*Field Label: Notes

SCREEN ELEMENT

*Element Type: Hyperlink

*Link: http://www.StudyHallReleasePolicy.edu

*Link Text: District Study Hall Release Policy document

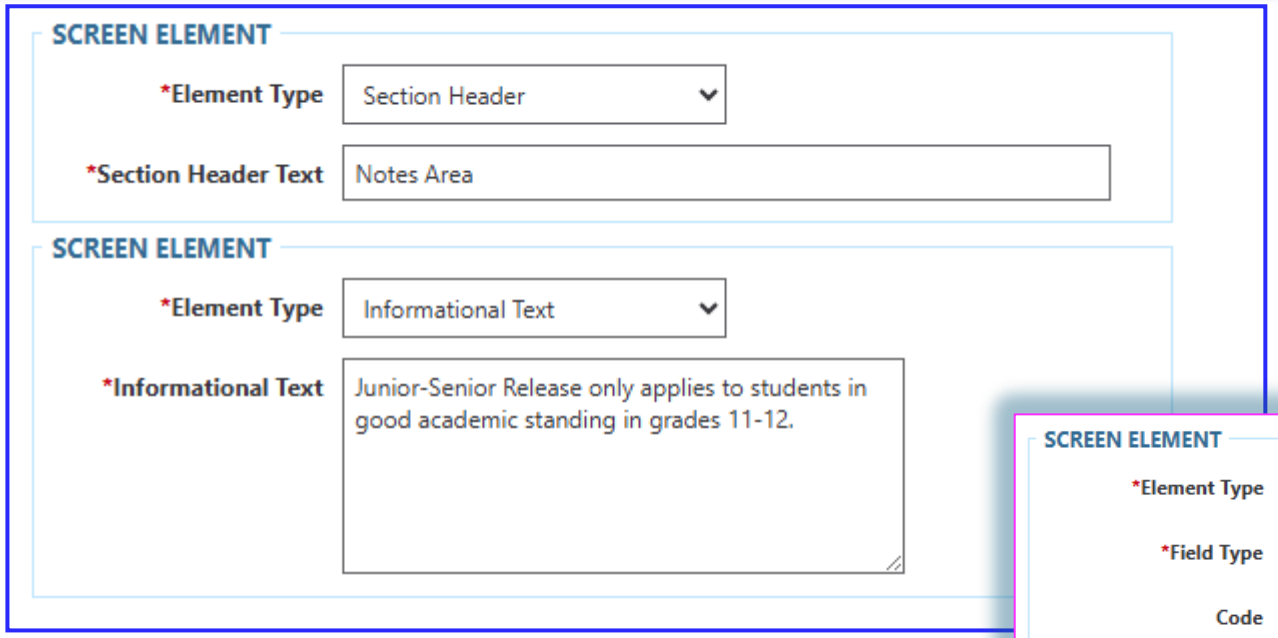
Fields:

- Grade Level,
- Start/End dates,
- Release Type,
- Check-Out Required,
- Number of Days per Week Allowed, and
- Notes.

Additional elements:

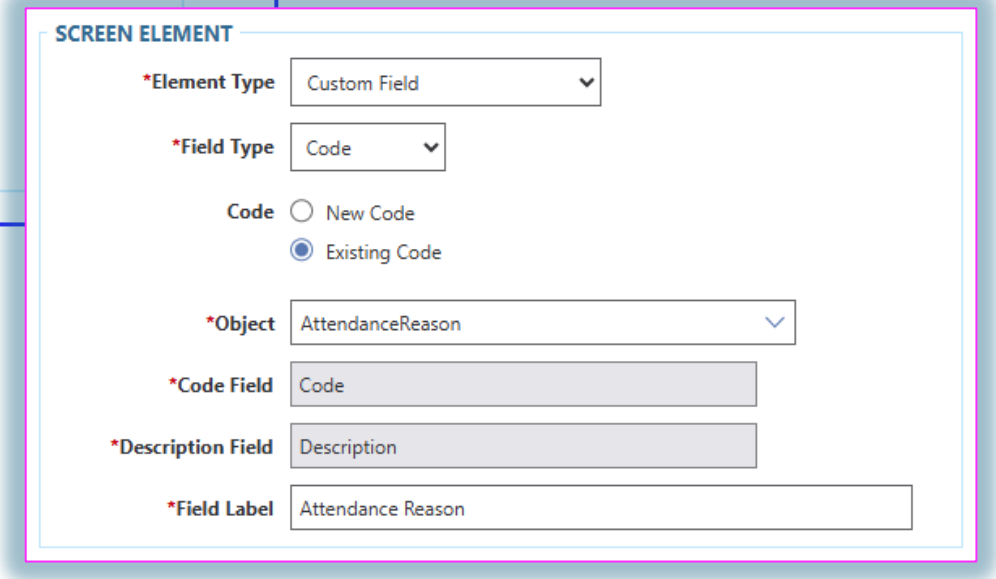
- Hyperlink

Project – Adding Elements



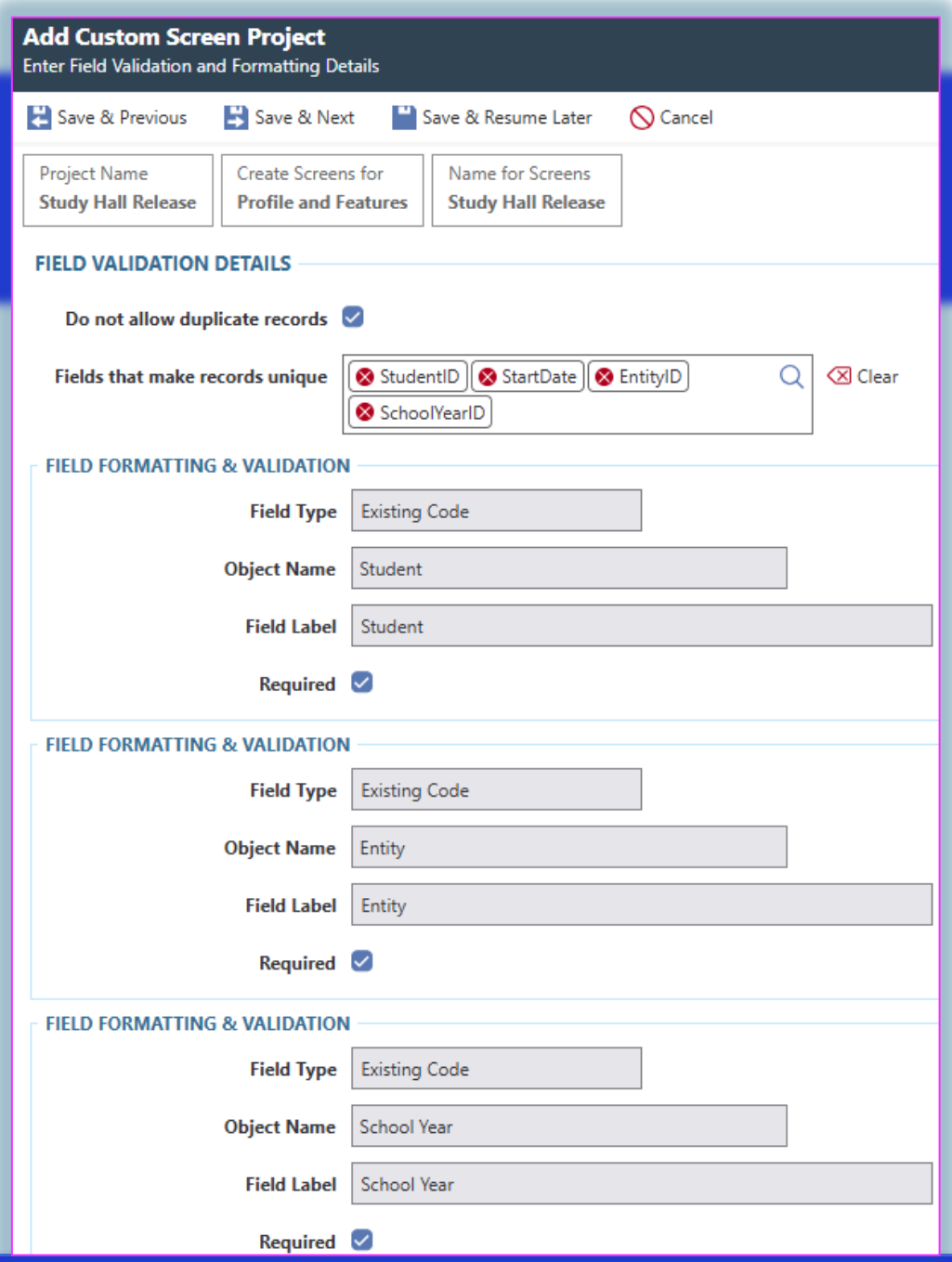
Additional elements:

- Section Header
- Informational Text
- Existing Code (not used in example)

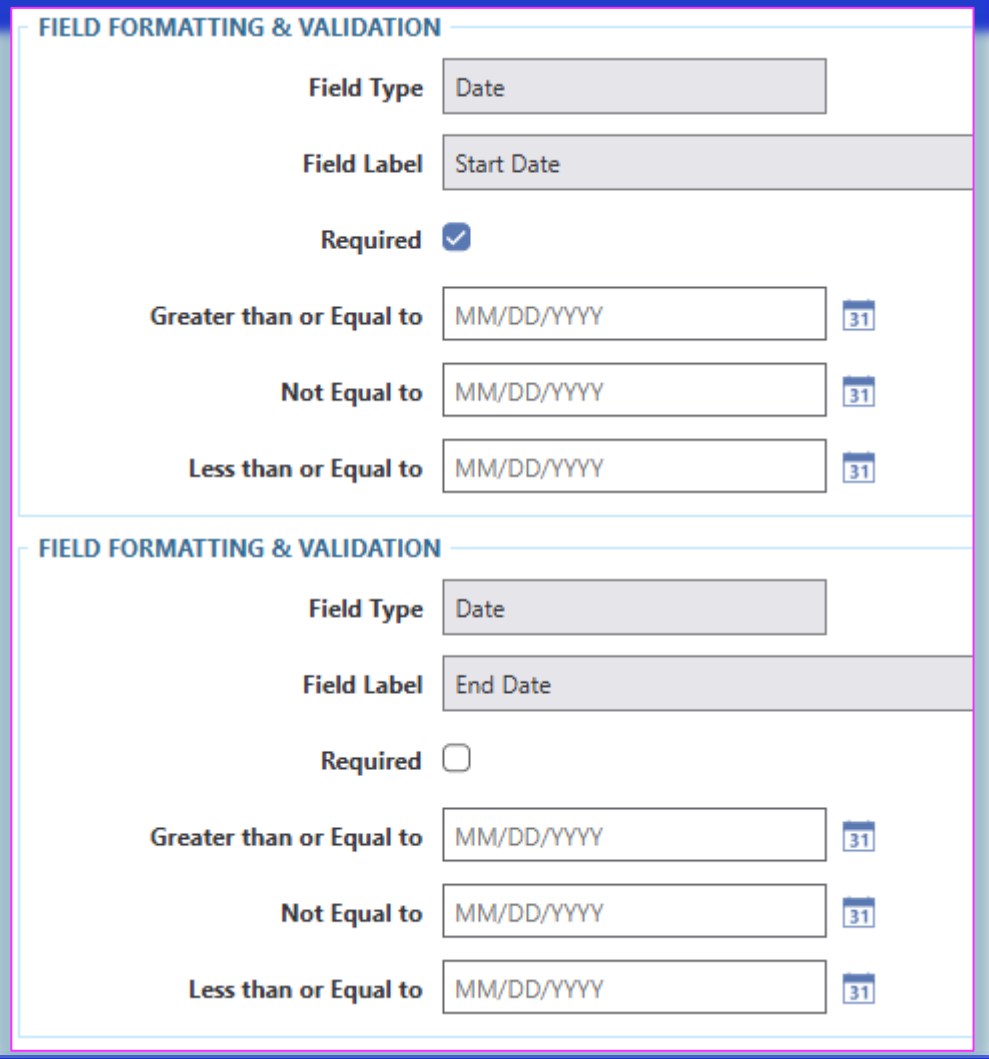


Validation & Formatting

- Do not allow duplicate records
  - Select the combination of fields that must be unique from other records in the system.
- Student, Entity, School Year
  - Required is the only validation allowed on “Existing Codes”
- Grade Level
  - This is a Skyward Read Only field, so default validation and formatting is used.
- Check-Out Required
  - No validation settings for a checkbox.

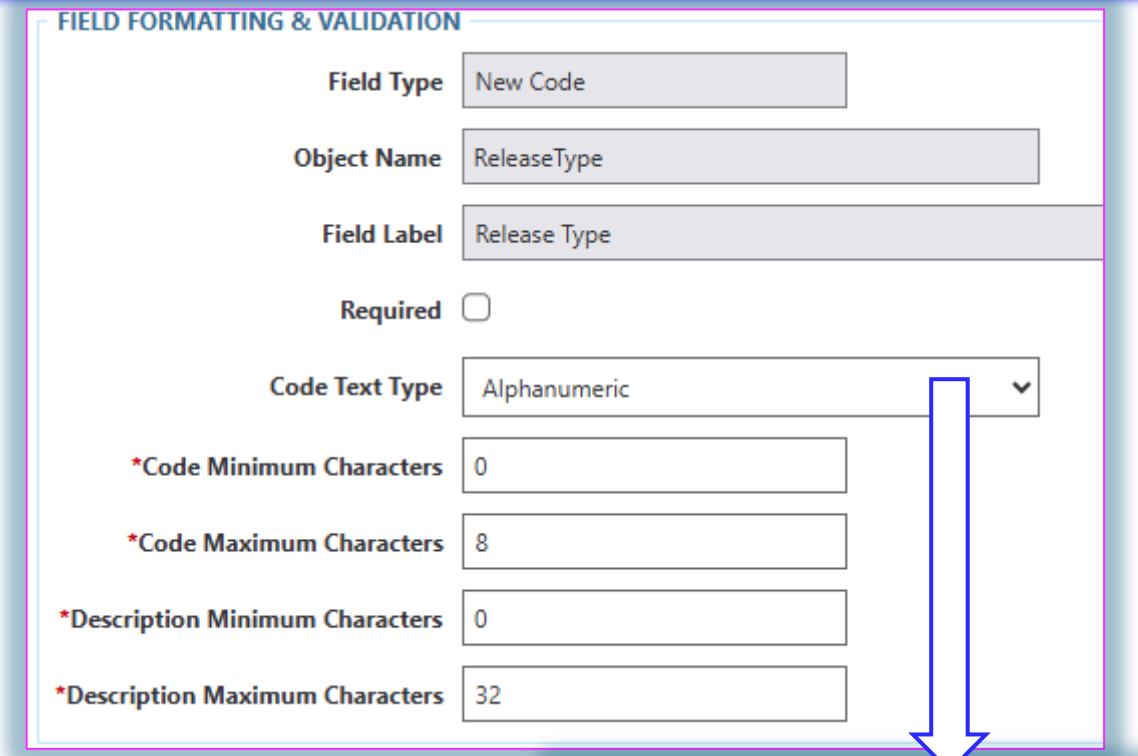


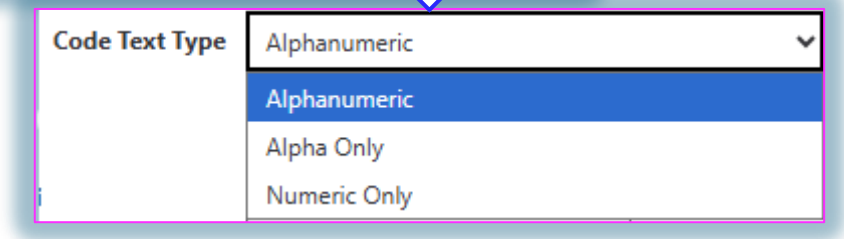
Validation & Formatting



- Date Fields
  - Required
  - Date Value Validations

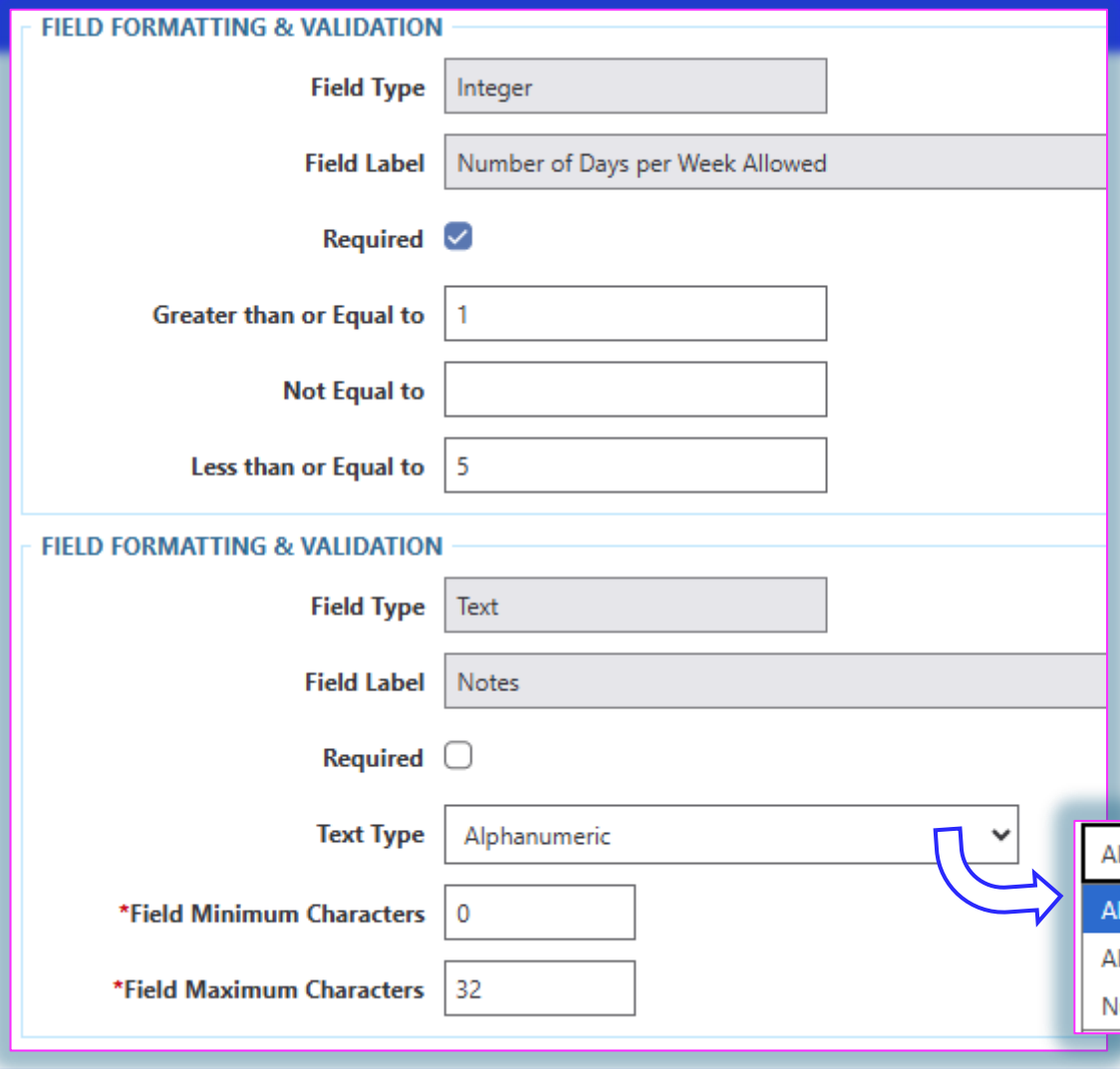
Validation & Formatting





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

Validation & Formatting



- Integer Fields
  - Required
  - Integer Value Validations
- Text Fields
  - Required
  - Text Type
  - Min/Max number of characters

Review Screens to be Created

Add Custom Screen Project
Review Screens to be Created for the Customization Project

← Previous → Next ⊘ Cancel

Project Name	Create Screens for	Name for Screens
Study Hall Release	**Profile and Features**	**Study Hall Release**

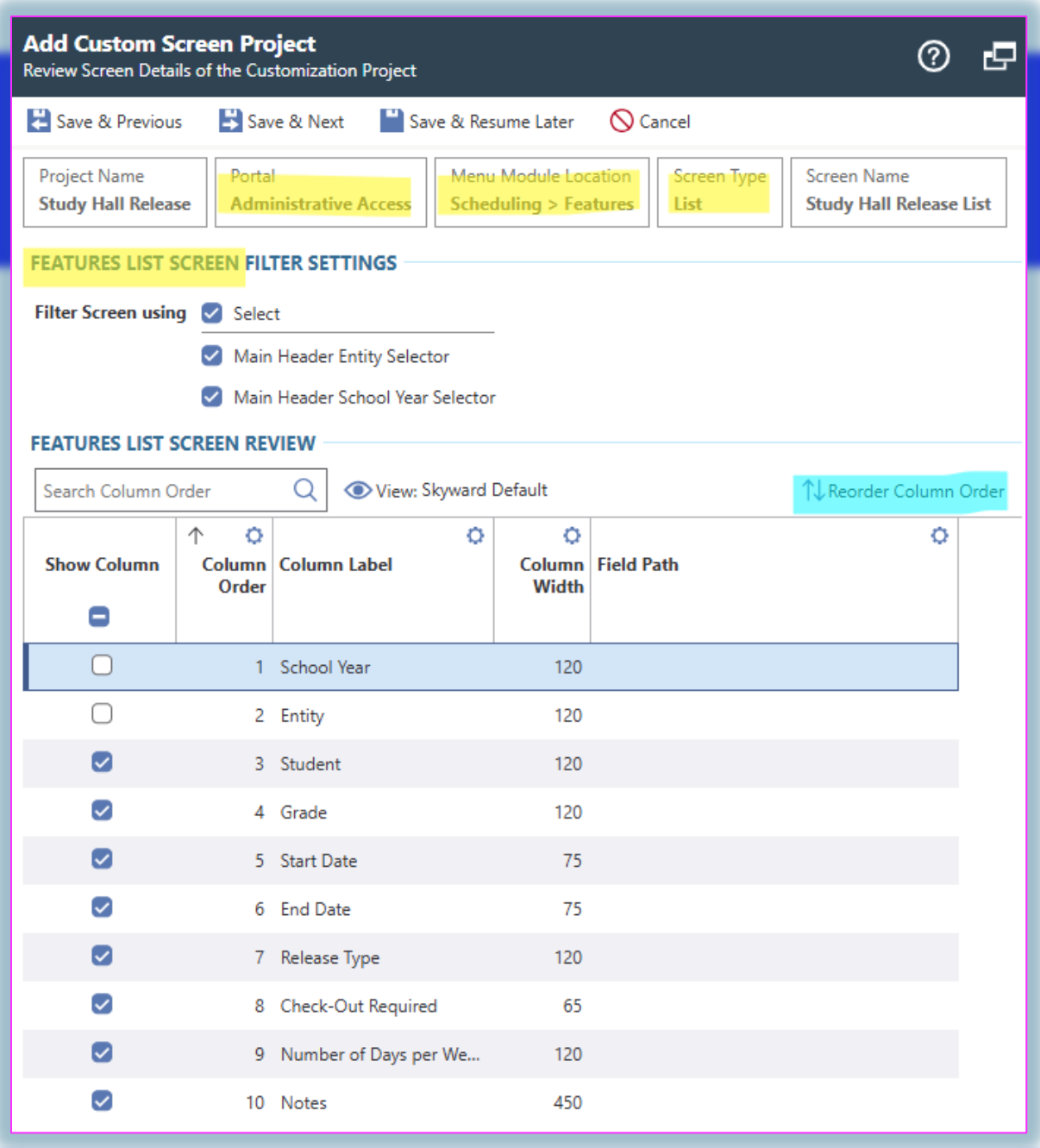
SCREENS TO BE CREATED REVIEW

Portal	↑1 Menu Module	↑2 Menu Location	Screen Name	Screen Type	Profile Module
Administrative Access	Scheduling	Codes	Release Type Details	Details	
Administrative Access	Scheduling	Codes	Release Type List	List	
Family Access	Scheduling	Features	Study Hall Release Details	Details	
Family Access	Scheduling	Features	Study Hall Release List	List	
Student Access	Scheduling	Features	Study Hall Release Details	Details	
Student Access	Scheduling	Features	Study Hall Release List	List	
Administrative Access	Scheduling	Features	Study Hall Release Details	Details	
Administrative Access	Scheduling	Features	Study Hall Release List	List	
Administrative Access	Student	Student Profile	Study Hall Release Details	Details	Scheduling
Administrative Access	Student	Student Profile	Study Hall Release List	List	Scheduling

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

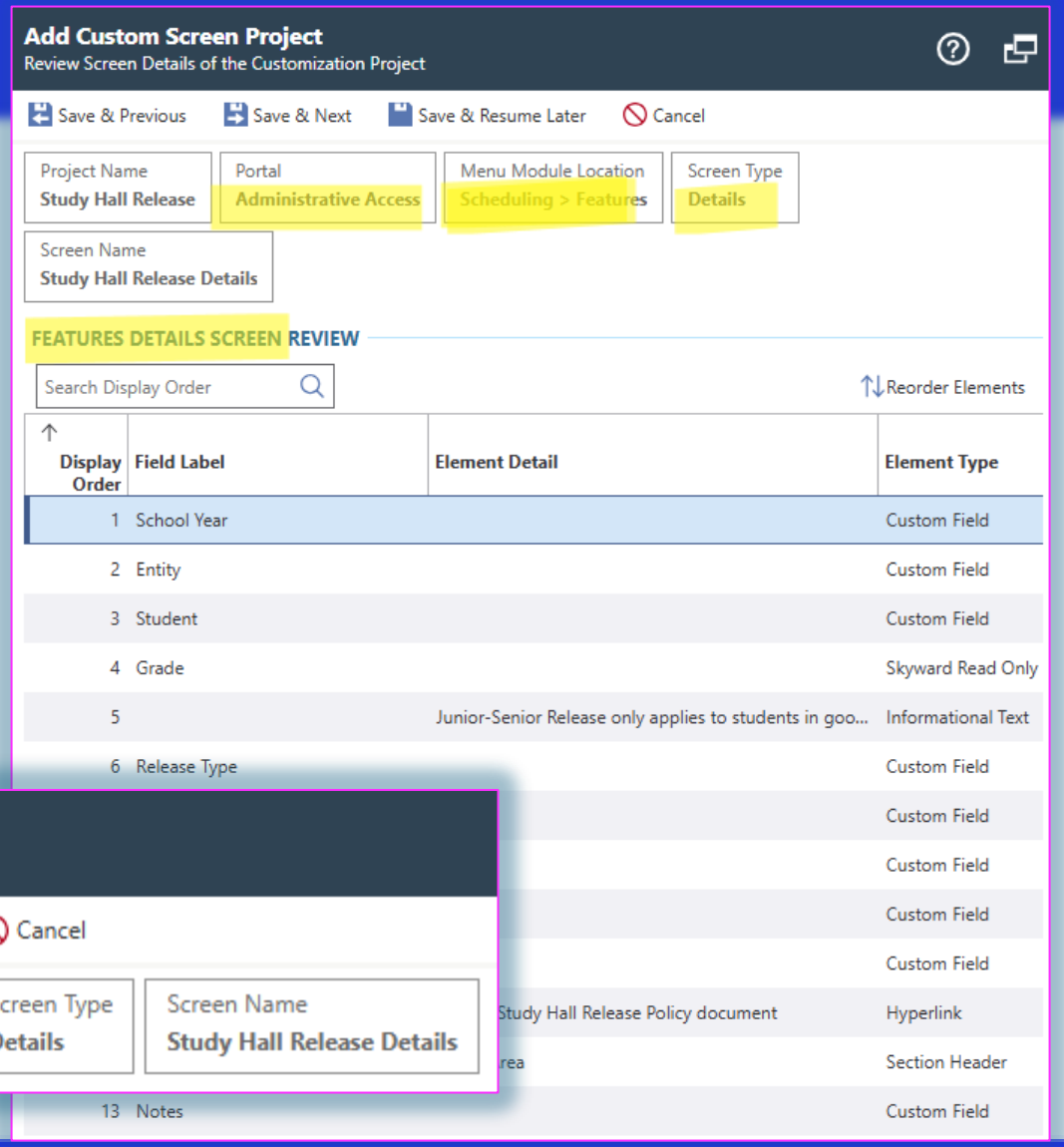
List Screen Settings

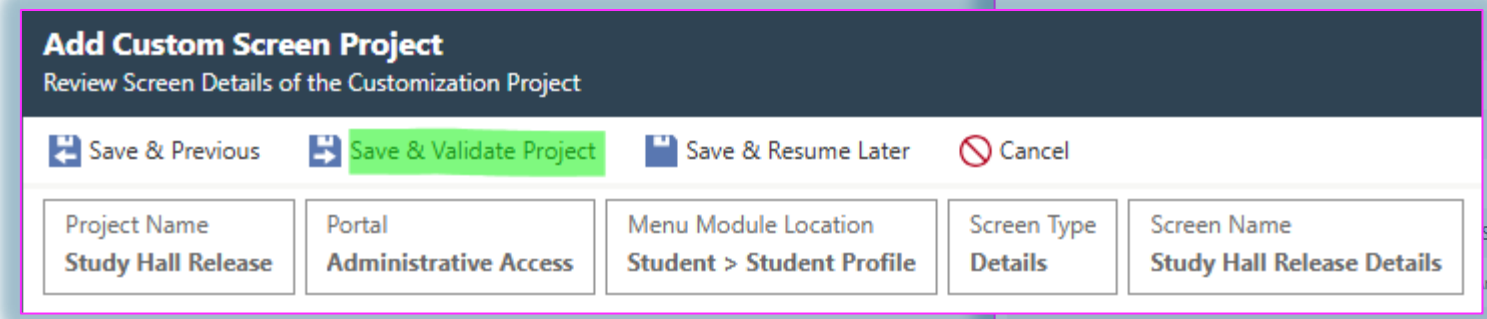
- Note the Screen Location and Type
- Choose whether the screen will automatically filter based on the window entity and school year.
- Deselect any fields you do not want on the list screen by default.
- Reorder the field columns, if desired.



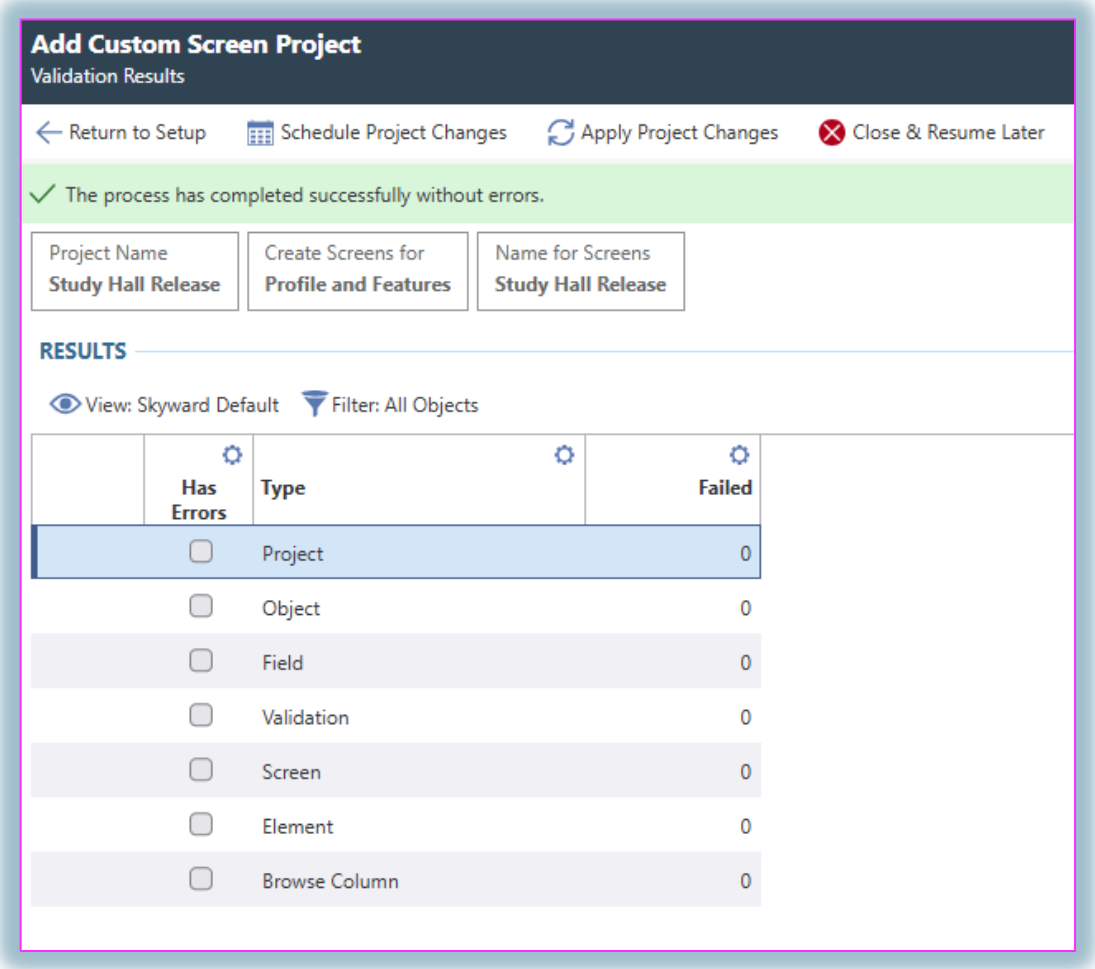
Detail Screen Settings

- Note the Screen Location and Type
- Reorder the field columns, if desired.
- *Once you have completed this process for all List and Details screens, click Save & Validate Project.*



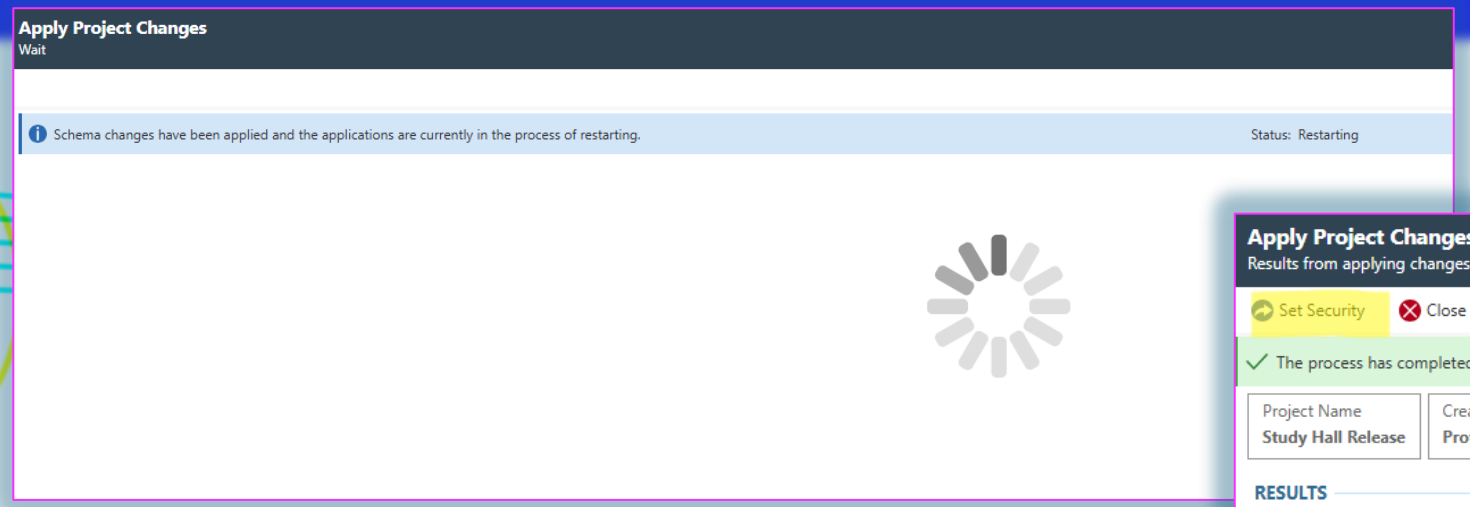


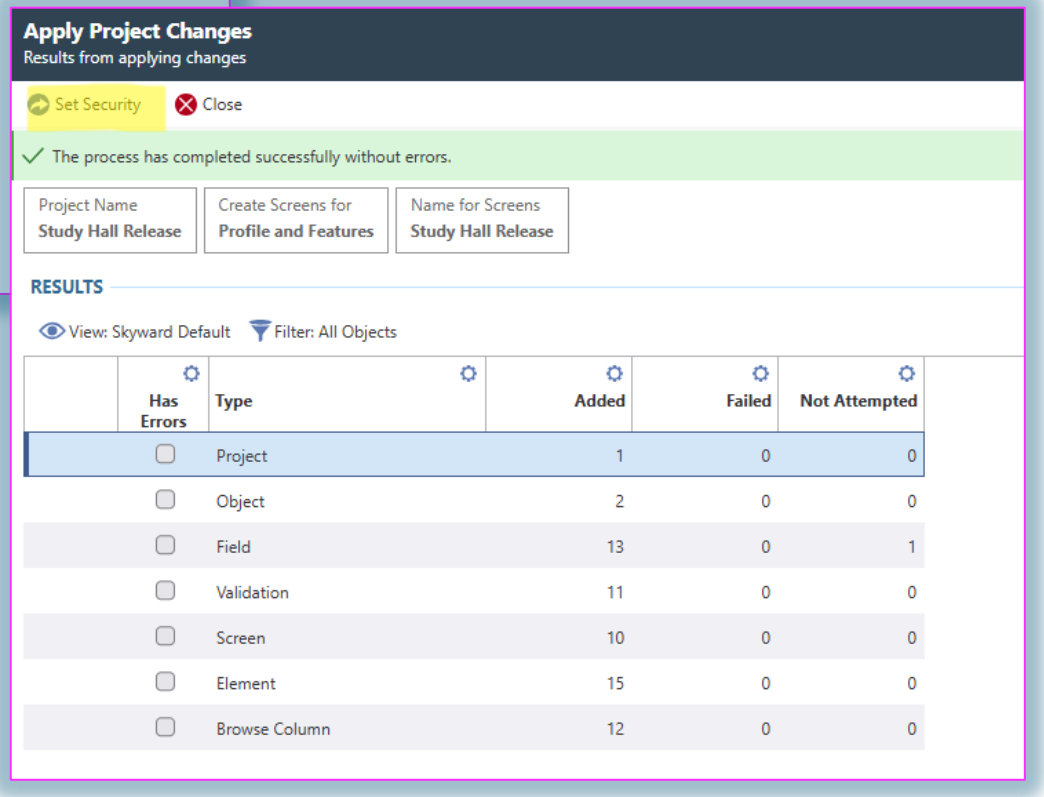
Validating the Project



- **Validation** runs through the settings to this point and ensures there are no errors.
- Once you are ready to call the project done, a process to apply the schema changes needs to run to create the new objects and fields.
- This process takes down the database, so you can use **Schedule Project Changes** to have that happen later or **Apply Project Changes** to run the process now.

Apply Project Changes

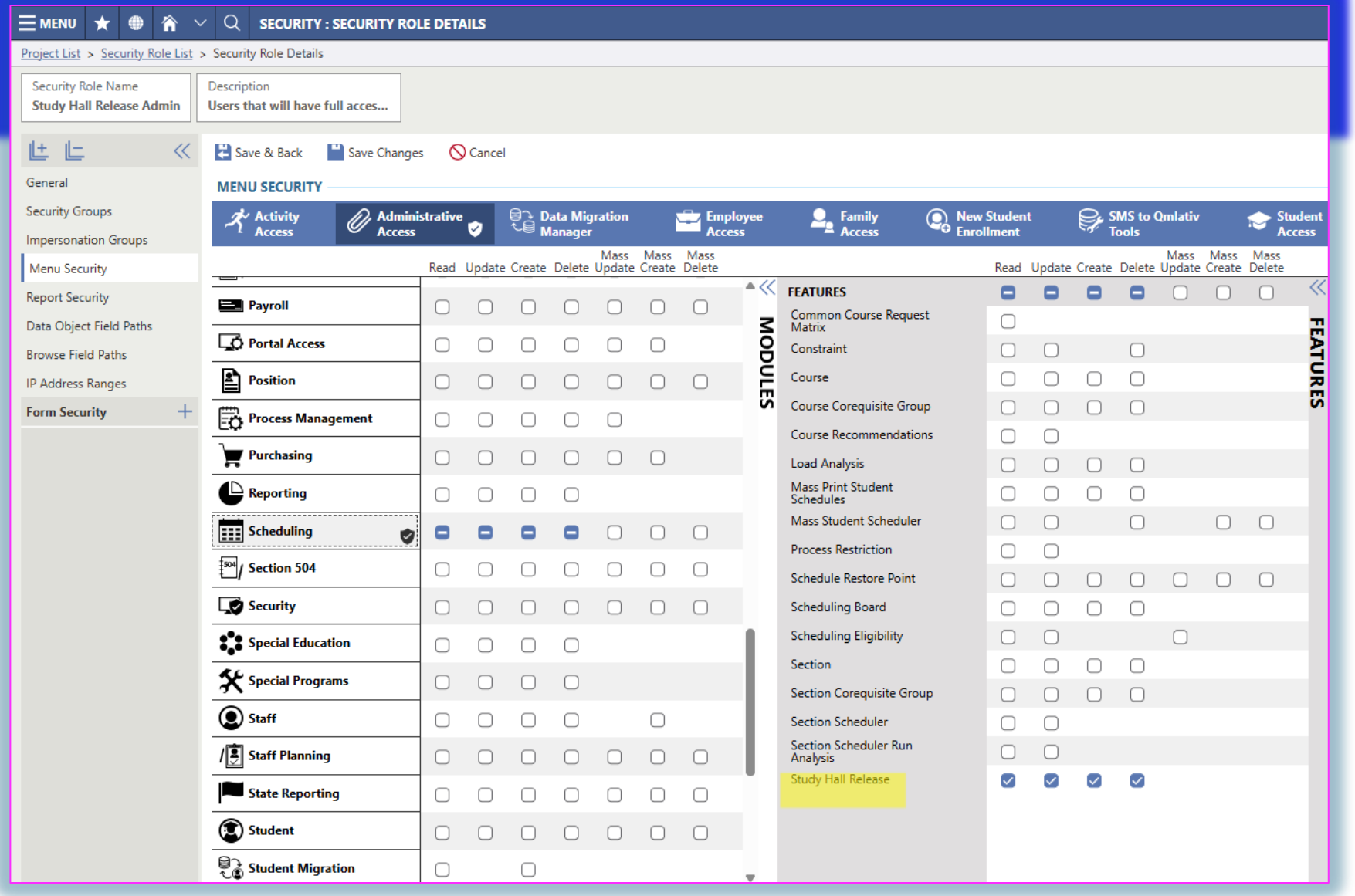




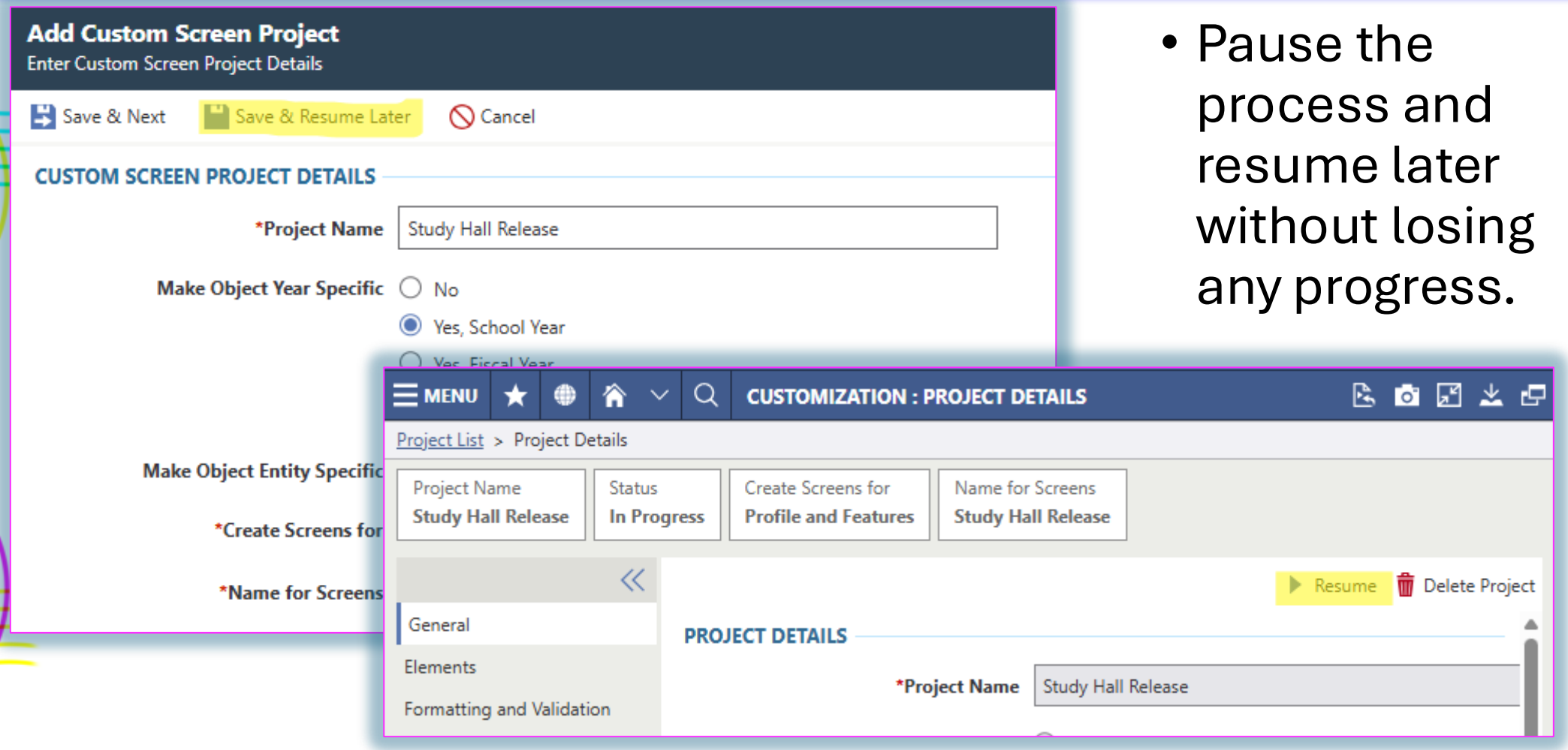
- If you use Apply Project Changes, the top screen will appear while the process is running.
- When it completes successfully, the screen to the right will appear.
- Setting security is the next step.

Set Security

- The new screens are available in menu security.



Pause and Resume



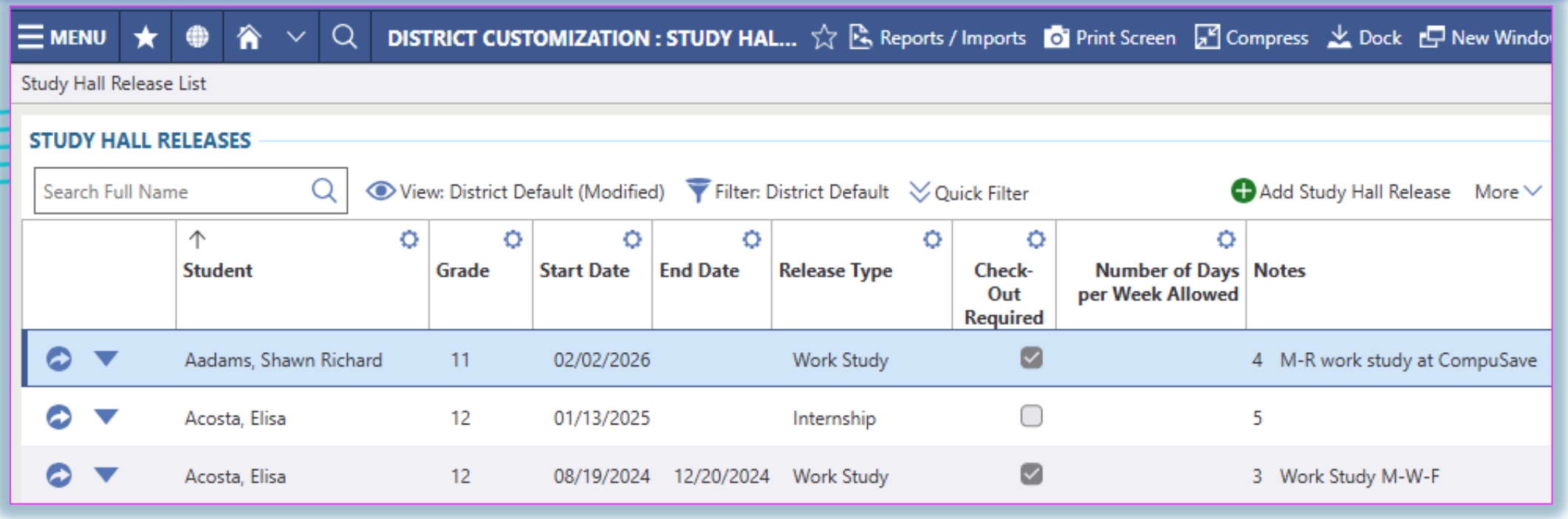
- Pause the process and resume later without losing any progress.

Features Screen

- The features screens is displayed under the Scheduling module > Features list.



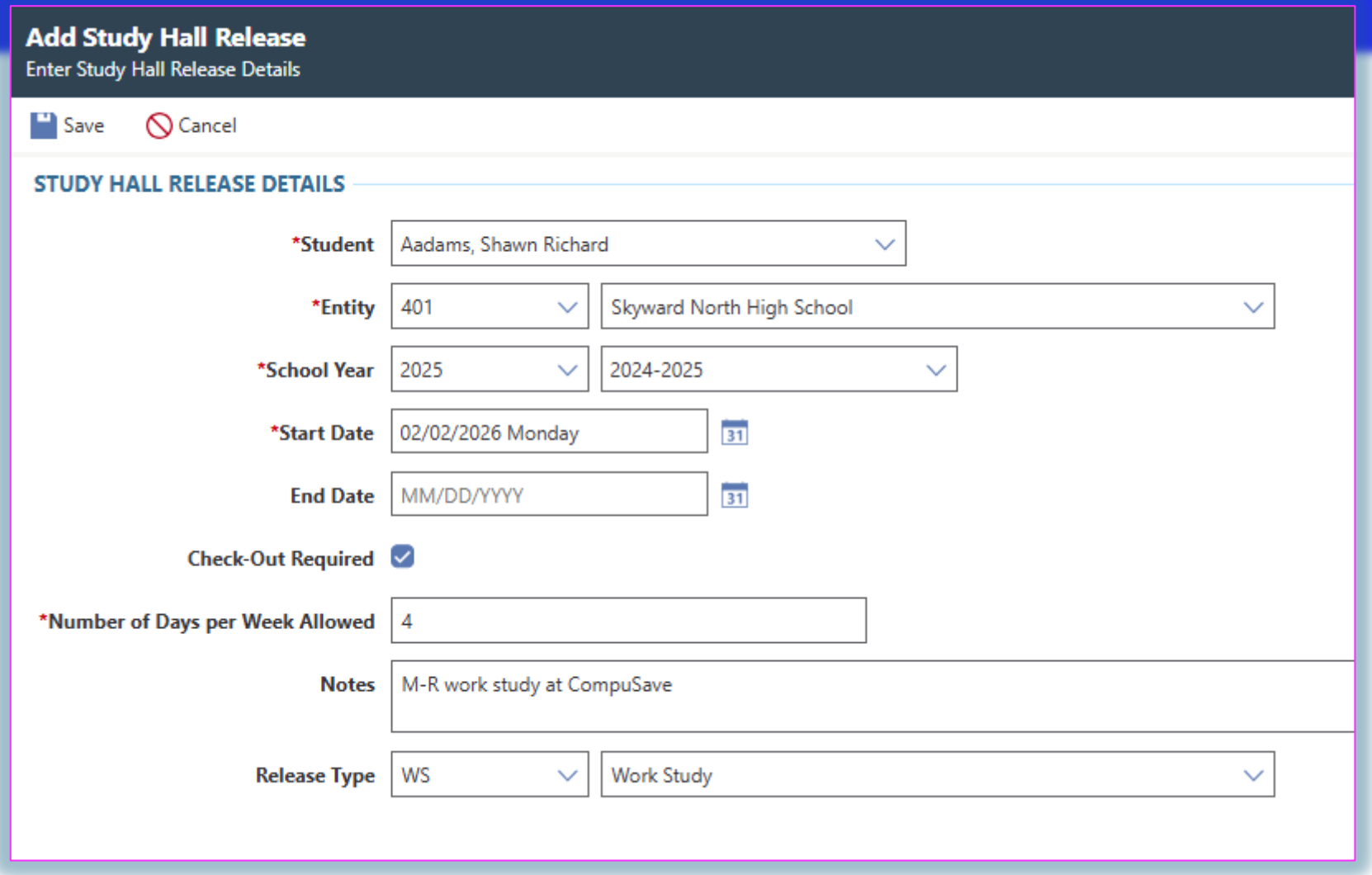
Features List Screen



- The Features list shows all students for this entity and school year.

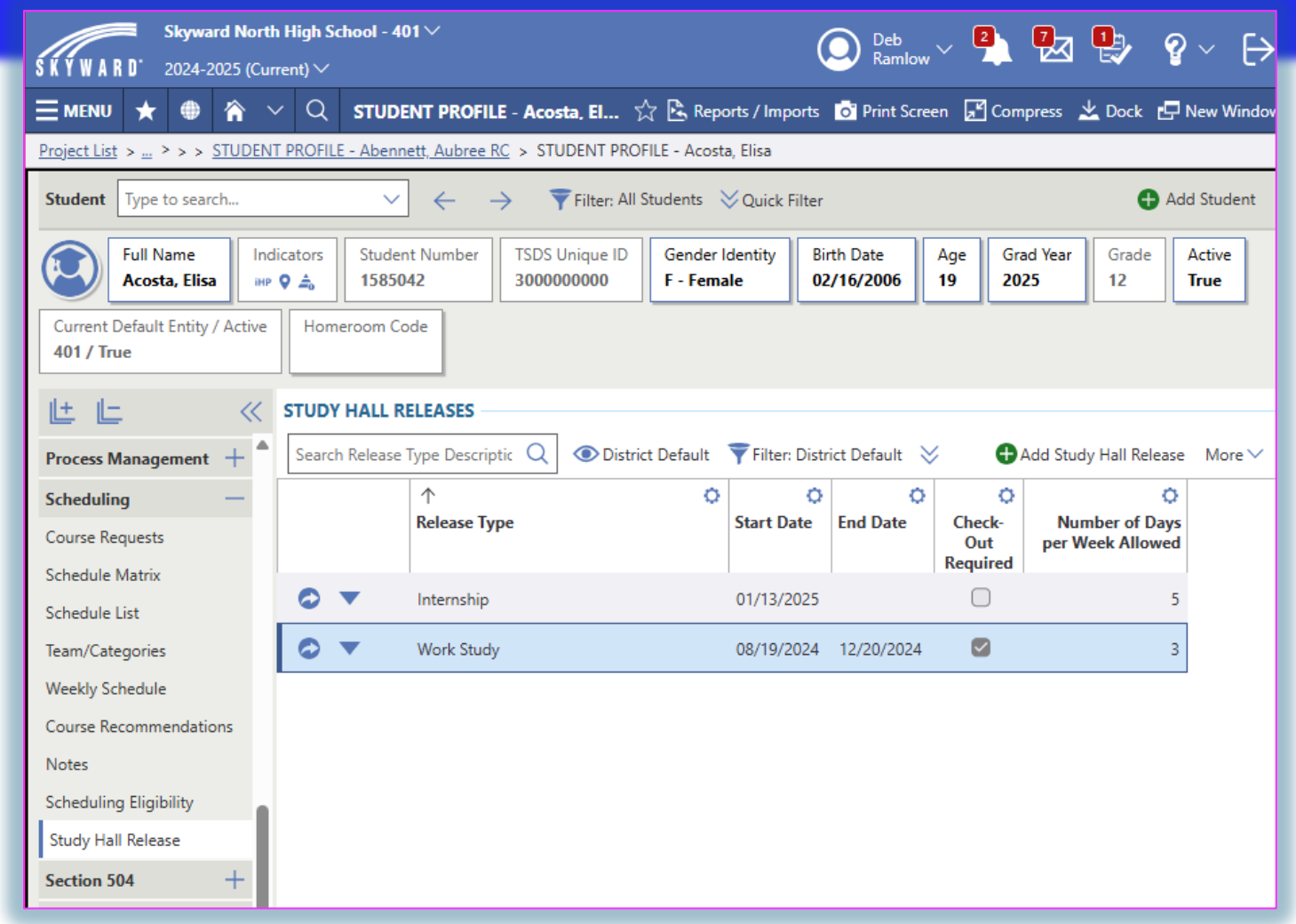
Add from Features

- Note that adding a record from the features list, you need to select the student.

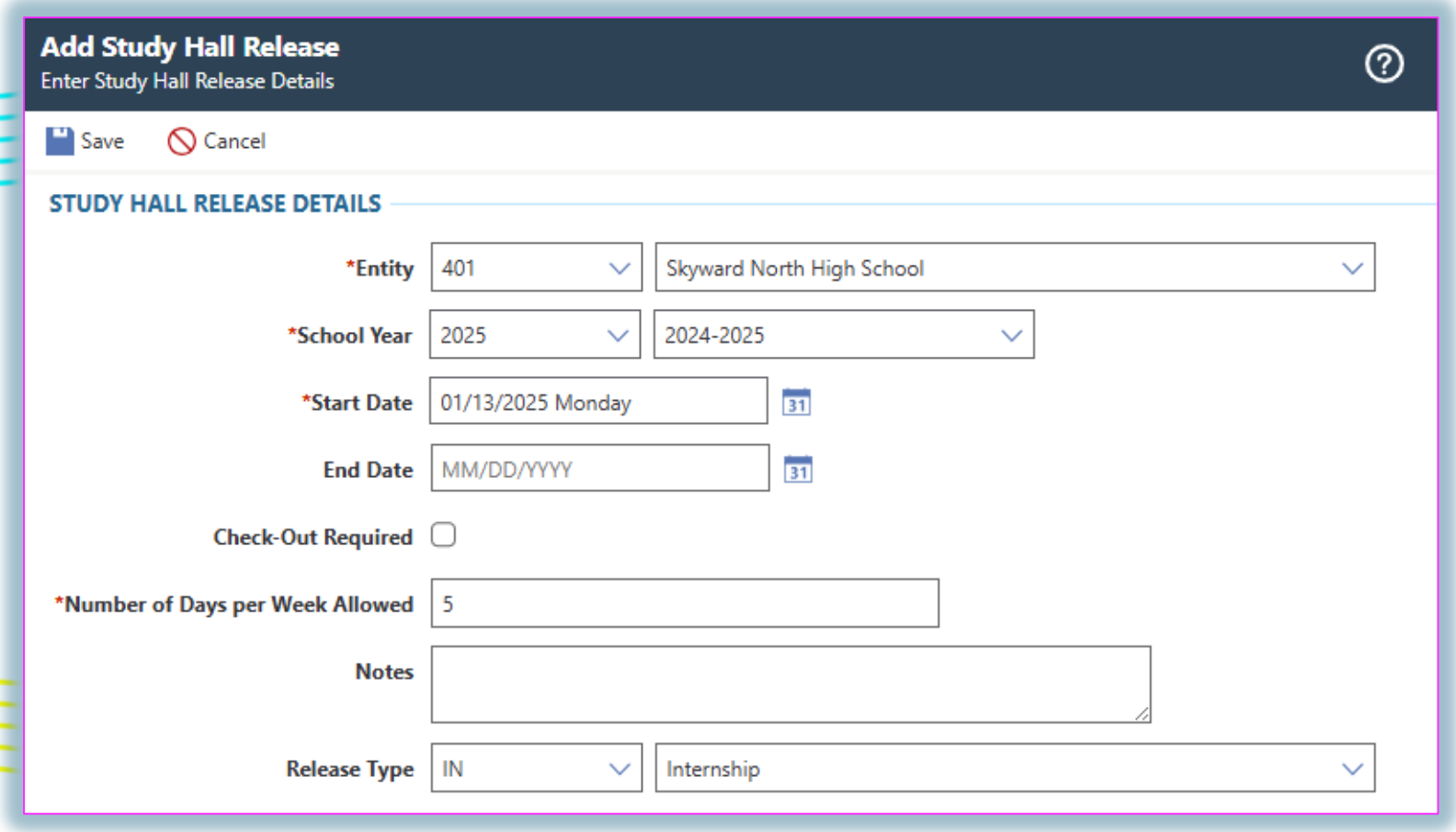


Student Profile

- Records only show for the entity and the school year in the window.



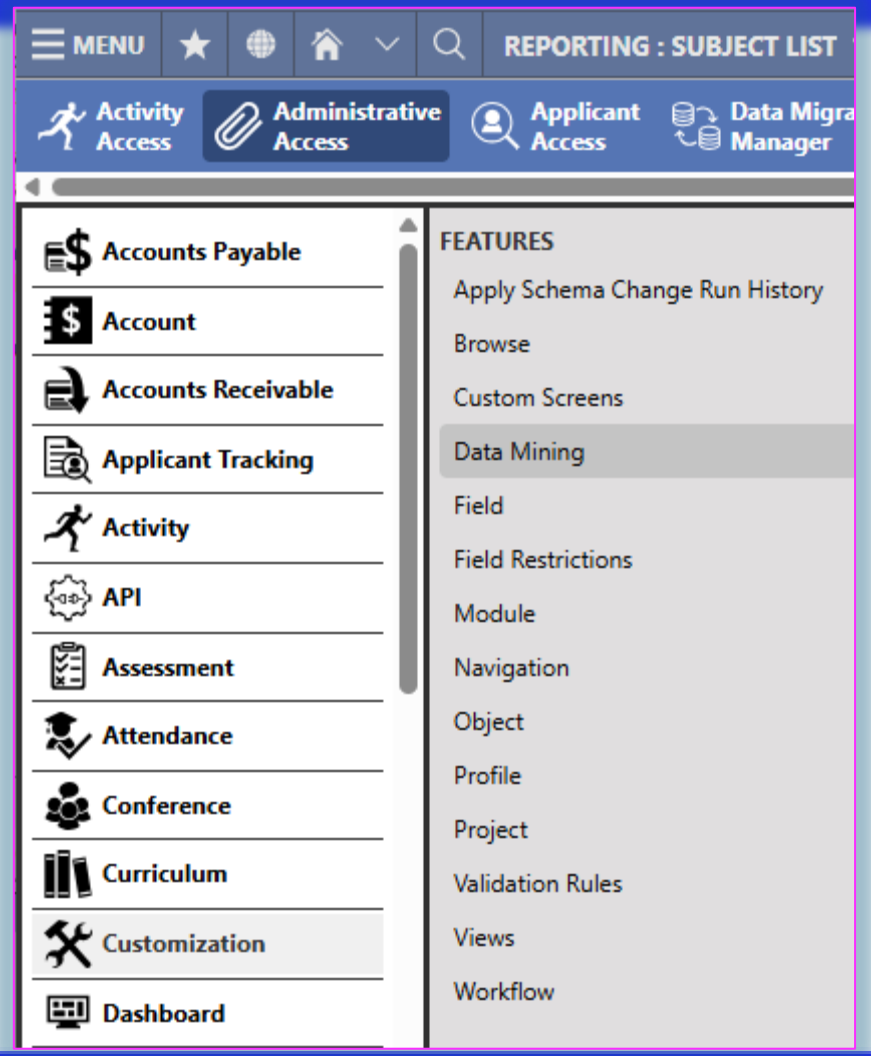
Add from Student Profile



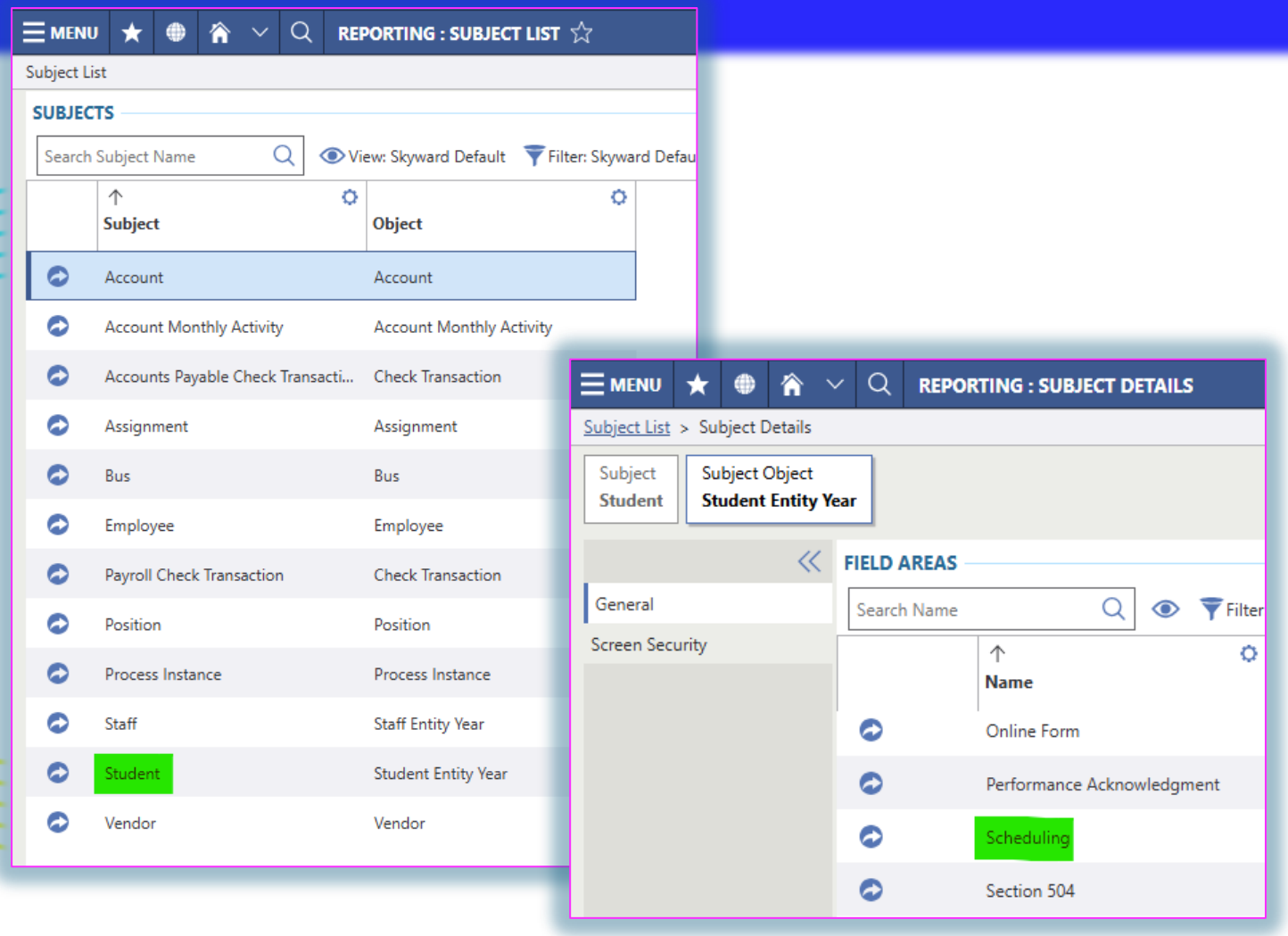
- The process already knows the student when adding a record from the student profile, so no student selector is present.

Adding Custom Fields to Data Mining

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

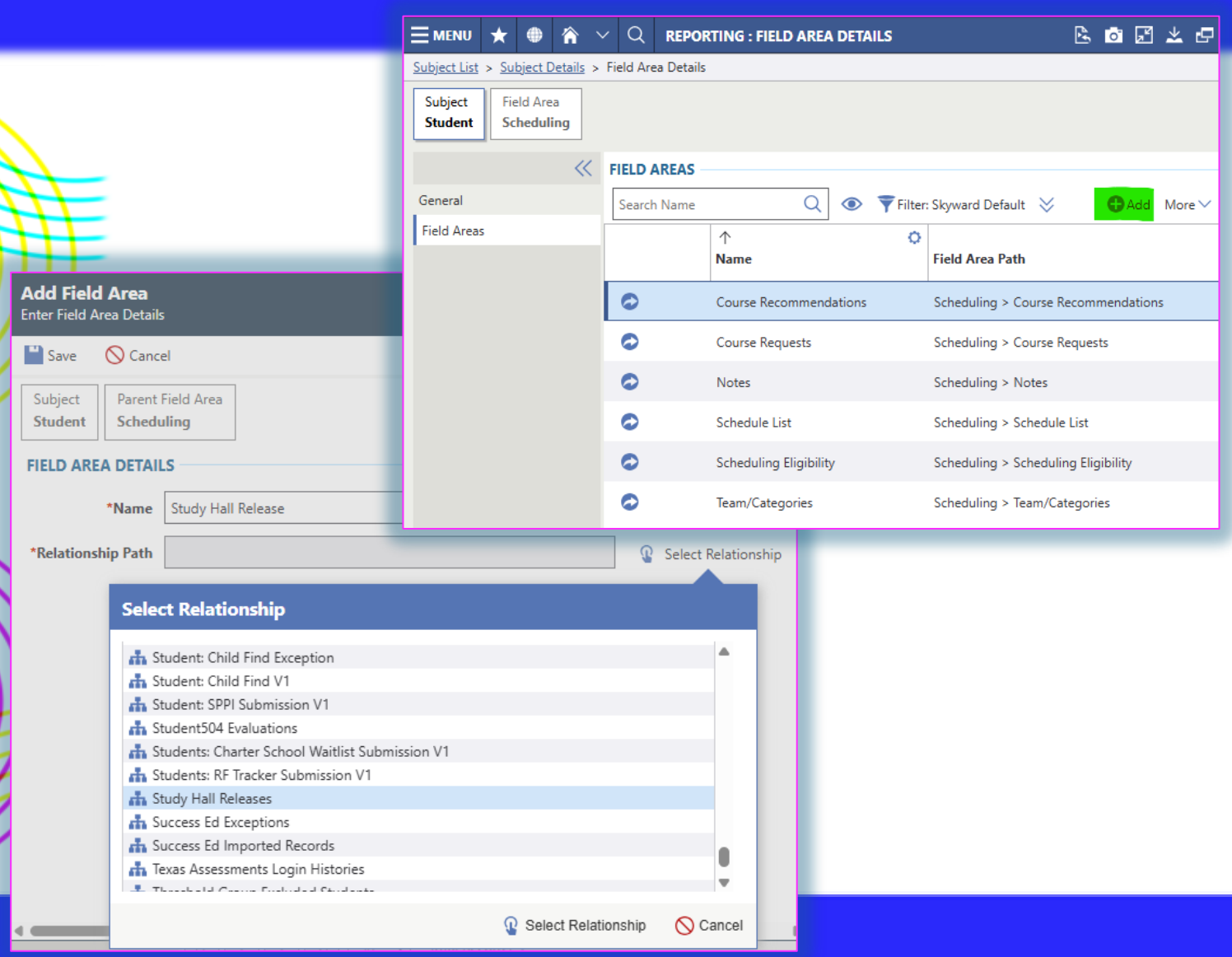


Select the Subject and Field Area



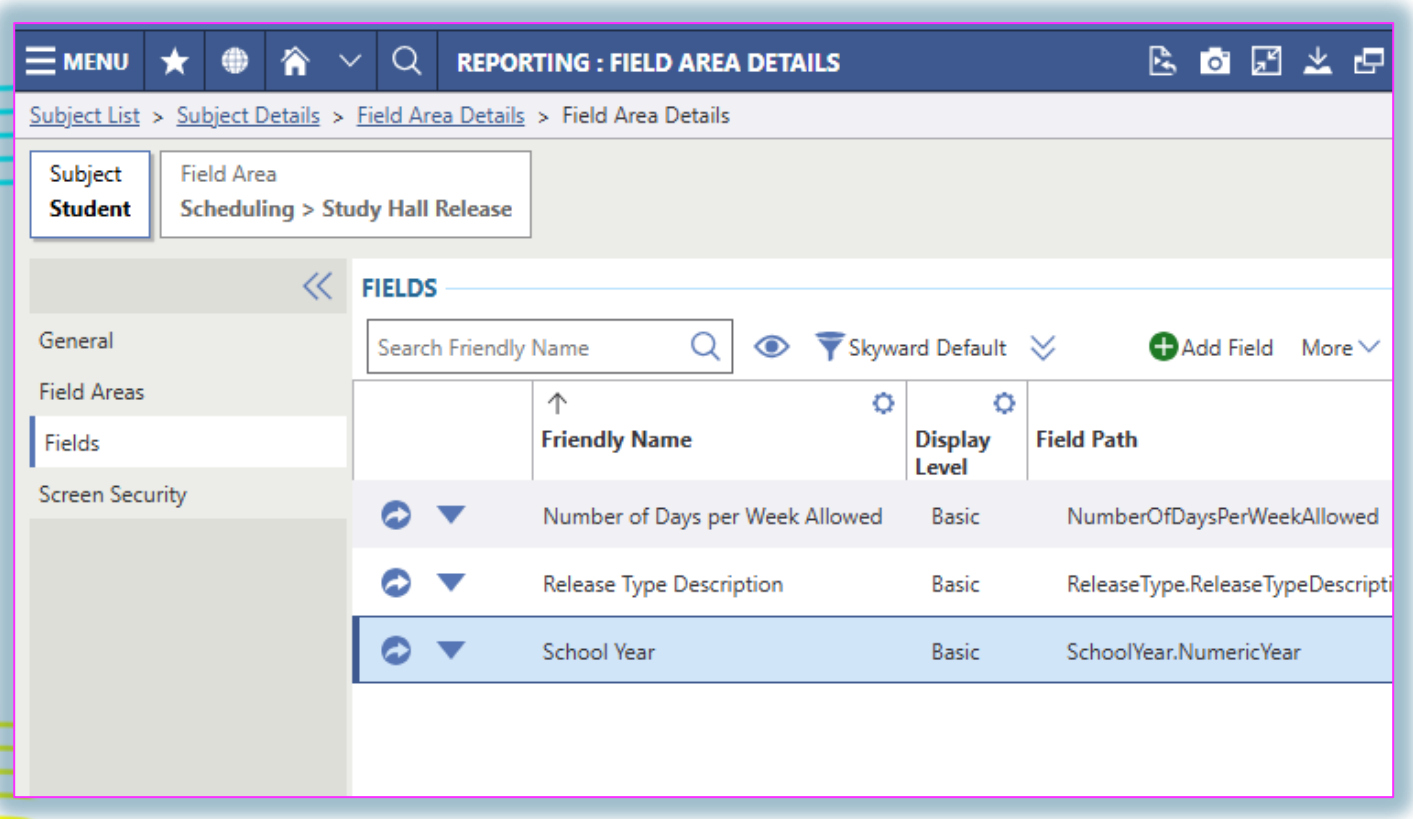
- Study Hall Release is related to students, so we select the Student subject.
- The data appears in the Scheduling module, so select the Scheduling field area.

New Secondary Field Area



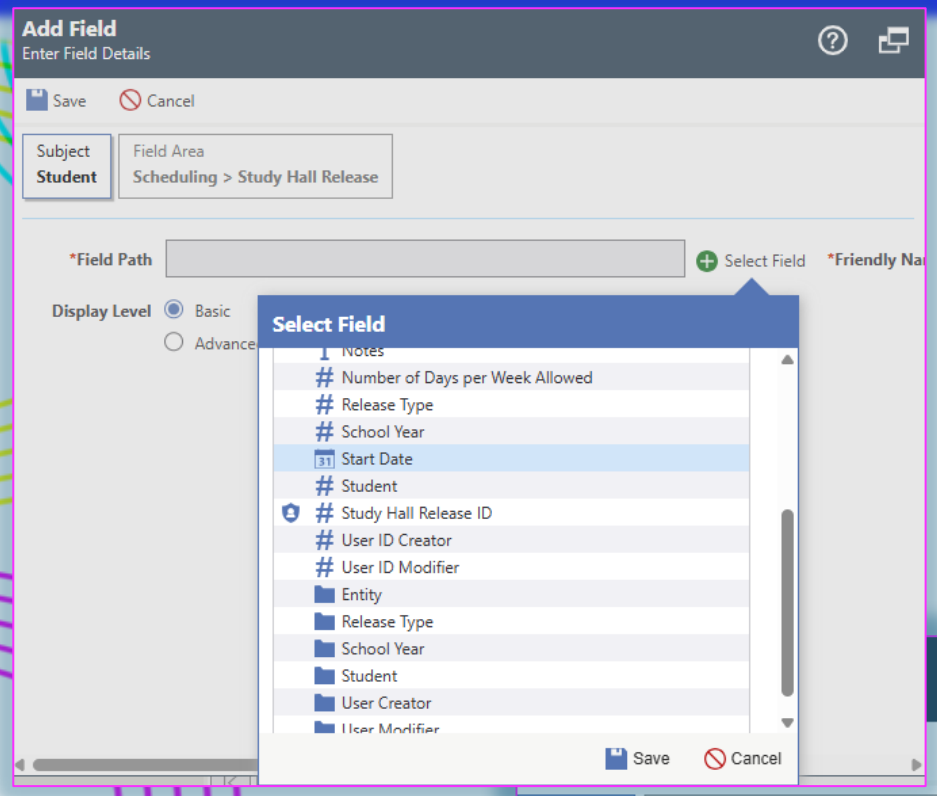
- Add a new Secondary Field Area
- Enter a Name that will become the folder label
- Select the Study Hall Releases relationship

Secondary Field Area

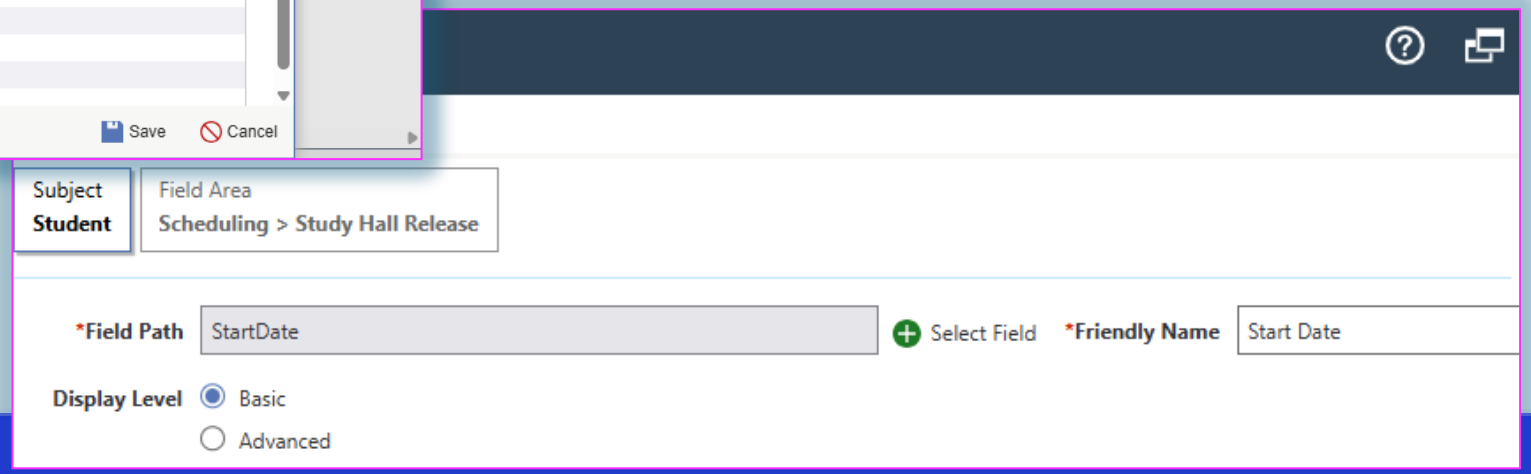


- **Field Areas** is used if there is another level of child records.
- **Fields** are the fields from this object that will be available in Data Mining.
- **Screen Security** is the list of screens that grant access to these fields in Data Mining.

Adding Fields

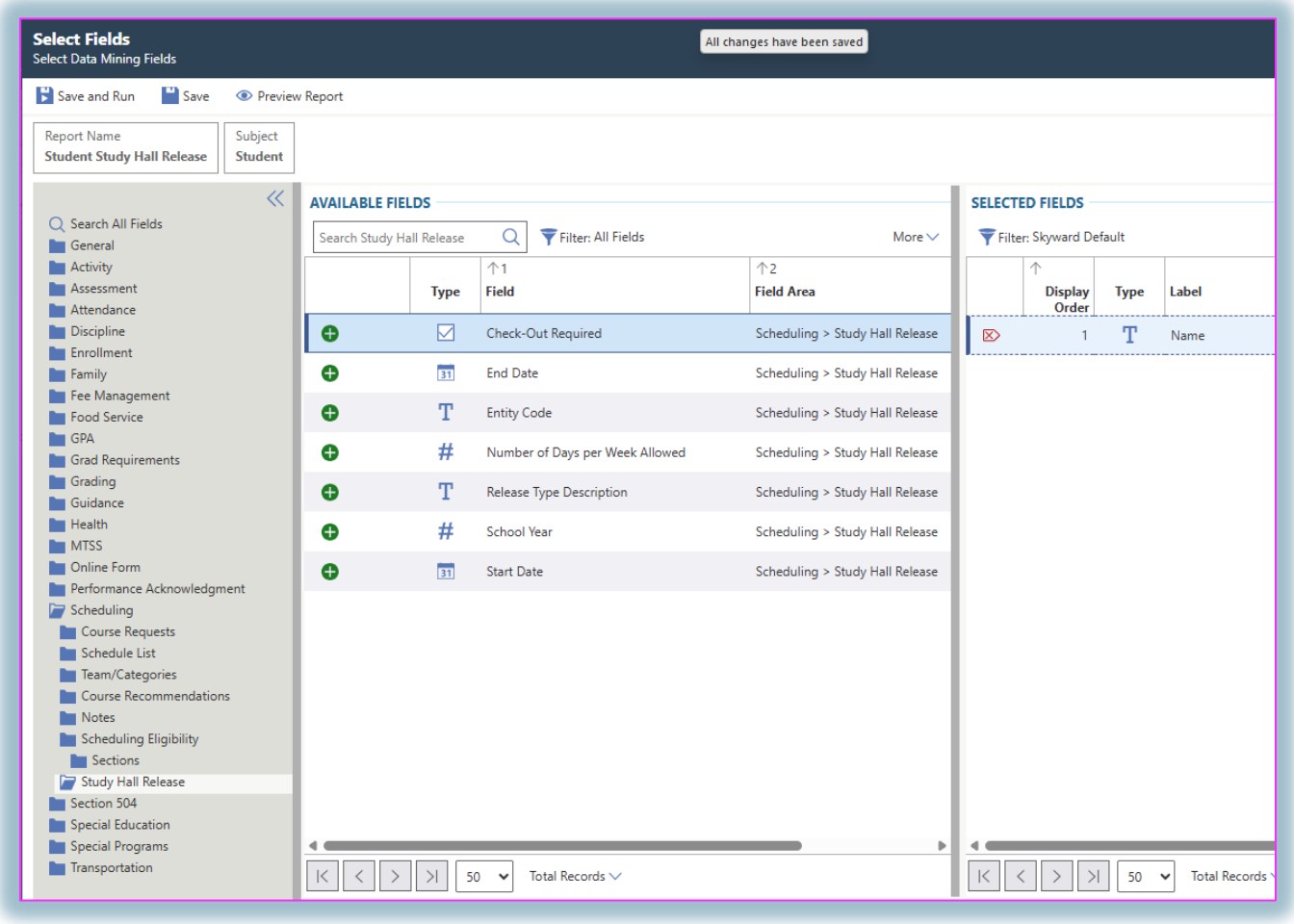


- Select the field from the tree browse
- Enter a friendly name to display in Data Mining
- Determine if this is a basic (used often) or advanced (infrequent) field



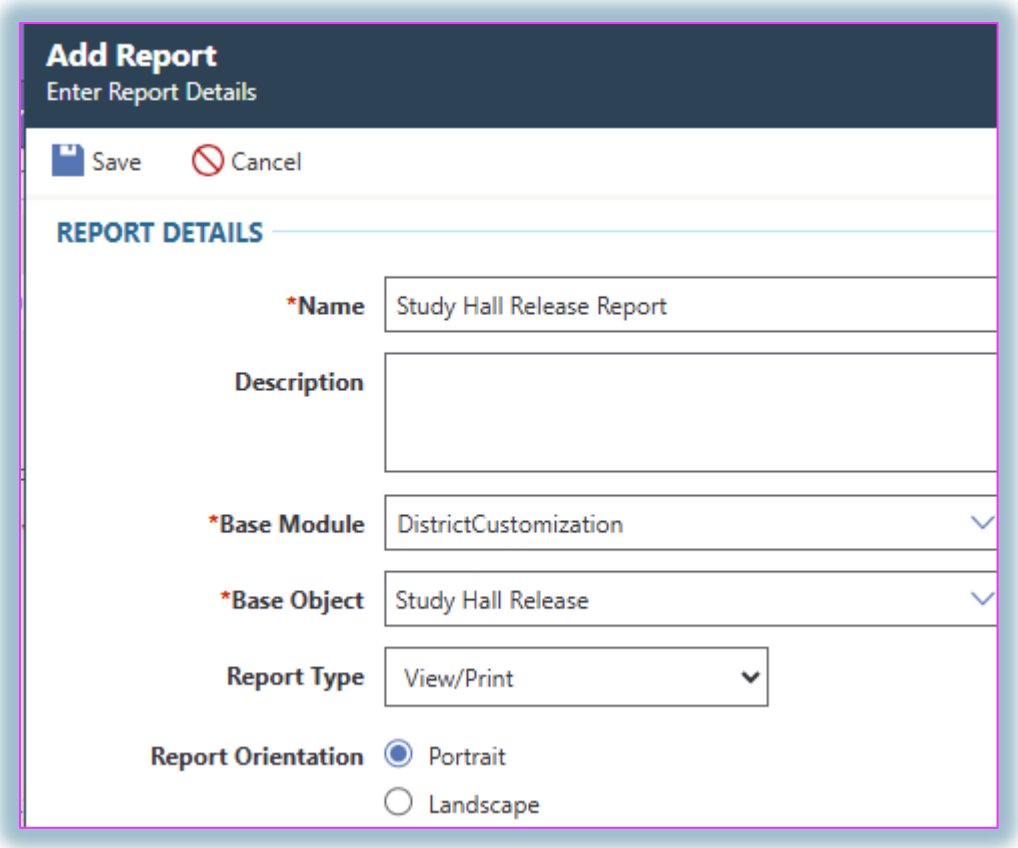
Data Mining

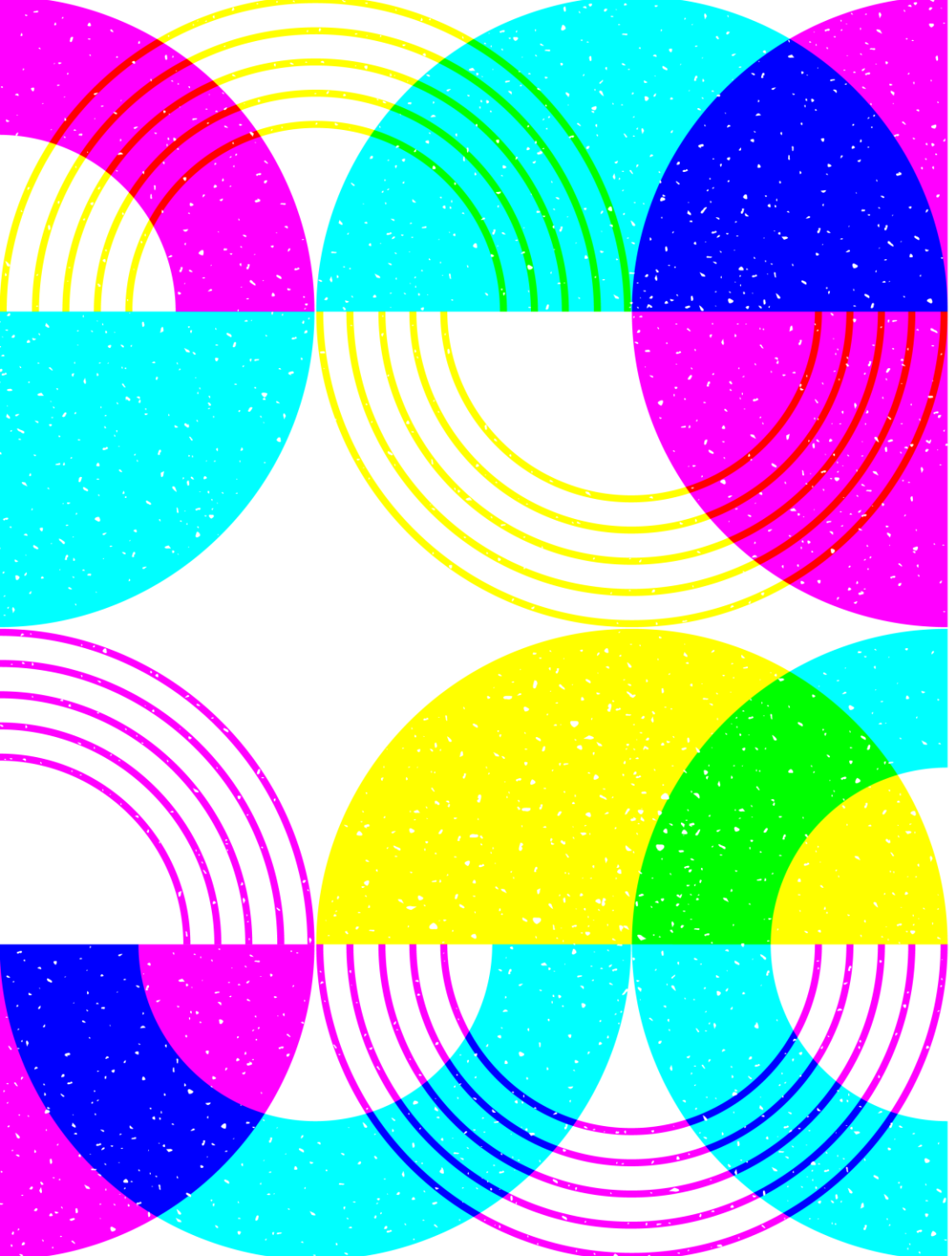
- Navigate through the Data Mining folders using the same path you use to get to the field in Student Profile.



Report Designer

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





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thank you!