

Custom Tab Data

Custom tabs: Custom tabs appear as their own tabs in a Course, Teacher or Student Record. You can have up to 10 Custom tabs per Course, Teacher or Student.

Custom tabs pull information from specially created Custom Lists, Custom Codes or Custom Fields. Custom tabs can also pull data from other Details fields such as Contact information for students. This allows you to compile new information with existing information in a record.

Multi-Data tabs: Multi-Data tabs appear under one tab in either Course, Teacher or Student Details. On that tab, up to 5 Multi-Data tabs per student and 2 multi-data tabs per Teacher or Course will appear.

Multi-Data tabs pull information from specially created Custom Lists (the same ones used for Custom tabs). They do not, however, pull from Custom Codes or Fields. Multi-Data tabs enable you to create new fields that will allow such data entry as Dates, Text, Phone numbers, Numeric and Boolean.

Examples of the kind of information that can be entered for Custom or Multi-Data tabs are SAT scores, Counselor visits, Classroom Objectives for students, and for teachers, you could keep track of courses they may take in relation to their job.

Creating Custom Tab data

There are several steps involved in creating a Custom tab. The steps below walk you through creating Custom Fields, Codes and Lists, and the creation of the Custom tab.

Step I - Create a Custom Field:

1. Start School Setup.
2. Select Custom Tabs and double-click on either Custom Course Fields, Custom Teacher Fields or Custom Student Fields.
3. In the Field Name column, type a name up to 29 characters.
4. Choose a type from the popup menu in the Type column. You can choose text, numeric, date, phone number or boolean. If the type is numeric, type the number of decimals the field can have, to a maximum of 3.
5. Select the Custom tab template which will display that field in Details.
6. Repeat steps 3 - 5 for each additional field.
7. Click OK.

Step II - Create a Custom Code:

1. Start School Setup.
2. Select Custom Tabs and double-click on either Custom Course Codes, Custom Teacher Codes, or Custom Student Codes.
3. To change the title of a code, choose the code from the popup menu, click Edit Title, type a new name and click OK.
4. To add a code to the Custom code list, click in the Short Code or Description field in the line below the code N/A. Type a new Code and Description. Press Enter to enter a new code and description.
5. After entering all codes, select a code to be the default code that will be automatically assigned when this Code is assigned to a student.
6. Select the Custom Tab template that will be able to use that Custom Code list.
7. Repeat steps 3 - 6 for each list of Custom Codes.
8. Click OK.

Step III - Create a Custom List:

1. Start School Setup.
2. Select Custom Tabs and double-click Custom Course Lists, Custom Teacher Lists or Custom Student Lists.
3. To change the title of a list, choose the list from the popup menu, click Edit Title, type a new name and then click OK.
4. To add a list item, click in the Short Code or Description field in the line below the code N/A. Type a new Code and Description. Press Enter to enter a new code and description.
5. Select an item in the list to be the default that will display when a new student is entered in the database.
6. Select the Custom Tab templates that can use that list.
7. Repeat steps 3-6 for each list of items.
6. Click OK.

For a Custom tab to appear in the Details module, you must define which fields, codes, and list items it will contain. You can also name these tabs to easily identify them in the student window.

Step IV - Create a Custom Tab:

1. Start School Setup.
2. From the Tabs menu, choose Custom Tab Designer, then choose Courses, Teachers, or Students.
3. From the popup menu at the top of the dialog box, choose the tab you want to define.
4. To change the tab title, click Edit Title and type the new title.
5. To include it in a District Extract export, select District Owned, click OK.
6. For each field you want to appear on the tab, choose either a field or list from the Type popup menus. After you have put either a field or list on a tab, it is dimmed and cannot be used again on the same tab.
7. If Custom Field or List item does not appear in the popup menu, you did not select this numbered tab as one that can use that item. See step 5 or 6 in the setting up of Fields or Lists above.
8. At the bottom of the dialog box, select each Custom Code you want to appear on the tab.
9. If one of the codes you created does not appear in this dialog box, you did not select the current tab as a tab the Custom code could use. See step 6 above in the setting up of Custom Code.
10. Click OK.
11. Exit from School Setup.

As you exit from the School Setup module the program will update the database with the information you have entered in creating a Custom Tab.

Creating Multi-Data tabs

There are several steps involved in creating a Multi-Data tab. You need to set up your Custom Lists and then create the Multi-Data tab.

Step I - Create a Custom List:

1. Start School Setup.
2. Select Custom Tabs and double-click Custom Course Lists, Custom Teacher Lists or Custom Student Lists.
3. To change the title of a list, choose the list from the popup menu, click Edit Title and type a new name, then click OK.
4. To add a list item, click in the Short Code or Description field in the line below the code N/A. Type a new Code and Description. Press Enter to enter a new code.
5. Select an item in the list to be the default that will display when a new student is entered in the database.
6. Repeat steps 3 - 5 for each list of items.
7. Click OK.

For a Multi-Data tab to appear in the Details module, you must define which list items it will contain and any other information you would like to enter. You can also name these tabs to easily identify them in the Multi-Data window.

Step II - Create the Multi-Data tab:

1. Start School Setup.
2. From the Tabs menu, select Multi-Data Tab Designer, then choose Courses, Teachers, or Students.
3. From the popup menu at the top of the dialog box, choose the tab you want to define.
4. To change the tab title, click Edit Title and type the new title.
5. To include the tab in a District Extract export, select District Owned.
6. Click OK.
7. To add a new field to the tab click Add Item.
8. Choose whether the field is to be a Text, Numeric, Date, Phone, Boolean or List field.
9. If you choose a Text, Numeric, Date or Boolean Field give the Field Name a title - this title will appear in the tab.
10. If you choose a List field, give the Field Name a title and also choose from the List column a Custom List that you wish to use on this tab.
11. Choose which of the items you have added that will appear on a Summary window and which ones will appear on the Detail window on the Multi-data Tab. You can choose up to 5 of the items to appear on the Summary window.
12. Repeat steps 3 - 11 for each Multi-Data tab you create.
13. Click OK.
14. Exit from School Setup.

As you exit from the School Setup module the program will update the database with the information you have entered in creating a Multi-Data tab.

You can now enter the information for the students in Details – Students

Setting Access to Custom or Multi-data tabs

After creating the Custom or Multi-Data tabs, you can set permissions for users to access specific tabs only. For example, you may want a user to have access only to Custom Tab 5 and no access to any of the other Custom tabs.

To assign access levels you will need to do the following:

1. Start School Setup.
2. Select Passwords and double-click on System Passwords.
3. Highlight the user to whom you wish to assign access to.
4. From the list of modules scroll down to either Courses, Students or Teachers.
5. Look for the Custom or Multi-Data tab you need this user to have access to and give them Edit Access.
6. If you do not want them to have access to the other tabs you can give them an access level of None.
7. Click OK.

The next time the user accesses Win School they will only see the tabs you have given them access to.