

User-defined Fields

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Family and Student User-defined Fields (UDF), 5 of each, are custom fields you create that allow you to capture and store additional important information for your organization. These are a few examples:

- Students' preferred pronouns
- Coupon numbers
- Membership numbers

**Expand/Collapse
All**

Create User-Defined Fields

The *Family* and *Student* User-defined Fields are created and edited from the *Gear (icon) > Settings > General > User-defined Fields (left menu)*.

Online Registration Form Settings

On your **Online Registration** form, you can set a User-defined Field to:

- *Hidden* (field doesn't show on the registration form).
- *Optional* (field shows but the parent can leave it blank).
- *Required* (parent must provide a response).

These settings are accessed from the *Gear (icon) > Settings > Online Registration > Field Options/Labels* in the *Family Information and Student Information* sections.

Parent Portal Settings

In the **Parent Portal**, you can set a User-defined Field to:

- *Hidden* (the field will not appear in the portal)
- *View Only* (the field will be visible in the portal but the parent cannot edit it)
- *Can Update - Optional* (field shows and the parent has the option to edit it)
- *Can Update - Required* (parent must complete the field).

These settings are accessed from the *Gear (icon) > Settings > Parent Portal > Settings (tab)*.

In the Parent Portal, making a User-defined Field required will notify the parent that they need to give you more information. A notification badge will appear in their portal indicating that additional information has been requested. **Note: It does not prevent the parent from enrolling their student(s) in classes.**

Locate UDF Answers

Location in a Family Record - Misc Tab

Answers to the Family User-defined Fields are saved and stored on the *Misc* tab of the *Family* record. These fields will also appear in several searches and reports throughout Jackrabbit.

Location in a Student Record - Misc Tab

Report on User-defined Fields

All Families List

Go to the *Families (menu)* > *All Families* to report on Family User-defined Fields. Filter for *Family User-Defined Fields*, enter the information in the selected field, click *Apply*, and the filtered list will populate on the page.

To display the column with the user-defined field information, use the column menu and select the specific User-defined field column you would like to see on the list.

All Students List

Go to the *Students (menu)* > *All Students* to generate a list of Student User-defined Fields. Filter for *User-Defined Fields*, enter the information in the selected field, click *Apply*, and the filtered list will populate on the page.

To display the column with the user-defined field information, use the column menu and select the specific User-defined field column you would like to see on the list.

Parent Portal Log Report

The **Parent Portal Log**, located in *Reports (menu)* > *Find Reports* > *Families/Students* > *Families (tab)* can be used to search for updates to User-defined Fields that parents have made in their portals.

From the *Filter Option* criteria drop-down, select **User Defined Field Changes** and select a date or date range to view the activity for. Click *Submit*.

Sample Parent Portal Log Results

Clear Answers in User-defined Fields

A User ID, with the required permissions, can clear Family and Student User-defined Fields. This is helpful when starting a new session that requires updated information.

There are two User ID permissions required:

- In the *Families* Category of User Permissions, *Clear Family User-defined Fields*
- In the *Students* Category of User Permissions, *Clear Student User-defined Fields*

To clear all User-defined fields go to *Families (menu) > All Families* or *Students (menu) > All Students*, and leave the 1st column unchecked to select all. Click the mass actions (icon) and select *Clear UDF Answers*. In the pop-up window, toggle the user-defined fields you want to clear and click *Clear*.

Note: Use the checkboxes in the 1st column of the grid if you want to select a group of families or students to clear their User-defined field answers only.
