



# PowerUPs

# Form Builder

**Kayla Wilkinson**

Education Impact Consultant

**Mohammed Arshad**

Technical Support Engineer

**Jeda Swaine**

Senior Enterprise Support Engineer

**Pat Elogio**

Technical Support Engineer

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# Agenda

1	Intro to Form Builder
2	Best Practices
3	Revisions (Details, Pages, Elements, Logic, Regex, Lists, Additional Content)
4	Resources
5	Q&A
6	Upcoming Events & Webinars



# Intro into Form Builder

What can it do, How to access it

# What can Form Builder do?

<https://docs.powerschool.com/PSEHA/configuration/form-builder/configure-a-form>

Form Changes

Translation Changes

Additional Content

Print Templates

# How to Access Form Builder

<https://docs.powerschool.com/PSEHA/configuration/form-builder>

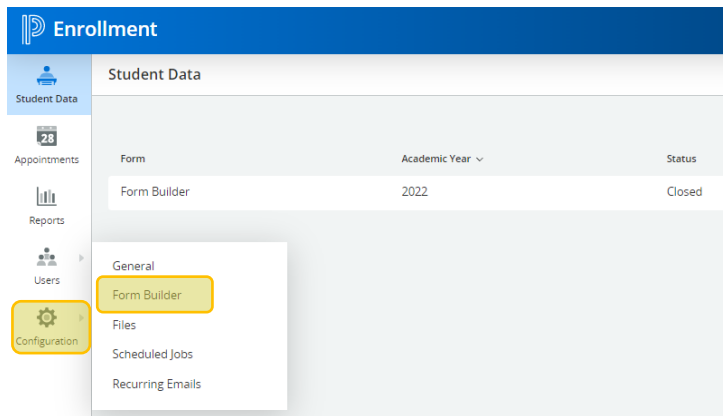
Configuration



Form Builder



Click on the  
Form you wish  
to edit

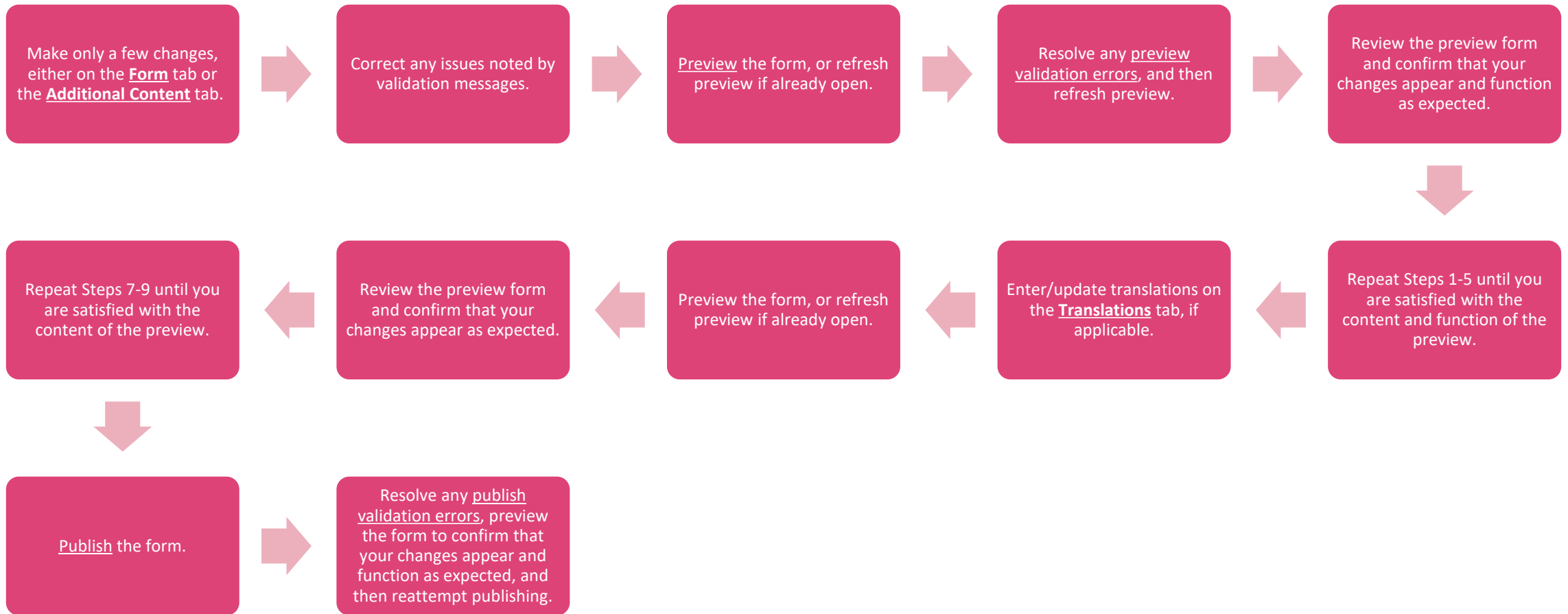




# Best Practices

# Form Builder Best Practices

<https://docs.powerschool.com/PSEHA/configuration/form-builder/manage-form-elements/best-practices>





# Revisions

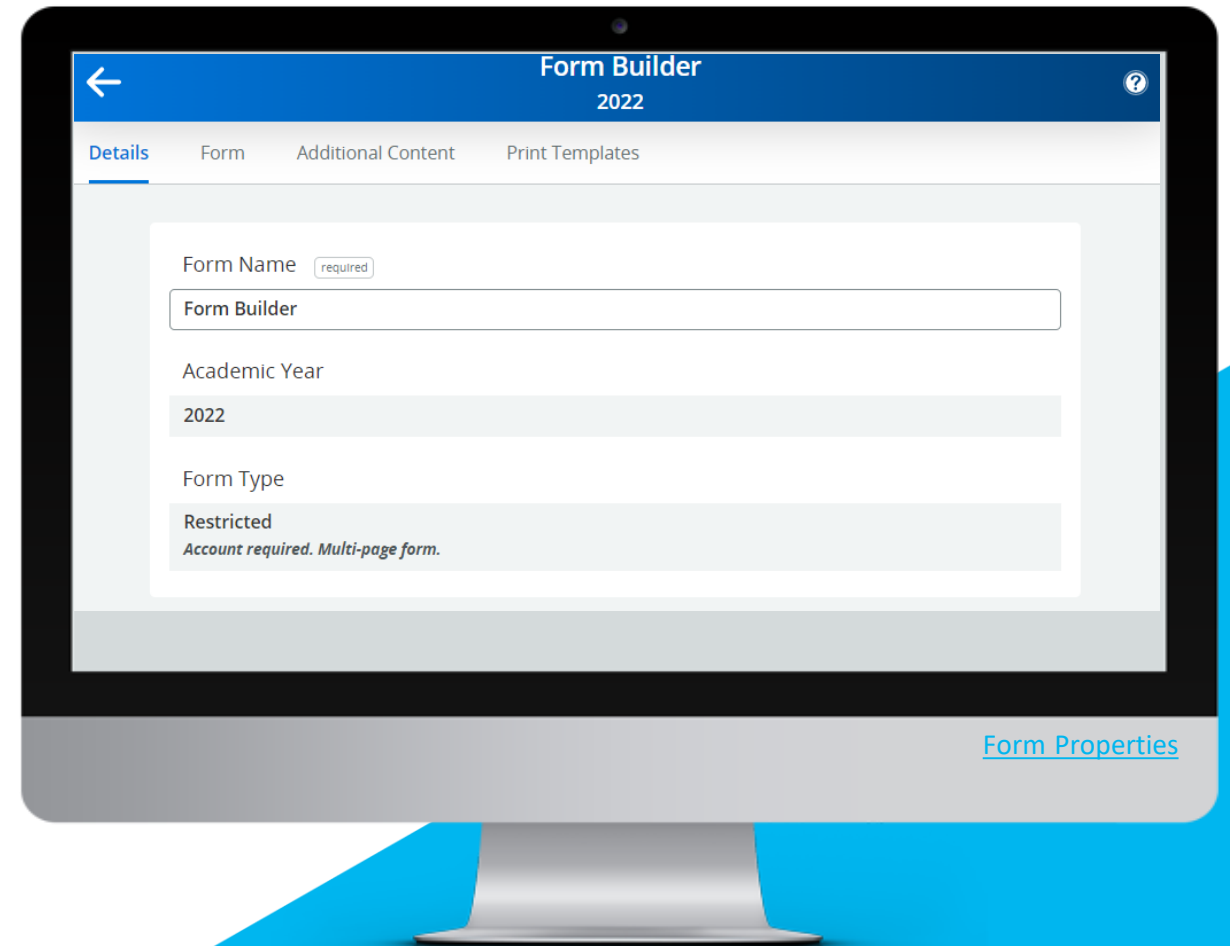
Details, Pages, Elements, Logic, Regex, Lists, Additional Content



# Revision #1: Form Details

Change the name of the form to "New Student Registration"

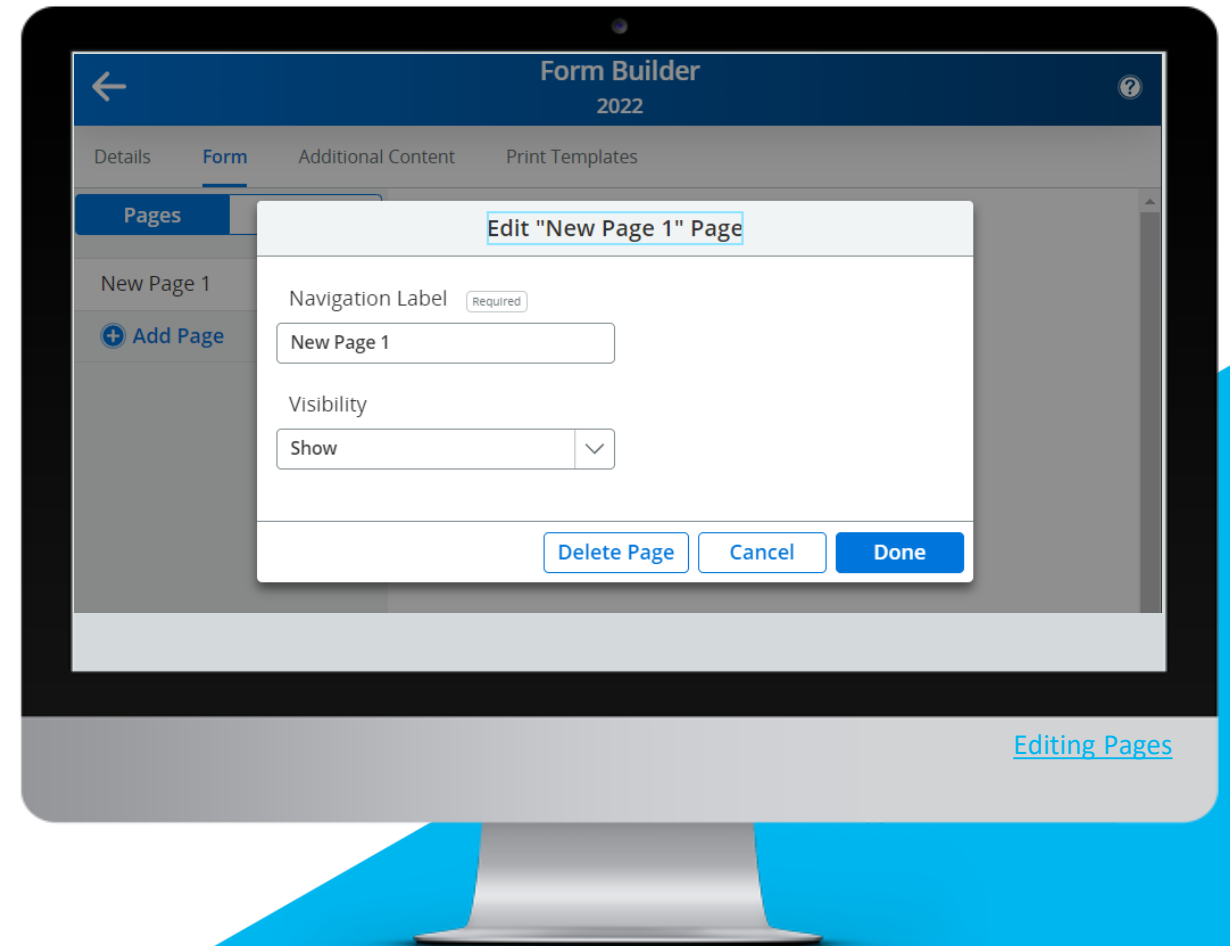
Configuration > Form Builder > choose form > Details tab > Form Name



# Revision #2: Page Label

Rename "New Page 1" to  
Student Information

Configuration > Form Builder > choose  
form > Form tab > Click Gear icon next to  
New Page 1 > Navigation Label

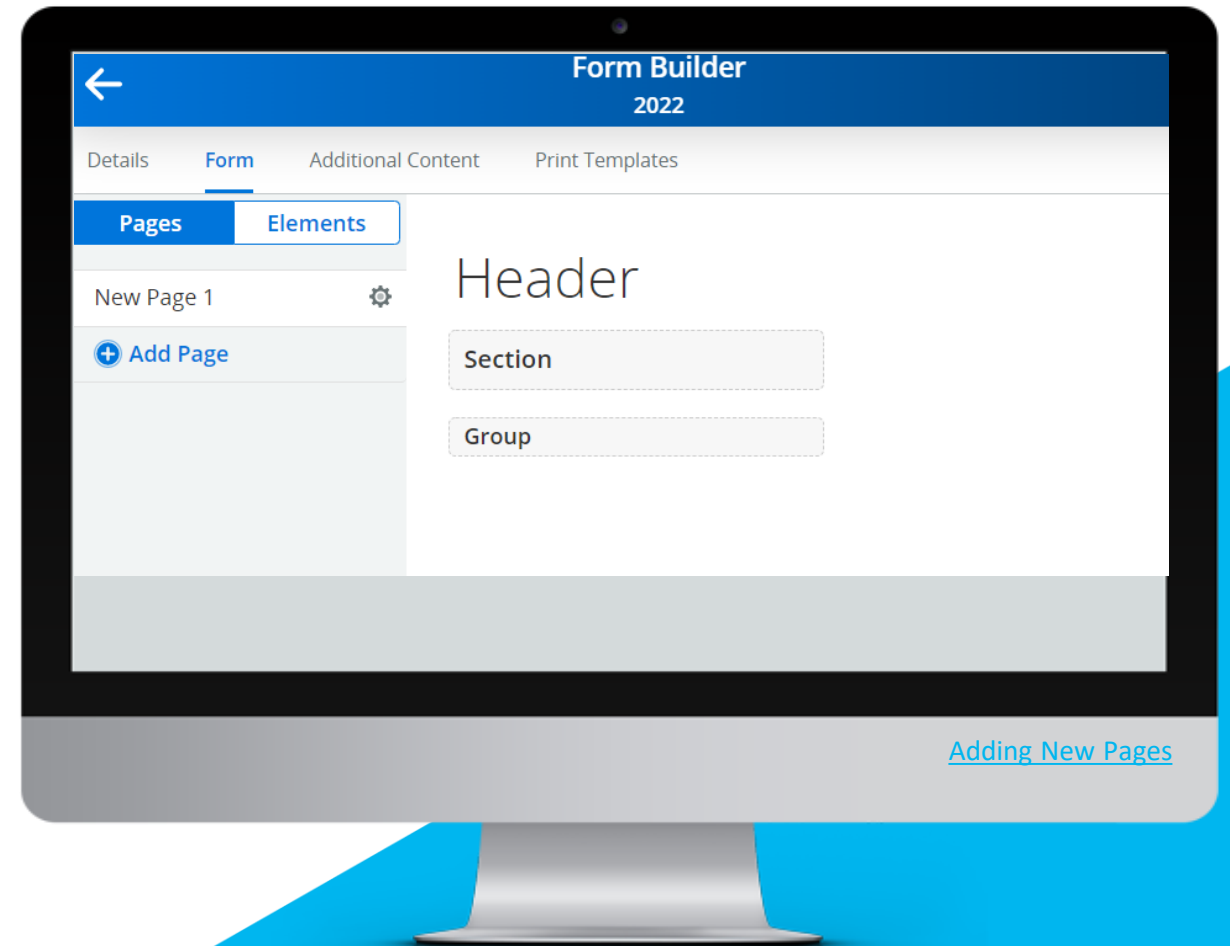


# Revision #3: Adding New Pages

Add 3 new pages and name them in this order; Document Upload, Agreements, Signature

Configuration > Form Builder > choose form > Form tab > Click Add Page

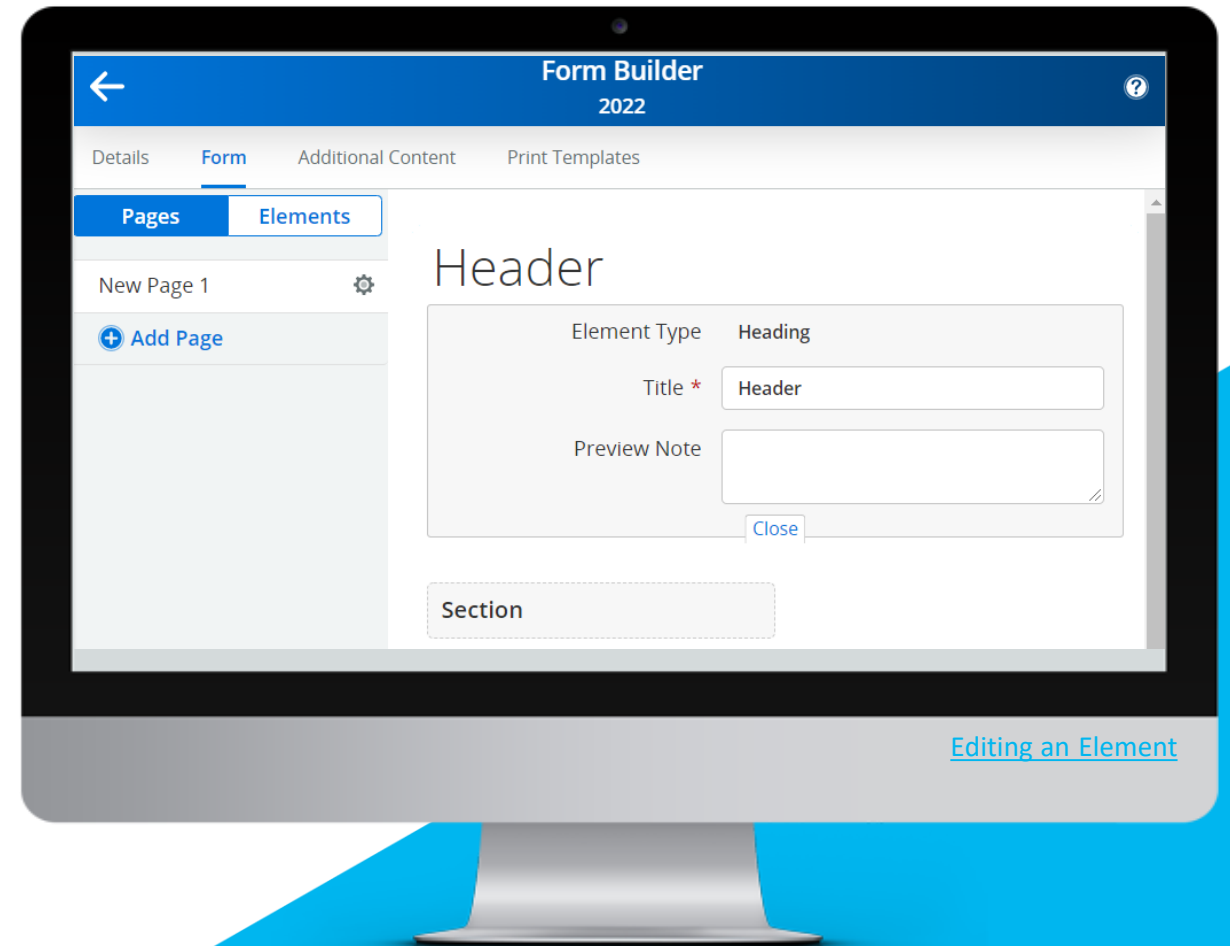
Click Gear icon next to the New pages > Navigation Label



# Revision #4: Editing Headers

On the Student Information page change the header to Student Information

Configuration > Form Builder > choose form > Form tab > Click on Student Information page > Hover over Header > click on Pencil to edit > Title

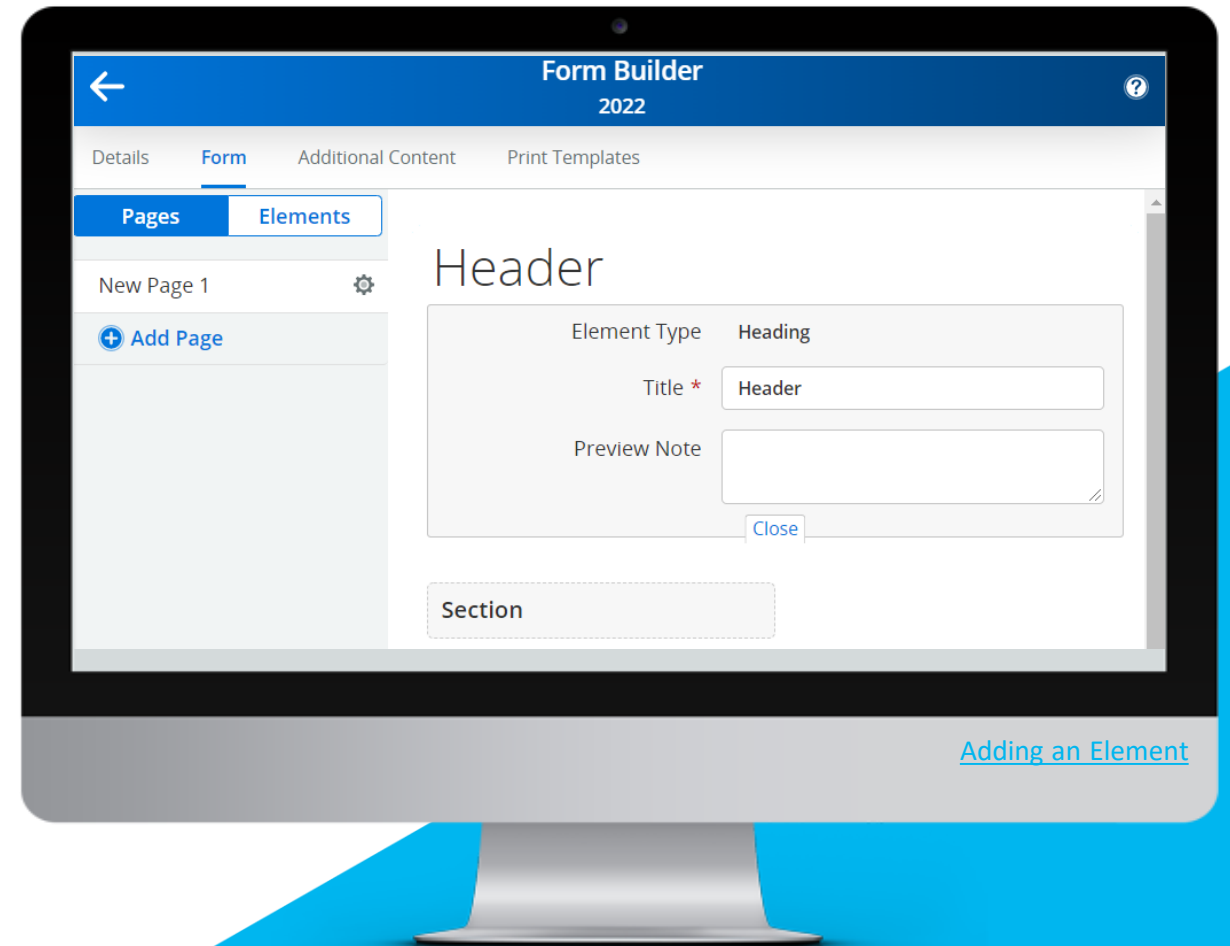


# Revision #5: Adding New Fields

On the Student Information page under group add the following fields

- Students First Name (required)
- Students Middle Name (optional)
- Students Last Name (required)

Configuration > Form Builder > choose form > Form tab > Click on Student Information page > Elements > choose the appropriate element for the questions (text element)

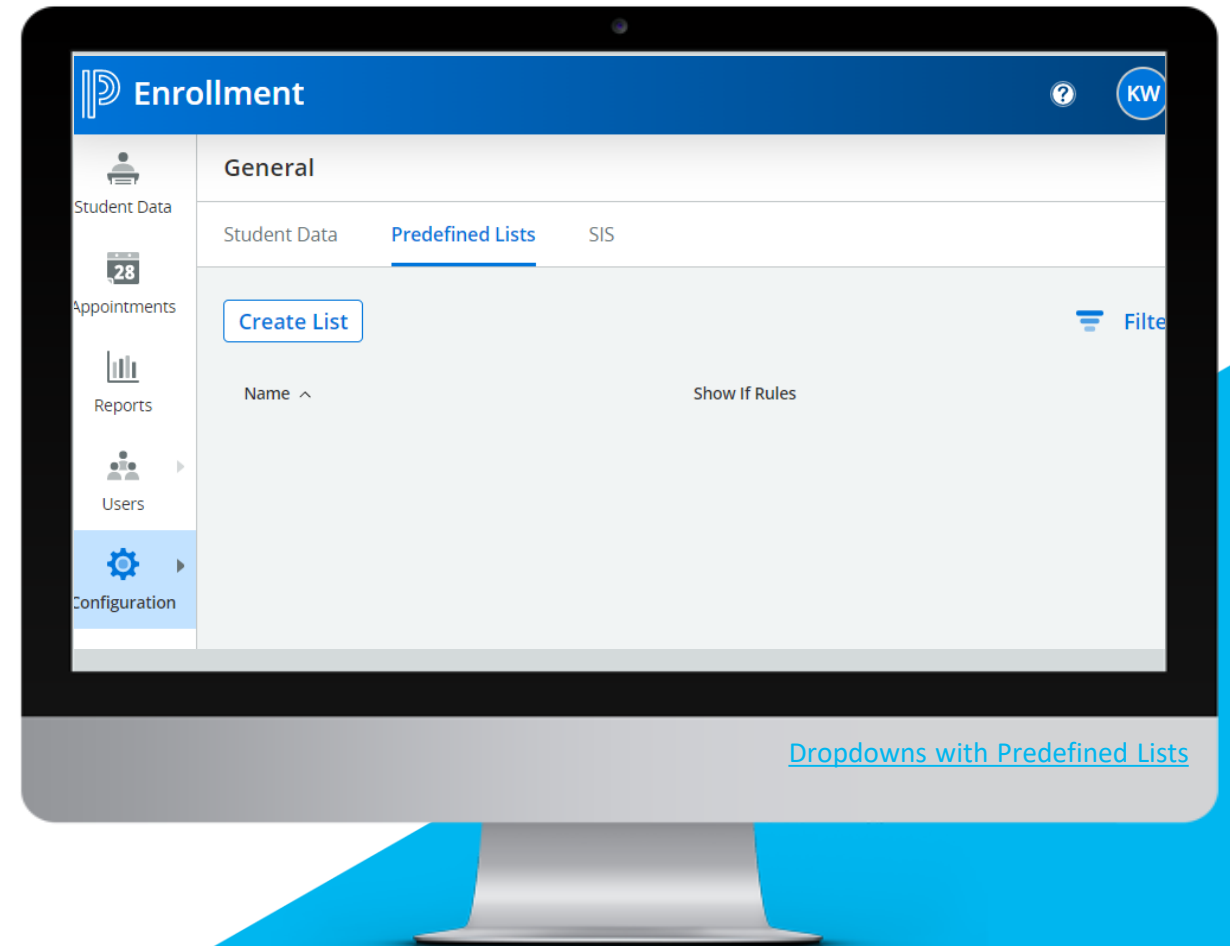


# Revision #6: Adding a dropdown field

On the Student Information page under the Students Last Name field add a field for gender with the following options: Female, Male, X

Configuration > Form Builder > choose form > Form Tab > Click on Student Information page > Elements > Click/Drag Dropdown

Form Builder > General > Predefined Lists > Create List

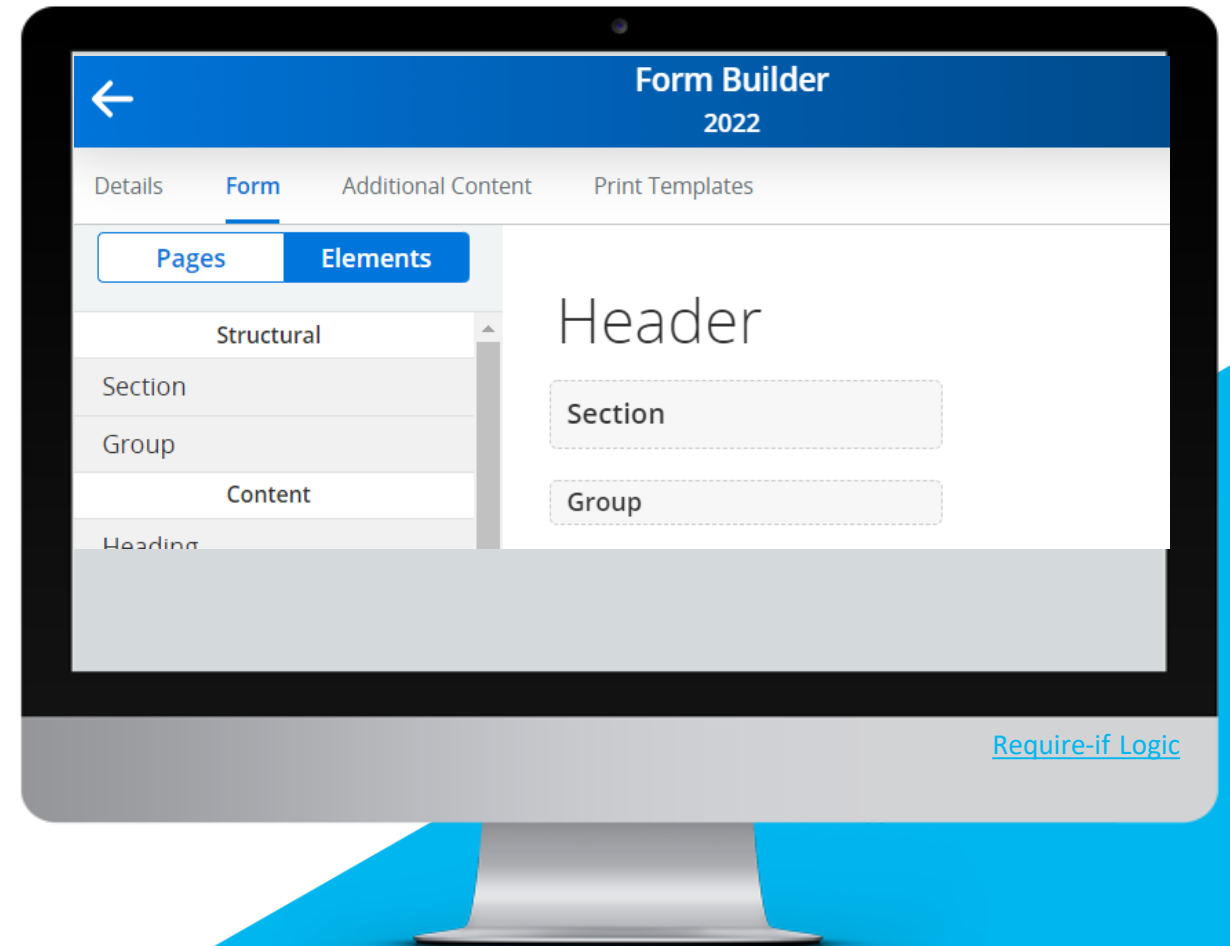


# Revision #7: Adding a new group

On the Student Information page after the gender field add a new group with the following fields: Grade (K-12) and School (school a, school b, school c)

Configuration > Form Builder > choose form > Form Tab > Click on Student Information page > Elements > Click/Drag Dropdown

Form Builder > General > Predefined Lists > Create List

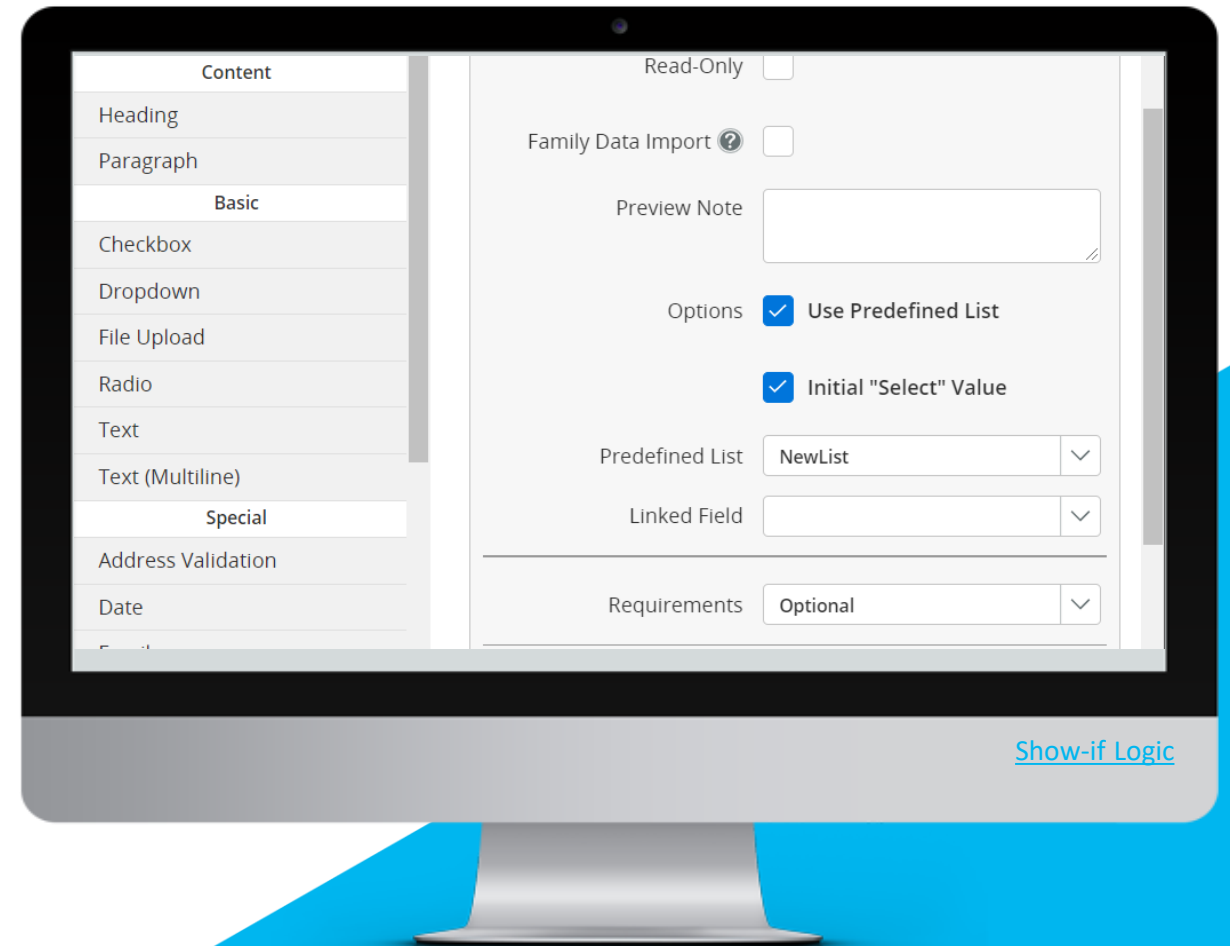


# Revision #8: Adding Show-if logic to a drop down

For the school field on the Student Information page make it so the schools only show as follows: School A (K-5), School B (6-8), School C (9-12)

Configuration > Form Builder > choose form > Form Tab > Click on Student Information page > Elements > Click/Drag Dropdown

Form Builder > General > Predefined Lists > Create List



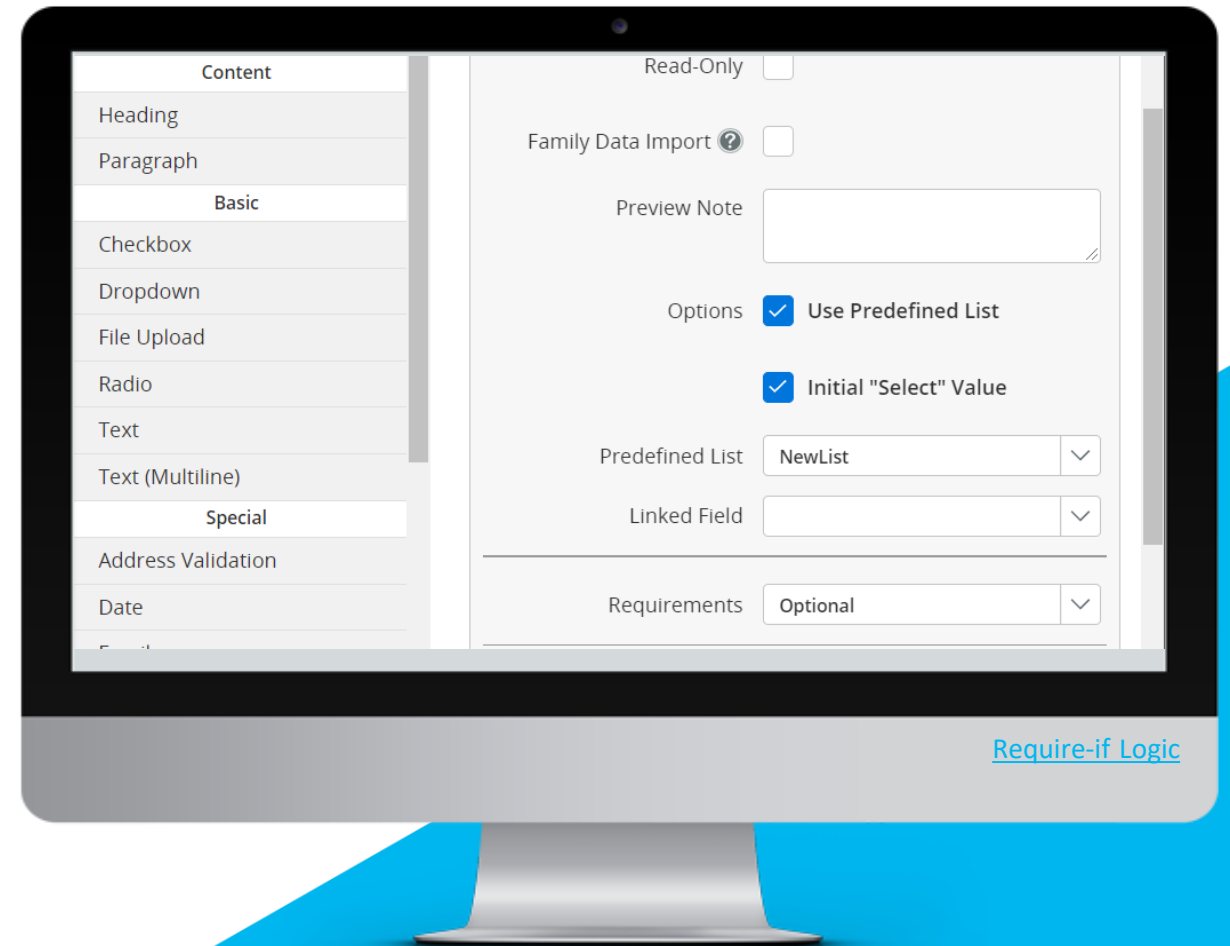


# Revision #9: Adding Require-if Logic to a Field

Add a checkbox under the Students Middle Name field and label it “No Middle Name”. Make the Middle name field only required when the checkbox is not checked

Configuration > Form Builder > choose form > Form Tab > Click on Student Information page > Elements > Click/Drag the checkbox to the appropriate place

Hover over Students Middle Name and click pencil icon > Click Requirements > Choose require if > click add rules > Add in logic

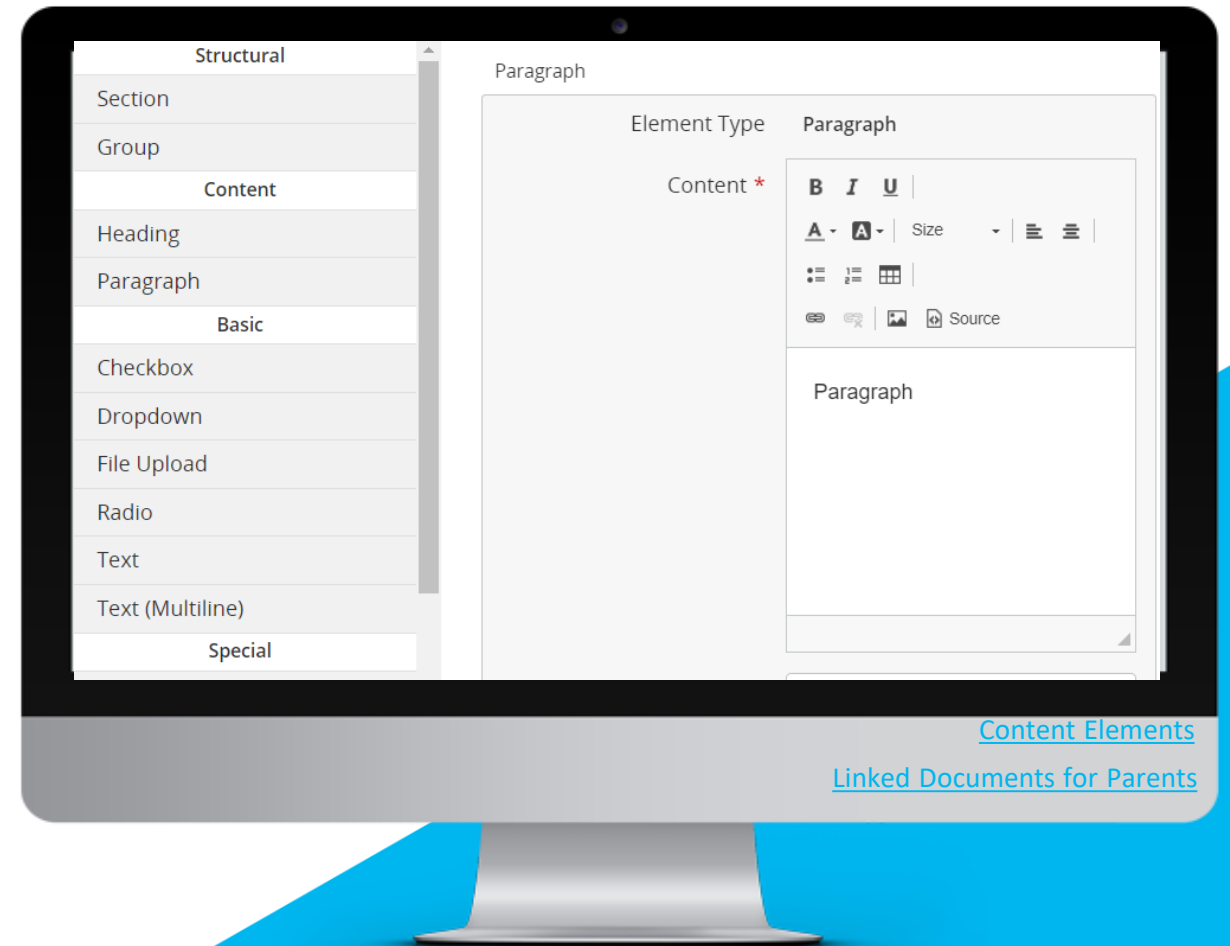


# Revision #10: Adding a Paragraph Element

On the Document Upload Page add a paragraph field with the following:  
Below please provide the following documentation for your student. Below is a help guide for uploading documents to this page.

Configuration > Form Builder > choose form > Form Tab > Click on Student Information page > Elements > Click/Drag Checkbox to appropriate place

Hover over Students Middle Name field and click pencil icon > Click Requirements > Choose require if > click add rules > Add in logic

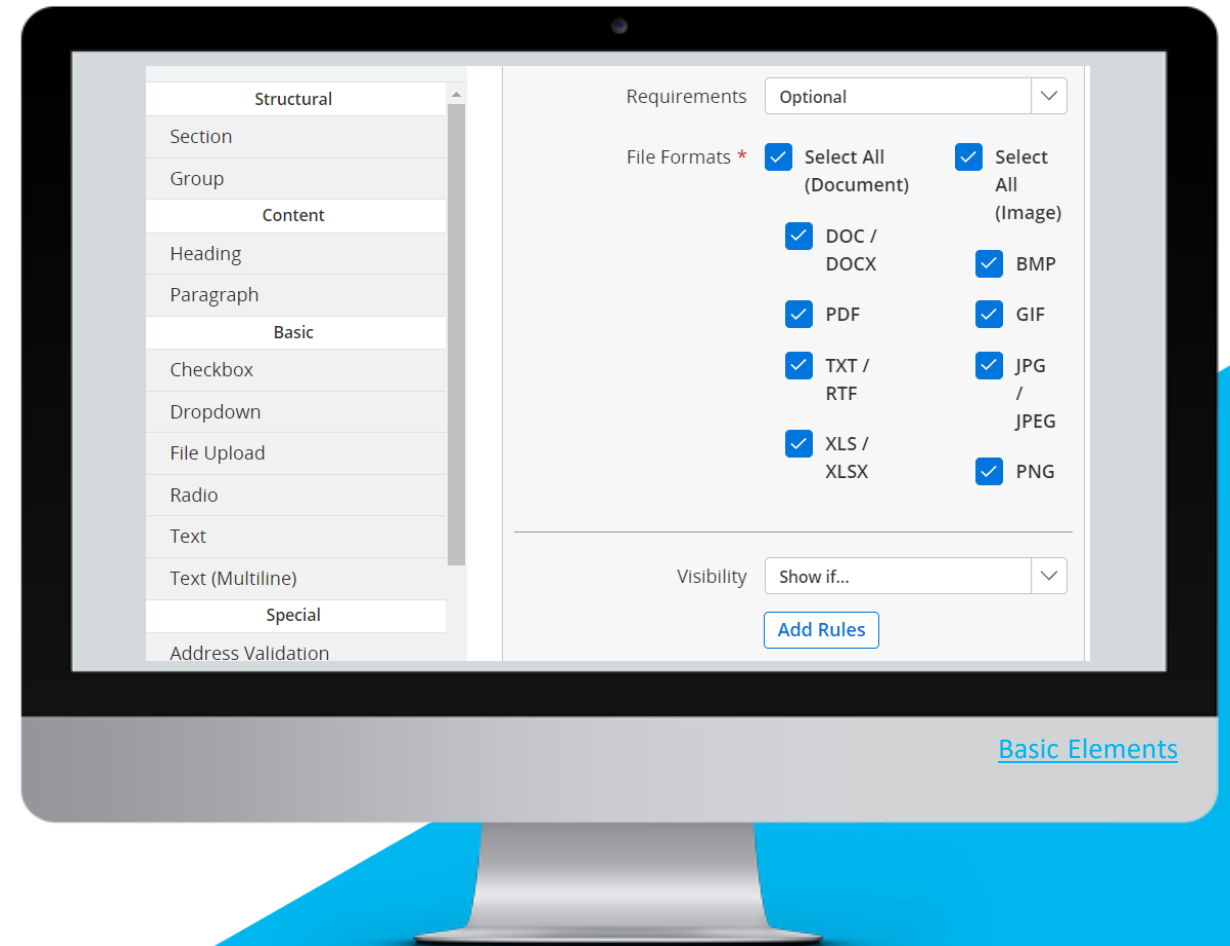


# Revision #11: File Upload Elements

On the Document Uploads Page add 2 file upload fields labeled Birth Certificate and Proof of Vaccination (K)

Configuration > Form Builder > choose form > Form Tab > Click on Student Information page > Elements > Click/Drag element to appropriate place

Hover over Proof of Vaccination > Click the Pencil > Click Visibility and change to Show if > Click Add Rules > Add in Logic

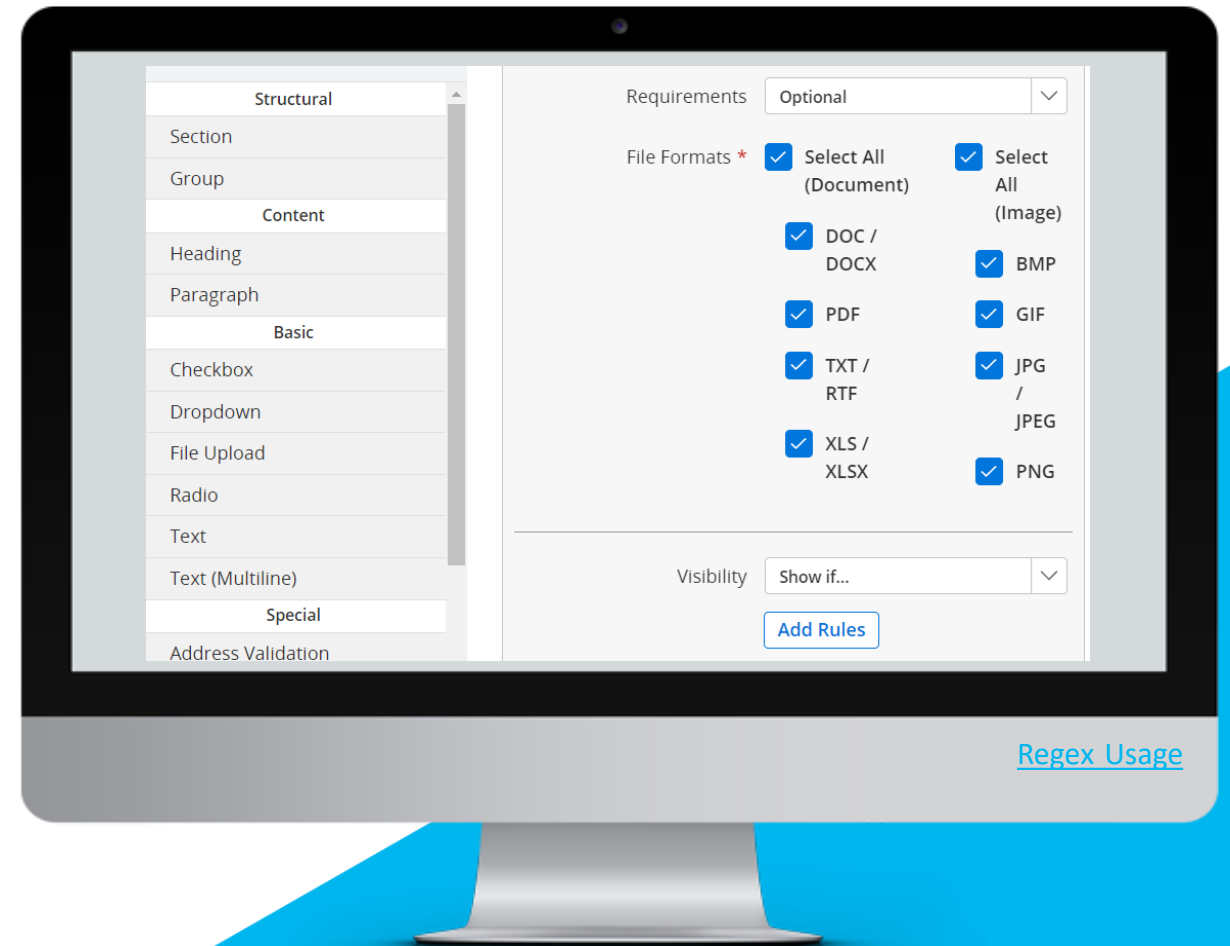


# Revision #12: Regex on Fields

On the Student Information page add a phone number field with the required formatting being xxx-xxx-xxxx

Configuration > Form Builder > choose form > Form tab > click on appropriate page > Elements > click/drag either the phone or the text element

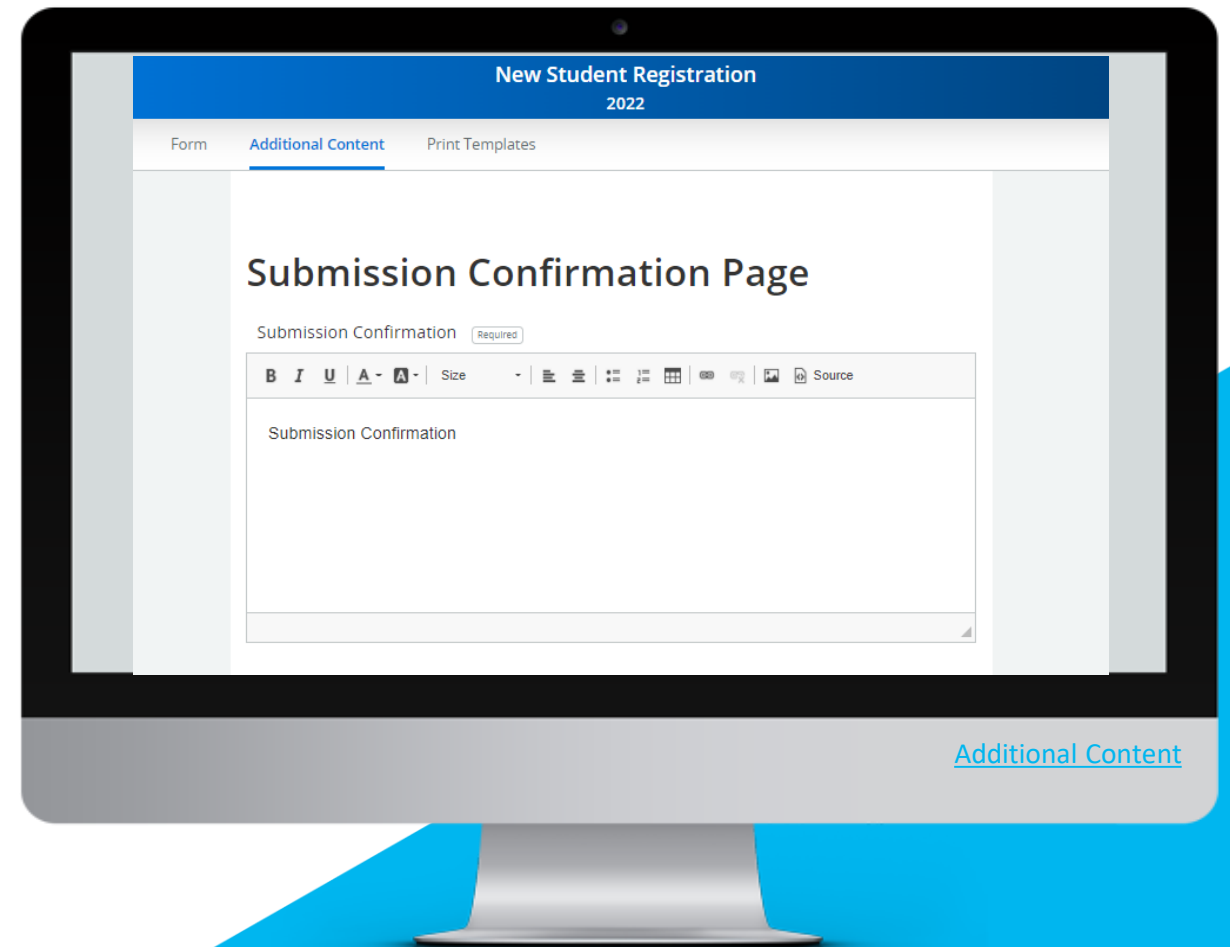
If text hover over it > click pencil icon > check custom validation > add in regex and message



# Revision #13: Additional Content

On the Submission Confirmation Page add in the following text. “Thank you for submitting \_\_\_\_\_’s form. \_\_\_\_\_ will review the form and let you know if anything additional is needed. Below are the next steps that you can take in the meantime.

Configuration > Form Builder > choose form > Additional Content tab > Submission Confirmation Page





# Resources

Help Guide & Community

# Resources

Help Guide	Community
<a href="#">Form Builder Best Practices</a>	<a href="#">Form Builder - Access</a>
<a href="#">All about Pages</a>	<a href="#">Form Builder – Best Practice</a>
<a href="#">All about Elements</a>	<a href="#">Form Builder – Tips and Tricks</a>
<a href="#">Element Palette</a>	<a href="#">Form Builder – Form Name</a>
	<a href="#">Form Builder - Pages</a>
<a href="#">Form Logic</a>	<a href="#">Form Builder – Element Properties</a>
<a href="#">Regex</a>	<a href="#">Form Builder – Element Palette</a>
<a href="#">Predefined Lists</a>	<a href="#">Form Builder - Elements</a>
<a href="#">Additional Content</a>	<a href="#">Form Builder – Predefined Lists</a>
<a href="#">Translations</a>	<a href="#">Form Builder – Form Structure</a>
<a href="#">Print Templates</a>	<a href="#">Form Builder – Additional Content</a>
<a href="#">Files (linking documents in forms)</a>	<a href="#">Form Builder - Rules</a>
<a href="#">Preview</a>	<a href="#">Form Builder – Form Errors</a>
<a href="#">Form Errors</a>	<a href="#">Form Builder – Publishing Your Forms</a>
<a href="#">Publishing</a>	<a href="#">Self-Service Capability Matrix</a>

# Questions



# Upcoming Events & Webinars

# Upcoming Events

Enrollment Office Hours

Wednesdays @ 11am ET / 8am PT

<https://help.powerschool.com/t5/Enrollment-Office-Hours-and/Register-Now-for-PowerSchool-Enrollment-Ask-the-Experts-2023/ta-p/453326>

\*Recordings found here

# Upcoming Webinars

<https://help.powerschool.com/t5/Enrollment-Office-Hours-and/Register-Now-for-Enrollment-PowerUps-2023/ta-p/453567>

**Workspace Configuration** – During this session, we will cover how to create, edit and implement filters, views, tags, student record views, etc.

Feb 14th

**Delivery** – Come join us in learning how to deliver students (regardless of which SIS you have), and troubleshooting any errors to ensure successful delivery. As well as some PowerSchool SIS-specific integrations at the end.

Mar 14

**Record Management** -- Come learn about the different tools you can use to help you and your administrators manage records and assist families in submitting materials.

Apr 18th

