SchoolInsight Admin Guide

Basic Setup



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1 Basic Setup Introduction

Welcome to the Basic Setup Admin Guide. This guide will explain how to setup SchoolInsight for your school. It will focus on the step-by step instructions. Just read and follow the directions, in order, and you will set up SchoolInsight successfully.

1.1 Audience

This guide is written for the SchoolInsight admin. This is someone who is responsible for setting up SchoolInsight and will also do the occasional "care and feeding" of SchoolInsight (i.e. adding new students when they enroll). Often this is a member of the main office staff or the technology coordinator at a school.

School administration – principals, assistant principals, etc. are referred to as "principals" within SchoolInsight.

2 Basic Setup Overview

Here's an overview of the steps for setting up SchoolInsight:

<u>Choose an admin</u>

This person will do the SchoolInsight setup. If you have been designated as the SchoolInsight admin, please email your name/email address to SchoolInsight support (<u>support@common-goal.</u> <u>com</u>) if you have not already done so.

• <u>Enter basic information</u> The admin will need to manually enter the following information:

Other Admins Instructors Academic Years Grading Periods Grading Scales

Enter students

There are several choices to get students into SchoolInsight:

Import the Students

If you have the student list in an electronic file, this is the best option. You can import the students into SchoolInsight without the effort of manual entry.

• The admin manually enters students

The admin can manually type students into the system. This is time/effort intensive, but can be done in a few hours for a school with several hundred students.

• The instructors enter students

The permissions can be set to allow instructors to create/modify students. This works nicely for small schools (5 or fewer teachers). Avoid this approach in larger environments because of the teachers will create duplicates, misspellings, varying capitalization, etc. that the admin will need to fix afterwards.

- <u>Enter Courses/Classes/Rosters</u> There are several options to enter the classes taught at the school.
 - The admin manually creates courses/classes/rosters

This is typically done if the school also uses SchoolInsight for school-wide attendance or report cards. This ensures that the class names are consistent with the reports sent to parents, and that they are scheduled during the correct period. The admin will first create "Courses" and then "Classes" (more details on this later).

<u>The teachers can create their own classes/rosters</u>

The permissions can be set to allow instructors to create their own classes. This makes the most sense when there are a large number of teachers and the report cards are generated using a system other than SchoolInsight. Any minor inconsistencies in the data will be acceptable in this situation.

- <u>Distribute the Gradebook User's Guide to Teachers</u> SchoolInsight is very easy to use. Many teachers will be able to use it "problem free" once they are provided with a login and documentation. Look for the User's Guide under the "User Guides" link.
- <u>Give a short training to Instructors (if necessary)</u> While many teachers can use SchoolInsight without additional assistance, some teachers will be more comfortable once they have had an "official" training session.

To support this process, a SchoolInsight support person can go through an electronic "train the trainer" session. We also supply documents to use when running a teacher training class (preparation and agenda documents). Look for these under the "User Guides" link. A support person can also be on-call or on-line via instant messenger during the session to answer any difficult or advanced questions. Please contact support@common-goal.com to schedule.

Enable Parent Access

After the teachers have been using SchoolInsight for a few weeks, it is a good time to enable parent access. This provides the instructors an opportunity to get comfortable with the system before the parents can inspect the data (and teachers feel like they're "on the spot"). You can also have a second training that covers the communication aspects of SchoolInsight.

3 Login

The first step is to login to SchoolInsight. Once you have entered the Internet:

· Go to www.teacherease.com

The home page describes the basic features of SchoolInsight. Feel free to browse the site. Before you can set up or use any of these features, you will need to login:

- Type in your email address and password. Typically you will use the email address and password supplied by the school.
- Click "Log in" to access your school's data.

	AMON GO	EMAIL ADDRESS	Forgot Password?		
Home	Products	Company	Contact Us		

Once you've logged in from the site's main page, you can log out and log back in from within the program.

Email Address	
example@te.com	
Password	
\square Save your email address on this computer [?]	
Log In S Forgot your password?	-

- Choose to have your email address remembered on the logged in computer.
- If you ever forget your password, click "Forgot your password?". This will allow SchoolInsight to automatically email your password to you.

3.1 Login History

View the login history for admins, instructors, students and contacts. All successful and failed logins are shown with the corresponding date, time and IP address. **Note:** Times are shown using Central Standard Time.

Date	Time	IP Address	Successful
Friday 9/16/2011	1:24pm	50.44.13.72	Yes
Friday 9/9/2011	3:10pm	50.44.10.48	Yes
Friday 9/9/2011	3:01pm	50.44.10.48	Yes
Monday 8/29/2011	11:43am	50.44.10.48	Yes
Monday 8/29/2011	11:43am	50.44.10.48	No
Wednesday 8/24/2011	1:22pm	50.44.11.10	Yes
Monday 8/22/2011	12:53pm	50.44.11.10	Yes
Monday 8/22/2011	12:53pm	50.44.11.10	No
Wednesday 8/3/2011	3:16pm	66.92.129.24	Yes
Wednesday 5/18/2011	11:33am	50.103.22.7	Yes
Monday 5/16/2011	11:03am	50.44.8.109	Yes
Friday 5/6/2011	10:00am	50.103.29.123	Yes
Thursday 5/5/2011	10:57am	50.103.27.155	Yes
Tuesday 4/12/2011	4:18pm	66.92.129.24	Yes
Successful Logins: 12			

View Admin login history at Main > Admins > Logins.

View Instructor login history at Main > Instructors > Logins.

View Student login history at Main > Students-Single View > Logins, in the "Basic Info" section under the "General" tab or in the "Student Properties" section under the "Contacts/Family" tab.

Student login history can also be viewed at Main > Students-Multi View > Contacts/Family in the "Student Properties" section for the chosen student.

View Contact login history at Main > Students-Single View in the "Contact Properties" section under the "Contacts/Family" tab.

Contact login history can also be viewed at Main > Students-Multi View > Contacts/Family in the "Contact Properties" section for the chosen contact.

Student and contact login information can also be viewed at Main > Email Addresses > Logins.

4 Account Profile

View/modify your account information. Change your name, email address, password and other account preferences.

The first time you login, you will be asked to change your password. This is to prompt you to change from the SchoolInsight assigned password. You will automatically go to the "Update Account" page. Choose a password that is easy for you to remember, but hard for someone else to guess. There are no limitations on the characters used for passwords. Passwords are case sensitive.

	Accou	nt Pro	file			-
	Info	Passv	vord	Preferences		
	Title:					
	First Na	ame:	Jay			
	Last Name:		Birdm	an		
	Email Address:		jaybird	@jb.com		
	Last Lo	ogin:	Wedne	esday 8/28/2013 1	:12pm CST <u>(logins)</u>	
	Edit B	Back				
•						

Main > Account Profile

Click the "logins" link to view a history of your login attempts. All successful and failed logins are shown with the corresponding date, time and IP address. **Note:** Times are shown using Central Standard Time.

Use the tabs at the top to view corresponding account details.

<u>Edit</u>

Modify account details. Scroll through available tabs to modify account details.

Note: The standard browsing mode allows you to browse SchoolInsight securely, with the best performance. Set "Browse Securely" to "Yes" under the "Preferences" tab if you want to encrypt all the pages with SSL (secure socket layer). This will be slightly slower but even more secure.

Note: If you forget your password, click on "Forgot your password?" on the "Login" page and it will be emailed to you.

14 Admin Basic Setup

5 Admin Main

Once you have logged in, you'll find yourself on the "Admin Main" page. This page allows easy access to SchoolInsight functionality.

Admins are authorized to set up school information in SchoolInsight. This includes entering all the information necessary for the school to use SchoolInsight: Instructors, Students, Courses, etc.

To navigate the site, either use the dropdown menus or click the links. Each is organized the same and contain the same functionality access. The Basic Setup, Yearly Setup, Modules, Tools and Misc tabs are organized the same as the links on the Main page.

Functionality has been grouped into common areas for ease of use. **Note:** Access to sections under "Modules" and "Tools" depend on which portions of SchoolInsightyour school has purchased.

To get back to "Admin Main" at any time, go to the top of the page and click on "Main." These two names are synonymous, and we will call it "Main" page throughout the rest of the guide.

Throughout this guide we'll use the following convention to guide you through the appropriate web pages.

Main > Admins

This notation means start at the "Main" page and click on the "Admins" link.

	Main	Basic Setup	Yearly Setup	Modules	Tools	Misc	Help	Logout 🔺
	Admin Main	ı						
	Basic Setup	Yearly Setup	M	odules	т	Tools	Misc	
	Admins	Academic Yea	irs <u>Gr</u>	ade Reporting	E	Reports	Help/T	raining/Videos
	Instructors	Calendars	At	tendance	Ē	Email/Announcem	ents Subso	riptions
	Employees	Students - Sin	gle View So	heduling	L	etter Templates	Accou	int Profile
	Options	Students - Mul	Iti View Tu	ition/Fees	<u>e</u>	Groups	Switcl	h Role
	Import/Export	Grading Period	ds Lu	inch	Ξ	Digital Lockers		
	What's New	Grading Scale	<u>s Di</u>	scipline	E	Bus Routes		
		Course Catalo	a Lo	ngitudinal Data	Analysis T	Tutoring/Activity L	oqs	
		Classes/Section	ons <u>He</u>	alth Records	L	ockers		
		Email Address	ses <u>St</u>	andards/Plannin	ng <u>C</u>	Online Registratio	<u>n</u>	-
4								

What's New? is updated after every new release. View details to see what's changed.

The Help tab gives you access to context sensitive online help, online training, videos, email support and feedback.

Help	Logout					
Online Help						
Online Training						
Videos	Videos					
Support						
Feedback						
Lincoln Sch	ool [change]					
Auto Logout: 1h 05m						

Main > Students - Single View

Help Logout

- Control your session timer: Click on any page to reset the timer back to the default minutes. **Note:** Minutes can be set at <u>Main > Account Profile</u>.

- Navigation breadcrumbs are provided to help you keep track of which page you're on.

- If you have multiple schools using SchoolInsight, quickly switch between schools by clicking **[change]** to the right of the school name. This generates a dropdown list of your schools. Simply click a school name and you'll automatically be switched to that school. Additionally, if you <u>"Goto" an</u> <u>Instructor</u>, the same option exists to switch between instructors at a school.

You can access SchoolInsight from anywhere via the Internet. This means you can use it from school, home, or anywhere you have an Internet connection. You can also use a Macintosh, PC, or other computer – as long as it's connected to the Internet.

The first step in using SchoolInsight is to set up the people involved with the system. This includes a number of roles:

- Admins
- Instructors
- Students

6 Admins

Admins are authorized to set up school information in SchoolInsight. This includes entering all the information necessary for the school to use SchoolInsight: instructors, students, classes, etc. **Note:** Admins can view, modify or "goto" different areas based on their permissions. Permissions are initialized by choosing a <u>permission template</u>. Use "<u>Main > Admins > Edit</u>" to modify defaulted permissions for a chosen admin.

Manage your school's admins and permissions.

	Admins							
	School: Lincoln School							
	Name	Email	Login Stats					
	<u>Adam Admin</u> Super User	aa@aa.com	Count:21 Last: 9/6/2011 First : 9/27/2007 Created: 9/27/2007	edit delete logins				
	<u>Thomas Jones</u> Super User	testadmin@ta.com Undeliverable: Address does not exist	Count:1 Last: 9/6/2011 First : 9/6/2011 Created: 1/5/2010	edit delete logins				
	<u>Nancy Nurse</u> Nurse	nn@nn.com	Count:15 Last: 10/28/2009 First : 6/23/2009 Created: 6/23/2009	edit delete logins				
	Total=5	Active=3						
	✓ Hide Inactive Admins							
	Create Admin	Permission Templates Mass Edit	Back		-			
•				•				

Main > Admins

The Admins page shows a list of current admin accounts. Initially, there will probably be one admin account created. If other people will help you setup SchoolInsight, add them too. **Note:** Email addresses resulting in delivery failures are noted in red.

Create Admin

Create new admins or create an admin using an existing employee **Note:** When employee management is enabled, detailed information can be entered while creating new admins. For more details goto <u>Main > Employees</u>.

Permission Templates

Allow/restrict school information that can be viewed or modified by an admin. Manage existing or create new templates, as needed.

Mass Edit

Modify information for many admins at the same time.

<u>Edit</u>

Modify information details for a chosen admin.

<u>Delete</u>

Remove an admin from your school, as needed. Use caution when deleting as this data cannot be recovered. You may want to mark them "inactive" instead. **Note:** Admins may not be able to be deleted if they have certain information associated with them, such as, tutuoring/activity logs, discipline incidents, etc. Mark them "inactive" instead. **Note:** Be careful not to delete **all** admin accounts, as you will be unable to login and setup SchoolInsight. If this were to happen, contact support to get a new account created.

Logins

View a history of successful/failed logins for a chosen admin. For more details see the "Login History" section under "Login".

6.1 Create Admin

Create new admins or create an admin using an existing employee. **Note:** When employee management is enabled, detailed information can be entered while creating new admins. For more details goto <u>Main > Employees</u>.

	Create Admin					
	School: Lincoln School					
	 Create a new emplo Use existing employ 	yee				
	Title:	•				
	*First Name:					
	*Last Name:					
	*Email:					
	*Password:					
	*Confirm Password:					
	*Permission Template:					
	Save Back		•			
4		•				

Main > Admins > Create Admin

Permission Template: Assign an existing permission template to set view/or modify permissions for this admin. For more details on permission templates goto <u>Main > Admins > Permission Templates</u>.

6.2 Edit Admin

Modify details for the chosen Admin. Modify their permissions, when needed. Mark them active/ inactive.

Edit Admin				_			
School: Lincoln Sch	School: Lincoln School						
Title:	Title:						
First Name:	Ada	m					
Last Name:	Adm	in					
Email:	aa@	aa.com					
Password:							
Confirm Password	:						
Active:	Yes	•					
Permission Templa	ate: Si	uper Use	r 💌				
Permission	View	Modify					
Admins	•	•					
Instructors	•		Goto				
Options	•						
Academic Years	•						
Students	•		🗹 Goto				
Grading Periods	~			▼			

Main > Admins > Edit

Email: Update the admins email address. **Note:** If email sent to this address results in a <u>delivery</u> <u>failures</u>, the address will be disabled by SchoolInsight. Update the email address to enable the admin to send/receive emails.

Note: An admin can update their own email address at Main > Update Account.

Note: When employee management is enabled you can also edit employee information for admins here or at <u>Main > Employees > Edit</u>.

6.3 Permission Templates

Permission templates allow/restrict school information that can be viewed or modified by an admin. A permission template must be assigned to each admin when they're created. Initially SchoolInsight will be populated with permission templates for Super User, Principal and Attendance Only.

Admin Permission Template School: Lincoln School Name Super User view refresh Principal view edit delete refresh Attendance Only view edit delete refresh Create Template Back

Main > Admins > Permission Templates

A "Super User" has access to view/modify all school information. "Principals" are admins that can view most school information, with limited access to modify it. "Attendance Only" admins perform only attendance related tasks. **Note:** It is suggested that "Admin/Super User" admins be limited to as few as necessary.

Create Template

Create a new template with customized permissions to meet your school's needs. Examples of potential templates include: Discipline, Lunch, Nurse, etc.

View

View the permissions available for admins using the template.

Edit

Change the permissions allowed for the permission template.

Delete

Delete the permission template.

Refresh

Updates chosen admins with the modified template. This provides a quick way to update many admins without having to do individual edits.

6.3.1 Create Admin Permission Template

SchoolInsight allows you to create new admin permission templates to meet your school's needs. **Note**: The Admin Main page will show only those links for which the admin has permissions.

Main > Admins > Permission Templates > Create Template

Admins may have a need to "Goto" Instructors or Students. When checked, the admin can enter their account as if they are logged in as that person, allowing them to enter/update data as needed.

Save and Refresh will save the new template and assign it to chosen admins.

	Create Admin Permission Template						
	School: Lincoln School						
	Title:						
	Permission	View	Modify				
	Admins						
	Instructors			🗆 Goto			
	Options						
	Academic Years						
	Students			🗖 Goto			
	Grading Periods						
	Grading Scales			Þ	┛		
Ē	Lunch			Enter Only			
	Letter Templates						
	Discipline	•		Create Only			
	Translations						
	Health Records	•					
	Tutoring / Activity Logs						
	Groups	•					
	Digital Lockers						
	Save Save and Ref	resh	Back		-		
4				F	ſ		

7 Instructors

Enter new or view existing instructors in a school. Update instructor information or make them "inactive". View instructor login history, last login date and total number of logins.

	Instructors						
	School: Lincoln School						
	Create Instructor Mass Edit Prin	ter-Friendly Pag	Page Back				
	Name/Email	Options	Modules	Logins	Expires		
	<u>Birdman, Jay</u> jaybird@jb.com	Highly Qualified	Gradebook Lesson Plans	Last: 9/16/2011 Count: 43	1/1/2100	goto edit delete logins	
	Bradley, Brenda bb@te.com	Highly Qualified	Gradebook Lesson Plans	Last: 11/14/2011 Count: 1949	2/10/2099	goto edit delete logins	
	<u>Chase, Brian</u> bc@bc.com		Gradebook Lesson Plans	Last: 8/23/2011 Count: 4	1/1/2100	goto edit delete logins	
	Fairchild, John jf@jf.com		Gradebook Lesson Plans	Last: Count: 0	1/1/2100	goto edit delete logins	
	<u>Jones, Karen</u> kj@kj.com	Highly Qualified	Gradebook Lesson Plans	Last: Count: 0	1/1/2100	goto edit delete logins	
	Moore, Ann am@am.com		Gradebook Lesson Plans	Last: Count: 0	1/1/2100	goto edit delete logins	
	Rutherford, Ann ar@ar.com		Gradebook Lesson Plans	Last: Count: 0	1/1/2100	goto edit delete logins	
	Smith, Mary marysmith@ms.com	Self-Contained	Gradebook Lesson Plans	Last: Count: 0	1/1/2100	goto edit delete logins	
	<u>Smith, Matt</u> ms@ms.com Undeliverable: Address does not exist		Gradebook Lesson Plans	Last: 1/4/2008 Count: 2	1/1/2100	<u>goto</u> edit delete logins	
	<u>Whitman, Beth</u> bw@cgs.com	Self-Contained Highly Qualified	Gradebook Lesson Plans	Last: 1/29/2010 Count: 42	1/1/2100	<u>goto</u> <u>edit</u> <u>delete</u> <u>logins</u>	<u> </u>
• [•	

Main > Instructors

Initially there will be no instructors and you will be prompted to create one. **Note:** Email addresses resulting in <u>delivery failures</u> are noted in red.

Create Instructor

Enter a new instructor for your school.

Mass Edit

Make the same changes to many instructors.

<u>Goto</u>

Enter a chosen account as if logged in as that instructor.

<u>Edit</u>

Modify instructor information. Mark active/inactive. **Note:** To view inactive instructors, uncheck the "Hide Inactive Instructors" box.

Delete

Remove the chosen instructor and associated records from your school. Deleting an instructor will also delete all of their SchoolInsight records (classes, assignments, scores, email logs, etc). **Note:** Use caution when deleting as this cannot be recovered. You may want to mark the teacher "inactive" instead (Main > Instructors > edit).

Logins

View a history of successful/failed logins for a chosen instructor. For more details see the "Login <u>History</u>" section under "Login".

7.1 Create Instructor

Create new instructors or create an instructor using an existing employee. **Note:** When employee management is enabled, detailed information can be entered while creating new instructors. For more details goto <u>Main > Employees</u>.

	Create Instruct	or .	
	• Create a new em	nployee	
	C Use existing emp	ployee	
	Title:		
	*First Name:		
	*Last Name:		
	*Email:		
	*Password:		
	*Confirm Password:		
	*Self-Contained:		
		C Gradebook	
	*Modules:	C Lesson Plans/Curriculum Mapping	
		 Both. Usability optimized for Gradebook 	
	Highly Qualified:		
	* required field		
	Save & Add Anothe	r Save Only Back	•
•			

Main > Instructors > Create Instructor

Self-Contained

Choose if the instructor has a self-contained classroom, or not. This will change the language SchoolInsight uses to communicate with this teacher. SchoolInsight adapts to make each type of teacher comfortable.

Elementary teachers typically have a self-contained classroom, with one group of students to which they teach many subjects. They may occasionally exchange students for a subject (reading groups, math groups, etc), but most of their time is spent with one group of students. SchoolInsight will refer to the teachers' "subjects" and not their "classes" (since the teachers typically only have one class).

Secondary teachers will have many classes of students to which they teach a single subject (or related subjects). SchoolInsight will refer to the teachers' "classes" and not their "subjects."

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Middle School teachers may or may not be self-contained. Choose whichever level is most appropriate. SchoolInsight will work appropriately in either case.

Modules

Indicates which product modules have been purchased.

Highly Qualified

This Yes/No field allows you to note teachers as highly qualified to teach school curricula based on State and NCLB requirements.

7.2 Goto Instructor

Go to the chosen instructor's main page. Admins can enter instructor accounts as if logged in as that instructor. This allows the admin to enter or update data in the event the teacher is unavailable for some reason. **Note:** Admins are given ability to "goto" through the permission templates.

Main	Gradebook	Planning	Communication	Misc	Help	Logout	
Instructor Ma	in						
School: Lincoln S Instructor: Jay Bir	chool dman						
GradeBook	Planning	Com	municate N	lisc			
Setup	Setup	Setu	ip Parents U	Jser Guides			
Assignments	Lesson P	ans Ema	il Addresses E	Behavior Logs			
Scores/Comment	ts Search Le	essons Viev	v Parent Info)iscipline			
Standards Summ	ary <u>Curriculu</u>	n Maps <u>Com</u>	ipose Email – F	Report Cards			
Attendance	Search M	aps <u>Ema</u>	il Logs <u>F</u>	Refer a Friend			
Reports	Standard	<u>Ann</u>	ouncements <u>U</u>	Jpdate Account			
	Reports		<u>s</u>	Switch Role			
			<u>v</u>	Vhat's New?			
Back to SDAdr	mins Back to So	hoolAdmin					-
•							Þ

Main > Instructors > Goto

When you "Goto" an Instructor, quickly switch between instructors by clicking **[change]** to the right of the instructor's name at the top of the page. This generates a dropdown list of instructors at the school. Simply click an instructor's name and you'll automatically be switched to that instructor.



Back to SDAdmins

Returns you to School District Admin Main for your district, if you have school district admin permissions.

Instructors	25

Back to SchoolAdmin Returns you to Admin Main for your school.

Main > Instructors > Edit

7.3 Edit Instructor

Modify instructor data. Update their name, email, password, level, etc.

	Edit Instructor		
	Title:	Ms.	
	*First Name:	Karen	
	*Last Name:	Jones	
	*Email:	kj@kj.com	
	Password:		
	Confirm Password:		
	*Self-Contained:	Yes 💌	
	*Modules:	 Gradebook Lesson Plans/Curriculum Mapping Both. Usability optimized for Gradebook 	
	Highly Qualified:	Yes 💌	
	Active:	Yes	
	External ID:		
	* required field		
•	Cure Duck		-

Active

Mark teachers inactive if they leave your school or are temporarily off roll. Mark the instructor "inactive" to prevent their ability to login, while preserving their data. **Note:** Inactive instructors will not count against your SchoolInsight subscription.

External ID

When interfacing with external systems, external id's allow SchoolInsight to import/export data in compatible formats. An external id is the unique string used by the external system to identify this instructor. Enter this data if you'd like to facilitate import/export.

Email: Update the admins email address. **Note:** If email sent to this address results in <u>delivery</u> <u>failures</u>, the address will be disabled by SchoolInsight. Update the email address to enable the instructor to send/receive emails. Instructors can update their own email from Instructor Main > Update Account.

Note: When employee management is enabled you can also edit employee information for instructors here or at <u>Main > Employees > Edit</u>.

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7.4 Mass Edit Instructor

Make the same change(s) to many instructors at the same time.

Main > Instructors > Mass Edit

		dit						
	Data to Edit							
Self-C	ontained:	•						
Module	©N OG OLe OB	o Change radebook esson Plans/Curricul oth. Usability optimize	um Mapping ed for Gradebo	ok				
Highly	Qualified:	•						
Active:		•						
Edit?	Instructors	tructors to Edit Options	Modules					
Edit?	Ins Instructors Birdman, Jay	tructors to Edit Options Self-Contained: No Highly Qualified	Modules Gradebook Lesson Plans					
Edit?	Instructors Birdman, Jay Bradley, Brenda	tructors to Edit Options Self-Contained: No Highly Qualified Self-Contained: No Highly Qualified	Modules Gradebook Lesson Plans Gradebook Lesson Plans					
Edit?	Instructors Instructors Birdman, Jay Bradley, Brenda Chase, Brian	tructors to Edit Options Self-Contained: No Highly Qualified Self-Contained: No Highly Qualified Self-Contained: No	Modules Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans					
Edit?	Instructors Instructors Birdman, Jay Bradley, Brenda Chase, Brian Jones, Karen	tructors to Edit Options Self-Contained: No Highly Qualified Self-Contained: No Highly Qualified Self-Contained: No Self-Contained: No Highly Qualified	Modules Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans					
Edit?	Ins Instructors Birdman, Jay Bradley, Brenda Chase, Brian Jones, Karen Rutherford, Ann	tructors to Edit Options Self-Contained: No Highly Qualified Self-Contained: No Highly Qualified Self-Contained: No Highly Qualified Self-Contained: No	Modules Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans					
Edit?	Instructors Instructors Birdman, Jay Bradley, Brenda Chase, Brian Jones, Karen Rutherford, Ann Smith, Matt	tructors to Edit Options Self-Contained: No Highly Qualified Self-Contained: No Highly Qualified Self-Contained: No Self-Contained: No Highly Qualified Self-Contained: No Self-Contained: No	Modules Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans Gradebook Lesson Plans Gradebook					

Modify instructor details, module assignments, qualifications and/or active status. Select information to assign, select instructors to apply changes to and save.

8 Employees

Manage employee demographics for your school. Track addresses, phone numbers, degree and employment details. Easily locate contact information for staff members. Generate employee lists and mailing labels with the "<u>Employee Details</u>" report. **Note:** Employee management is enabled at the school district level. For a single school district, enable employee management at Main > Options > Permissions.

Note: When employee management is enabled, detailed information can be entered while creating new admins/instructors.

Employees .						
School: All		Scl	hoolInsight Use	Role:	All	
Create Employe	ee Back					
Employee	SchoolInsight User Role	School	Position Type	Active		
	School District Admin			Yes		
Admin, Adam	School Admin	Lincoln School		Yes	view edit	
	School Admin	First School		Yes		
Birdman, Jay	Instructor	Lincoln School	Teachers	Yes	view edit	
Dradley Branda	School District Admin			Yes	view edit	
bradiey, brenda	Instructor	Lincoln School		Yes	view ear	
Chase, Brian	Instructor	Lincoln School		Yes	view edit	
Fairchild, John	Instructor	Lincoln School		Yes	view edit	
Johnson, Joe	Other	Lincoln School	Aides	Yes	view edit delete	
Jones, Karen	Instructor	Lincoln School		Yes	view edit	
Jones, Thomas	School Admin	Lincoln School		Yes	view edit	
Moore, Ann	Instructor	Lincoln School		Yes	view edit	
Nurse, Nancy	School Admin	Lincoln School		Yes	view edit	
Principal, Betty	School Admin	Lincoln School		Yes	view edit	

Main > Employees

School: View/manage employees for your school. If you select "All" you can view employees and their roles for all schools in your district.

SchoolInsight User Role: Narrow choice by user role defined within SchoolInsight.

Create Employee

Create a new employee for your school with the "SchoolInsight User Role" of "Other". **Note:** To create admin and instructor roles goto <u>Main > Admins</u> or <u>Main > Instructors</u>.

View

View and/or edit employee information for your school. **Note:** Manage information for employees that do not have a user login.

<u>Edit</u>

Modify employee information. Mark them active/inactive.

<u>Delete</u>

Remove an employee from the system. **Note:** Only employees with user role of "Other" can be deleted here. Delete "Admins" at <u>Main > Admins</u>, delete "Instructors" at <u>Main > Instructors</u>. **Note:** Delete should be used with caution as this cannot be undone. You may want to mark them "Inactive" instead.

8.1 Edit Employees

Modify employee information for a chosen employee. Assign a position type for user role. Mark them active/inactive for a user role. Enter values for employee custom data fields. **Note:** Employee custom data fields are defined by School District Admins. **Note:** Available fields vary based on the school district's state.

	Edit Employee							
	Employee: Brenda Bradley							
		Basic Information	Emj	ployee Contact Info	1			
	Title:	•	Address 1:	1800 Elm				
	*First Name:	Brenda	Address 2:					
	Middle Name:		City:					
	*Last Name:	Bradley	State:					
			Zip:	60000				
			Work Phone:	555-555-1234				
			Cell Phone:					
			Home Phone:					
•				l l				

Main > Employees > Edit

Enter/update employee basic and contact information. **Note:** Manage information for employees that do not have a user login.

Note: When employee management is enabled you can also edit employee information for instructors at $\underline{Main > Instructors > Edit}$ and for admins at $\underline{Main > Admins > Edit}$. Changes made are updated on all corresponding pages for the employee.

	Employee Demographic Da	ata	
SSN: (e.g. 123456789)		Employee Number:	1009
Birthdate:		IEIN:	1009
Ethnicity/Race:	Asian Black or African American White American Indian or Alaska Native Native Hawaiian or Other Pacific Islander	Employer RCDTS:	
Highest Degree:	Master's Degree - MAST	Gender:	F
Maiden Name:		Employment Start Date:	
Tenured:	Yes 💌	Employment End Date:	
Union Representative:	No	Employment End Reason:	

Enter/update employee demographic information.

SchoolInsight User Role	School	Position Type	Custom Employee Data	Active	+	
School District Admin				Yes		
Instructor	Lincoln School	Instruction and Curriculum Development	Special Certification Complete: Teaching Associations: NEA	Yes 💌		
* required fields						
Save Back						٦

View employee user role(s). Update their position type. Mark them active/inactive. Note: For certain states the employment positions portion of this page may be different than pictured above.

Use the 📕 to add another user role/school/position type. **Note:** Only the user role of "Other" can be added from this page.

Notice the field "Union Representative" in the "Employee Demographic Data" section and the fields in the "Custom Employee Data" column, above. These are custom employee data fields which have been defined by your School District Admin.

9 School Options

Manage school options from a single area. Configure special school data, set permissions for instructors and parents, manage module options and enable special functionality. Options are grouped into common areas; Students, Instructors, Modules and Misc.

Note: For school districts with more than one school several entities are automatically set to district managed. These include: lesson plan templates, curriculum map templates, standards, standard scales, longitudinal data analysis, graduation requirements, transportation codes, and district transcript tests/data points. Only school district admins have permissions to change these entities for multiple school districts. For single school districts the school admin permissions remain unchanged.

Options Main				_
Students	Instructors	Modules	Letter Printing	Misc
Configure Student Data	Permissions	Grade Reporting	Letterhead	Academic Years
Parent Information Access	Email Templates	Attendance	Font & Size	Course Levels
External Schools	Comment Lists	Scheduling	Salutation	Translation
Transportation Codes		Tuition/Fees		Lockers
		Lunch		Email Log Permissions
		Discipline		Promotion Permissions
				Course Display
Back to Main				_
•				Þ

Main > Options

Students

- Create and maintain custom data fields
- Define what's visible on the parent portal
- Setup home and serving schools
- · Customize student transportation codes

Instructors

- Set Instructor permissions
- Manage teacher email templates
- Manage teacher comment lists

Modules

- · Set options for purchased modules
- Options can also be managed from within in each module

Letter Printing

• Set defaults for printing letters at your school

Misc

- · Set academic year viewing options
- Define course levels
- · Enter descriptions in other languages for multi-lingual report cards
- · Enable use of locker management and configure locker assignments
- · Assign email log permissions for employees and parents
- · Allow other schools in your district to promote students to your school

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9.1 Students

Customize student/parent information used by SchoolInsight. This includes configuring special student data, setting parent web access, defining external schools used in concurrent enrollment, and modifying transportation codes.

Note: The majority of these apply only if you're school has purchased Core Student Management.

Configure Student Data

Parent Information Access

External Schools

Transportation Codes

9.1.1 Configure Student Data

Configure student data allows you to customize demographic data for your students. Define custom fields and track student data specific to your school. View custom and general fields on Students pages. Generate custom reports using custom/general fields. **Note:** You're school/district must have purchased Core Student Management to configure student data.

Commonly used student data is pre-populated in "General Fields". Additionally, custom fields of different data types can be created to meet your school's data needs.

Main > Options > Configure Student Data

Configure S	tudent Data							E
Custom Field	s General Fields							
School	Name	Active	Mandatory	Show on 'Students - Multi View'	Reset Value During Yearly Promote	Туре		
Lincoln School	Academic Probation	Yes				List	edit merge deletelist	
Lincoln School	Attends Vocational School	Yes	Yes	Yes	Yes	True/False	edit merge delete	
	Family ID	Yes				Number - Integer	edit merge delete	
	Kindergarten AM/PM	Yes	Yes		Yes	List	edit merge deletelist	
Lincoln School	Left Handed Students	Yes				True/False	edit merge delete	
	Special Ed Advisor	Yes				Text String	edit merge delete	
	Special Student Information	Yes				Large Text String	edit merge delete	
	Test Score	Yes				Number with Decimal Place	edit merge delete	
Lincoln School	User ID	Yes				Text String	edit merge delete	
Create New Fi	eld Back							

Use the "Custom Fields" and "General Fields" tabs to toggle between student data fields. The table above shows examples of both district and school defined custom fields. **Note:** The "School" column is blank for district defined fields. Schools cannot change district defined custom fields.

Initially, no custom fields will exist and you will be prompted to create one.

Create New Field

Create custom fields to meet your school's needs. See the "Create Custom Field" section for more details.

<u>Edit</u>

Modify details for a chosen custom or general field. Choose to have the field's value reset when promoting students. **Note:** The field "Type" cannot be changed. **Note:** Pre-populated "General Fields" names cannot be modified.

<u>Merge</u>

Merge two custom fields of the same type. See the "Merge Custom Field" section for more details.

Delete

Delete a custom field. **Note:** Once a custom field has been used it cannot be deleted. Edit it to mark it inactive instead. **Note:** Pre-populated "General Fields" cannot be deleted.

<u>List</u>

Manage list items for custom fields of type "List". View/edit/delete list items. Add new list items. Mark list items active/inactive.

Configure	e Student Data						
Custom Fie	elds General Fields						
School	Name	Active	Mandatory	Show on 'Students - Multi View'	Reset Value During Yearly Promote	Туре	
Lincoln School	504 Accommodation	Yes				True/False	<u>edit</u>
Lincoln School	Academic Track	Yes				Text String	<u>edit</u>
Lincoln School	Acquire Use and Knowledge Skills	Yes			Yes	Number - Integer	<u>edit</u>
Lincoln School	Addressing Needs Related to Domestic Violence	Yes				True/False	<u>edit</u>
Lincoln School	Advisor	Yes				Text String	<u>edit</u>
Lincoln School	Aquire Use and Knowledge Skills	Yes				Number - Integer	<u>edit</u>
Lincoln School	Assistance with Participation in School Programs	Yes				True/False	<u>edit</u>
Lincoln School	Before-School, After-School, Mentoring, Summer Programs	Yes				True/False	<u>edit</u>
Lincoln School	Birth Date	Yes				Date	edit
Lincoln School	Birth Place	Yes				Text String	<u>edit</u>
Lincoln School	Bus Stop	Yes		Yes		Text String	edit

Below are "General Fields". You'll note that you only have the edit option for these fields:

Manage student data for custom/general fields from the Admin Main > Students pages:

- View general fields data under general, demographics and misc info tabs on <u>Admin Main ></u> <u>Students - Single View</u>
- View custom fields at Admin Main > Students Single View > Misc Info
- Enter student data for custom fields from the Students pages
- Use mass edit to update data for many students at Admin Main > Student- Multi View > Mass Edit

Once student data is entered into custom fields, generate reports to view details:

- Generate a <u>Custom Student Report</u> using custom fields. Use custom fields to "Filter Students" and/ or include them in "Fields to Show".
- Generate a <u>Custom Form</u> using custom fields. Select them from "Available Fields" when designing the form.

9.1.1.1 Create Custom Field

Create custom fields to track student data for your school. Choose from several provided data types.

Main > Options > Configure Student Data > Create New Field

Name: Enter a descriptive name for the data field. The field will be available on student demographics pages and custom reports.

Type: Select the type of custom field to create.

The following data types are provided for configuring student data:

- **Date:** Create a date field. Dropdown boxes for Month/Day/Year will be provided for entering student data.
- Number Integer: Create a data field with an integer value.
- Number with Decimal Place: Create a data field with a number containing a decimal value (sometimes called a "floating point number").
- Text String: Create a custom field that allows for input of one line of text.
- List: Create a list of items to choose from when entering student data. Enter list items in provided text boxes. Use the 🛨 to add more items to the list.
- Large Text String: Create a custom field that allows for input of many lines of text. The provided text box automatically expands.
- True/False: Create a custom field to enter a Yes/No value.

Mandatory: Choose to make the field mandatory when creating new/editing existing students.

Show on 'Student - Multi View' Page: Choose to show the field in the "General Information" column of the "Students - Multi View" page.

Reset Value During Yearly Promote: Decide to have the field reset during student promote. When "Yes" fields are reset to null/blank. When "No" field values will be copied to the next academic year. **Note:** This also initializes the "Reset Values" field on the <u>Promote Students</u> page.

Once created, view new fields on Admin Main > Students - Single View > Misc Info.

Enter student data for the new field from either: Admin Main > Students - Multi View > Edit - OR -Admin Main > Students - Single View > Edit Student

Update data for many students at once from Admin Main > Student- Multi View > Mass Edit.

9.1.1.2 Merge Custom Field

Merge custom fields to combine similar fields of the same type. Merge two fields into one while preserving already entered data. This is useful for cleaning up duplicate school fields or combining individual school fields into one, common district field.

Main > Options > Configure Student Data> Merge

	Merge Stud	lent Custom	Field	
	Field to Merge:	Family ID		
	Merge Into:	Family ID -		
1	Merge Back		ŀ	-

Schools can merge custom fields they have created and/or merge their custom fields into district created fields.

In the example below, there's a district and school custom field with the same name and type called "Family ID":

Custom Field	s General Fields					
School	Name	Active	Mandatory	Show on 'Student Multi-View' Page	Туре	
Lincoln School	Attends Vocational School	true	false	true	True/False	edit merge delete
	Family ID	true	false	false	Number - Integer	
Lincoln School	Family ID	true	false	false	Number - Integer	edit merge delete
1						

Once the school merges, the district field remains and any existing student data from the school is preserved under the "merged into" field:

Custom Field	s General Fields							
School	Name	Active	Mandatory	Show on 'Student Multi-View' Page	Туре			
Lincoln School	Attends Vocational School	true	false	true	True/False	edit merge delete		
	Family ID	true	false	false	Number - Integer			
							Þ	1

Note: Fields can have different names, but must be of the same type.
9.1.2 Parent Information Access

Set options for parent access to their students' information via the parent portal. **Note:** If these setting are managed at the district level individual schools cannot make modifications.

		Jetunga			
Disable all parent/student access (useful in the summer) \Box					
nstructors can modify p	arent	/student ac	cess		~
Allow parents/students	to rec	eive autom	atic email notific	ations	•
Information		Available	Information	Availa	ble
Which Data Is Available			Report Cards		
Future Academic Yea	rs		Assignments	~	
Closed Academic Ye	ars		Behavior Logs	~	
Inactive Data			Attendance	•	
Grades			Calendar	~	
Traditional Scores			Send Email	~	
Standards-based Sco	ores		Meal Menu	~	
Show Percentages			Fees	~	
Show Letter Grades			Digital Lockers	~	
Comments			Donations	~	

Main > Options > Parent Information Access > Edit Parent Information Access

Disable all parent/student web access: Turn off access to SchoolInsight for all student/parent logins for your school. This is useful during the summer when access may not be desirable. Parents/ students will see a message on the parent portal. Disable web access for a single parent/student at <u>Main > Students - Single View > Edit Student</u> (Misc Info section).

Instructors can modify parent/student access: Allow instructors to modify which information is available to parents/students on the parent portal. Settings for a subset of information shown here can be changed by instructors. **Note:** Set teacher permissions here or at <u>Main > Options ></u> <u>Permissions</u>.

Allow parents/students to receive automatic email notifications: Check to allow alerts to be set from the parent portal. Parents/students can determine when to receive automatic email notifications based on information updates, such as updated grades and low lunch balances.

Check which information is available for parents/students from the parent portal. Once saved, settings are automatically applied to all instructors/parents/students. **Note:** The information list is different depending on which SchoolInsight modules your school has purchased.

Shown below is an example of what parents see on the parent portal and available settings:

	Update Password/Profile		
	Change any information about your account	t.	
	Info Password Preferences		
	Can teachers send me email?	Yes -	
	Enable automatic email notifications	Yes	
	Receive email when grades are updated	Yes 💌	
	Receive email for low lunch balance	Yes v Low Balance Threshold: \$5.00	
	Notification frequency	Once per hour	
	Do not send email between	Central Time	
•	<< Prev Next >> Save Cancel		•

Notification frequency: Available options are:

- Immediate includes option to set "quiet times"
- Once per hour includes option to set "quiet times"
- Once per day
- Once per week

9.1.3 External Schools

Students may be enrolled in multiple schools. Define other schools that interact with your school.

A home school is where a student resides and reports attendance. Serving schools are where the student actually attends classes.

You can run separate attendance reports for each school, if each school tracks attendance using SchoolInsight.

Assign students to home/serving schools in the "Enrollment Details" section when <u>creating/editing</u> <u>students</u>.

	External School	ols			
	School Name	State Code	Active		
	Home School		true	edit delete	1
	Washington School		true	edit delete	
	Create External So	chool	Back		•
◀				•	\square

Main > Options > External Schools

9.1.4 Transportation Codes

Define transportation codes that can be used for state attendance reports. Use existing or create new codes to meet your school's needs.

Note: For school districts with multiple schools transportation codes are automatically set to be district managed and can only be modified by school district admins. For single school districts the school admin permissions remain unchanged.

Trans	portation Codes	
Code	Description	
Walker	Walker	edit delete
<1.5 mi	Takes bus, lives < 1.5 mi away	edit delete
>1.5 mi	Takes bus, lives > 1.5mi away	edit delete

Main > Options > Transportation Codes

Create Transportation Code

Create a new transportation code and provide a description. **Note:** Once a code has been used it cannot be deleted.

	Create Transportation Code
	Code: Walker
	Description: Walks to School
	Save Back
•	

9.2 Instructors

Set instructor permissions and view/update email templates and comment lists for teachers to use when communicating with students/parents.

Permissions

Email Templates

Comment Lists

9.2.1 Permissions

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View and edit school options for instructor permissions.

Main > Options > Permissions

	Instructor Options	
	Can modify grading periods	
	Can modify students	
	Can modify classes	
	✓ Can modify rosters	
Instructor Permissions	Can modify contacts/email addresses	
	Can modify parent/student web access	
	✓ Can modify groups	
	Can see future academic years	
	$\overline{oldsymbol{arsigma}}$ Can share gradebook data with other instructors (schedule, attendance, grades, behavior	
	logs)?	
	Instructors can import default grading scales and change percentages only	
Do teachers share their lesson	Yes - teachers share by default. Save and Refresh Instructors	
plans and	Teachers can modify lesson plan and curriculum map sharing permissions	
curriculum maps by default?	Teachers can hide lesson plans and curriculum map items	

Individual teachers may have admin privileges to setup their accounts (create students, create classes, etc). This allows teachers to get started right away without needing main office support.

While this feature is convenient, it can get "messy" when a large number of teachers all are entering student information. For example, often the same student will be entered in different conventions (John Smith, Jonathan Smith, JOHN SMITH, etc) causing duplicates and confusion.

Privileges may be given to teachers to modify information pertaining to grading periods, students, classes, rosters, contacts and parent web access. Each can be individually assigned but the default setting is to only allow teachers to modify class, roster and parent web access information.

Instructor Options

- Can modify grading periods: Determines if instructors can create classes in grading periods that don't already exist.
- Can modify students: Determines if instructors can add/remove students.
- Can modify classes: Determines if instructors can set up their own classes.
- Can modify rosters: Determines if instructors can add/remove students from classes.
- Can modify contacts/email addresses: Determines if instructors can add/remove parent/ guardian contacts for their students.
- Can modify parent/student access: Determines if instructors can change parent/student web access.
- Can modify groups: Allows teachers to manage assigned groups and create/manage their own groups.
- Can see future academic years: Allow teachers to see academic years marked "future".

- Can share gradebook data: Allow/disallow teachers to see each others gradebook information. Setting applies to all academic years.
- Grading Scales (drop down box):

1) **Instructors cannot change grading scales:** Forces teachers to use an admin created grading scale. Use this option if you want to standardize grading scales. This option is recommended when using report cards.

2) **Instructors can import default grading scales and change percentages only:** Same as above but allows teachers to change the percentage required for a grade threshold. (i.e. a teacher wants to give an A to anything over 85%). They can also choose between different admin created grading scales.

3) **Instructors can make any change to grading scale (can't use GPA):** Use this option to allow teachers to use any grading scale they wish. Since grading scales will not be standardized, you will not be able to give out grade point averages if this option is used.

Do teachers share their lesson plans and curriculum maps by default: When set to yes the sharing default is set for new instructors. Allow teachers to hide their lesson plans and curriculum map items from other teachers. Admins can view hidden items. To force sharing, set the sharing default and prevent teachers from changing permissions.

Note: If you are a single school district you will also have the option to enable employee demographic management for your school.

9.2.2 Email Templates

Several email templates are provided for sending quick emails to students/parents.

Main > Op	otions >	Email	Temp	lates
-----------	----------	-------	------	-------

Email Temp	lates		
-			,
Template Type	Name	Action	
Welcome	Welcome	edit	
General	Forgotten backpack	edit delete	
General	Please call me	edit delete	
Academic	Needs extra assistance at home	edit delete	
Academic	Did Excellent Work	edit delete	
Academic	Needs to Give More Effort	edit delete	
Academic	Did Not Complete Work	edit delete	
Academic	Absent and needs to make-up work	edit delete	
Behavior	Was easily distracted	edit delete	
Behavior	Difficulty interacting with peers	edit delete	
Behavior	Was not cooperative	edit delete	
Create Templat	e Back		-
		►	Ē

Create Template: Create your own templates for different types of communication.

	Template Type	Description
0	General	Send email about general topics (forgot backpack, tardy to class, overall progress in class, etc).
0	Academic	Send email about an assignment (good job, good effort, absent and needs to make-up, needs help at home, etc).
\circ	Behavior	Send email about behavioral topics (needs to stay in seat, needs to raise hand before speaking, needs to show more respect, etc)

Choose: The different types of email each have features suited to particular issues. "General" email is good to use most of the time. If you are sending email pertaining to a specific behavior log or assignment, you will probably find the other two templates to be convenient.

General: This is the most basic type of email. If you've never sent an email before, choose this option.

Academic: Allows you to send an email about a specific assignment. SchoolInsight pulls all relevant information about the student work and includes it in the email.

44

School Options	45

Behavior: Send email about a behavior log. SchoolInsight will include the behavior log in the email.

9.2.3 Comment Lists

Two time saving comment lists are provided for you. Comments for each list can be viewed/edited/ refreshed for instructor's use. Teachers use "Scores" comment lists when entering student's Scores/ Comments. They can access and use "Behavior Log" comment lists when creating student behavior logs. **Note:** New comment lists to be used by teachers on report cards can be created at Main > Grade Reporting > Assessment Lists > Assessments > Create Assessment.

Main > Options > Comment Lists

	Comment Lists			
	Title	Туре		
	Scores	Scores	comments refresh	1
	Behavior Log	Behavior Log	comments refresh	
	Report Card Comments	Progress Report	comments edit delete	
	Back			•
4			•	

Comments

Add comments to a comment list, view existing comments, edit/delete comments from the chosen list.

<u>Refresh</u>

Push comment list changes to all teachers in your school.

<u>Edit</u>

Modify the comment list. **Note:** "Scores" and "Behavior Log" comment lists are provided for you and cannot be modified.

Delete

Remove the comment list. **Note:** "Scores" and "Behavior Log" comment lists are provided for you and cannot be deleted.

Below is an example of the comments in the comment list "Scores":

Comments	
Comment List: Scores	
Comment	Action
Excellent Work!	edit delete
Gave Extra Effort!	edit delete
Needs More Effort	edit delete
Incomplete Work	edit delete
Needs to follow instructions better	edit delete
Absent - please make up work	edit delete
Absent - excused from work	edit delete
Needs to be neater	edit delete

New Comment

Add a new comment to the chosen comment list. Also edit and/or delete comments on the list, as needed.

9.3 Modules

Manage options for purchased modules from one convenient location. **Note:** Options for each module can also be managed from within the modules.

Module options documentation is contained within each corresponding module.

Grade Reporting

Attendance

Scheduling

Tuition/Fees

Lunch

Discipline

9.4 Letter Printing

Set defaults for printing letters at your school. Defaults are used when reports are run with the option of generating printable letters using letter templates.

Note: Your school district admin may have set a default for "Font & Size". District admins can prevent schools from changing font options.

Letterhead

Font & Size

Salutation

9.4.1 Letterhead

View/modify the default letterhead for your school's generated letters. Change the format, add a school logo, etc. If you are unfamiliar with HTML code, please contact our technical services for help setting up/modifying your letterhead.

dit Letterhead	
:table class=template width=100%> <td :lass=template><big>Lincoln School</big> 1600 Main St. Watertown, IL ;0555</td 	
Lincoln School	
1600 Main St. Watertown, IL 60555	
Save Update Preview Back	

Main > Options > Letterhead > Edit

Update Preview

After making changes to the HTML code, update the preview to see how the letterhead has changed prior to saving.

9.4.2 Font & Size

View/modify the default font type and size for your school's generated letters. **Note:** Your school district admin may have set a default for "Font & Size". District admins can prevent schools from changing font options.

	Edit Let	ter Font & Size	
		Letter Formatting	
	Font	Arial	
	Font Size	10 💌	
	Save E	Back	
•		Þ	ſ

Main > Options > Font & Size > Edit

Select an available font from the dropdown box.

Select the font size.

Chosen selections will be used in the body of letters generated from reports.

9.4.3 Salutation

View/modify the default salutation for your school's generated letters.

	Edit Salutation			-
	Recipient		Format]
		Dear	[Contact Name]	
		Contact Name Format:		
		Example - "Dear Mr. John Smith	1"	
		O Title LastName		
	Specific contacts	Example - "Dear Mr. Smith"		
		• FirstName LastName		
		Example - "Dear John Smith"		
		C FirstName		
		Example - "Dear John"		
		Note: Contacts lacking the specified	information will be shown using the "Parent/Guardian of" format below.	
	Parent/Guardian of	Dear Parent/Guardian of	[StudentName]	
	No specific recipient	To whom it may concern		
	Save Back			-
•			•	

Recipient: The person(s) chosen to receive a printable letter generated from a report. **Format:** How the recipient will be addressed.

Below is an example using the salutation of "Dear FirstName LastName", for the "Specific Contacts" recipient, with the school's letterhead, in Arial 12:

Lincoln School 1600 Main St.
Watertown, IL 60555
September 26, 2011
Betty Baker
1234 Lane
Watertown, IL 65555
Dear Betty Baker,
This is to inform you that your child has been tardy to class too many times this grading period.
Student: Baker, Bob B.
Tardy: 4
Students are issued a detention when tardy 4 or more times to any class in a grading period
They must serve the detention within a week of receiving it
nie, niekośnie de detenień manina neok erfedelimigit.
Sincerely,
Ms. Principal

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9.5 Misc

Manage options for capabilities within SchoolInsight.

Academic Years

Course Levels

Translation

<u>Unique Numbers</u> (For single school districts only)

Lockers (Note: Your school must have purchased Core Student Management in order to use Lockers)

Email Log Permissions

Promotion Permissions

9.5.1 Academic Years

Set the instructor/parent/student viewing options for future and/or closed academic years.

Main > Options > Academic Years



- Hide future academic years from instructors: Allow teachers to view future academic years. Default is "Yes".
- Hide future academic years from parents: Allow parents to view future academic years. Default is "Yes".
- Hide closed academic years from parents: Allow parents to view past academic years. Default is "No".

9.5.2 Course Levels

Define academic levels for courses for your school. Once created, assign them when creating/editing courses.

Main > Options > Course Levels



Create Course Level

Create a new course level and position it in the list.

<u>Edit</u>

Change the course level name, sort order, and/or make active/inactive.

Delete

Remove the course level.

9.5.3 Translation

Enter descriptions in other languages when using multilingual report cards. First set "Grade Reporting" options to use multiple languages at Main > Grade Reporting > Options > Edit. Then update entities with language translations.

Translation		•
Courses	Translation Report	
Classes		
Grading Scales		
Standards Scales		
Assessment Lists		
Honor Roll		
Comment List		
Grade Codes		•

Main > Options > Translation

Note: Your SchoolInsight subscription must include the Grade Reporting module to use "Translation" for multilingual report cards. Usage details are documented in the <u>Multilingual Report Card Guide</u>.

9.5.4 Unique Numbers

If you are a single school district, you have the option to choose to define unique employee/student numbers for your school. Three options are available. Choose auto-generation, state or user created numbers. SchoolInsight will check for uniqueness as numbers are assigned.

Note: For districts with multiple schools, please see your School District Admin regarding this functionality.

	Unique Number Options			
		O Disabled		
		O Auto-Generate Numbers		
		Starting Value 1000		
	Unique Student/Employee Numbers	Use graduation year as prefix 🔽		
		Calculate prefix using graduating class as 8 - Eighth Grade	•	
		C Use State Number		
		O User Created Numbers		
		First Year to use Unique ID Numbers 2009-10 💌		
		Number Length 4		
		● Numbers are unique across all years		
		$\ensuremath{\mathbb{C}}$ Numbers are unique with in a year, but can be reused in different years		
	Save Back			•
i				

Main > Options > Unique Numbers > Edit

Disabled: Default is that unique student/employee numbers is disabled.

Choose another option to create unique numbers. SchoolInsight will automatically check to make sure that each number is unique, preventing duplicates.

Auto-Generate Numbers: Set criteria for auto generating unique employee/student numbers:

- Starting Value: Enter the starting number for auto generation.
- Use graduating class as prefix: Decide to use a prefix on student generated numbers. Note: "Number of digits" must be at least 6 to use this option.
- Calculate prefix using graduating class as: Appends a prefix of the student's graduating year to their student number, select the highest grade level in the school (e.g. For a k-5 school, select 5-Fifth Grade, for a high school, select 12- Twelfth Grade)

Use State Number: Manually enter state provided numbers.

User Created Numbers: Manually enter employee/student numbers of your choosing.

First Year to use Unique ID Numbers: Select the academic year to begin using unique id numbers.

Number of Digits: Determine the length of the student/employee numbers and if they can be reused each year.

<u>Save</u>

For auto-generate numbers, automatically assign student/employee numbers based on chosen criteria. **Note:** Numbers are generated for both active and inactive employees and students. For other selections, unique numbers will be assured that match chosen criteria.

Main > Options > Unique Numbers > [Auto-Generate Numbers] > Save



Auto-assign blank and invalid length numbers: Generates numbers only for those students/ employees with blank or invalid length numbers.

Auto-assign all student/employee numbers: Re-generates numbers for all students and employees, even if they currently have a number.

Numbers are generated based on the chosen criteria for active/inactive employees/students.

-							
	Unique Number ID Migration						
	This page shows all duplicates student numbers, or numbers with the incorrect length. Please fix any errors and save.						
	Save B	ack	1	1			
Grade Level Name Current Student Number Current State New Student/Employee Name Number Number Number Number Number		Error					
	7	Adams, Amy	<u>1000</u>	<u>1000</u>	1000	ID must be 5 characters long.	
	11	Arnought, Adam	<u>10001</u>	<u>1030</u>		Enter number to use as Student/State Number	
	11	Bradey, Bill	<u>10322</u>	<u>1032</u>	10322	ID is Unique <u>save</u>	
	7	Chen, Jessie	<u>10332</u>	<u>1033</u>	10332	ID is Unique <u>save</u>	
4						•	

Main > Options > Unique Numbers > [Use State or User Created Numbers] > Save

For state or manually created numbers: Enter new state or user created numbers. Correct existing numbers that don't match length criteria or aren't unique.

Note: State number becomes auto generated number, if blank and vice versa depending on selections.

Save individual number changes or make many changes and save all.

9.5.5 Lockers

Enable use of locker management and configure locker assignments. **Note:** Options can also be set at <u>Main > Lockers > Options</u>. Manage lockers at <u>Main > Lockers</u>.

Note: Your school must have purchased Core Student Management in order to use Lockers.

Main > Options > Lockers > Edit

	Locker Options	
	Academic Year: 2009-10	
	Locker Options	
	🗹 Enable Locker Management	
	\Box Allow multiple students in the same locker	
	Max Combinations per Locker 4	
	Auto-assign Lockers by	
	O Homeroom	
	Grade Level	
	C Team	
	Save Back	-
•		

Setup locker options for a chosen academic year.

Choose to allow students to share a locker.

Set the maximum number of combinations for each locker. **Note:** This number is used when assigning combinations at $\underline{Main > Lockers > Mass Edit Combinations}$. It is also used when importing lockers at $\underline{Main > Lockers > Import Lockers}$.

Determine whether to have lockers automatically assigned by homeroom, grade level, or teams. **Note:** You must use teams for scheduling in order to assign lockers by team. More details can be found at Main > Scheduling.

9.5.6 Email Log Permissions

Assign email log permissions for school employees and parents.

Main > Options > Email Log Permissions

	Email Log Permissions		
	Employees can view logs of email sent by other employees to parents/students:	Yes	
	Employees can view logs of email sent by parents/students to other employees:	Yes	
	Parents/students can view logs of email sent to/from other parents for their student(s):	Yes	
	Edit Email Log Permissions Back		
◀			

Edit Email Log Permissions

Modify permissions for parents/students/employees to view email logs. **Note:** If these permissions are managed at the district level, schools cannot change them.

	Edit Email Log Permissions		
	Employees can view logs of email sent by other employees to parents/students:	Yes 💌	
	Employees can view logs of email sent by parents/students to other employees:	Yes 💌	
	Parents/students can view logs of email sent to/from other parents for their student(s):	No 💌	
	Save Back		
◄		•	Г

• Employees can view logs of email sent by other employees to parents/students: This setting applies to both instructors, and admins when using "Goto" a student.

• Employees can view logs of email sent by parents/students to other employees: This setting applies to both instructors, and admins when using "Goto" an instructor.

• Parents/students can view logs of email sent to/from other parents for their student(s): If "No" parents only view email logs sent/received to/from their email address. If "Yes" parents can view any email logs associated with their student(s). **Note:** If student(s) have their own email address and this option is set to "Yes", students can read email sent between teachers and their parent(s) when logged in to SchoolInsight.

9.5.7 **Promotion Permissions**

Allow other schools in your district to promote students to your school.

Main > Options > Promotion Permissions



<u>Select which school(s) can promote students to your school.</u>

	Set Cr	oss School Promotion	
	Schools	s that may Promote to First School	
		Test School	
		Gradeschool	
		Learning Center	
		Monteray Academy	
		Lincoln School	-
	Save	Cancel	-
•			ſ

Check desired schools and save.

9.5.8 Course Display

Setup details on how course information is displayed for your school on SchoolInsight.

Main > Options > Course Display

	Course Display Optio	ns 🔺
	Course Information to Show:	Semester Credits Subject Area
	Edit Course Display Option	s Back 🚽
•		

Edit Course Display Options

Select information to show when courses are displayed for your school.

	Edit Cour	se Display Options	
	Course	Semester	
	Information	Credits	
	to Show:	Subject Area	
	Save Bac	:k	┚
◄		•	

Check desired information and save.

10 Import/Export

SchoolInsight allows you to easily import data from other student administrative systems.

You can also export data from SchoolInsight into those systems.

Detailed documentation for Import/Export is available on the Import/Export page under the "Documentation" link.

Import / Export	_
Import	Export
Documentation	Documentation
Import Employees	Export Instructors
Import Instructors	Export Students
Import Students	Export Courses
Import Student Pictures	Export Grades
Import Courses	Export Grading Period
Import Grading Periods	Export Classes
Import Classes	Export Rosters
Import Rosters	Export Report Cards
Import Standards	Export Email Addresses
Import Curriculum Maps	Export XAP Transcripts
Import Historical Grades	
Import Fees	
Import Lockers	-
•	

Main > Import/Export

11 Academic Years

School admins establish an academic year and corresponding calendar that reflect their academic school year. Academic years/calendars created here will then be accessible for use by instructors. They can also be viewed by students/parents on the parent portal. Multiple calendars, with unique details, can be created for a single academic year. Separate academic years can be created for summer school. Summer academic years automatically have a "Summer" grading period assigned.

Note: At the beginning of each academic year, several items must be setup in SchoolInsight. See the "<u>Start a New Academic Year</u>" section under "Academic Years" for more details.

Year	Status	
2011-12	future	calendars edit delete
2010-11	active	calendars edit delete
2010-11 Summer	active	calendars edit delete
2009-10	closed	calendars edit delete
2008-09	closed	calendars edit delete
2007-08	closed	calendars edit delete
2006-07	closed	calendars edit delete
Create Academic	Year	Back to Main

Main > Academic Years

Create Academic Year

Create a new academic year. Create a regular school year or a summer school year. **Note:** A new academic year must be created at the start of each school year. See "<u>Start a New Academic Year</u>" for more details. **Note:** If academic years are managed at the district level, schools cannot create academic years.

Calendars

View and manage calendars for the chosen academic year.

Edit

Update the academic year status. Mark future/active/closed.

Delete

Delete an existing academic year. **Note:** Extreme caution should be used when deleting a calendar, as this will eliminate all information associated with that calendar.

11.1 Create Academic Year

Initially, there will be no academic year and you will be prompted to create one. Copy existing entities from one year to another.

Note: A new academic year must be created at the start of each school year. See "<u>Start a New</u> <u>Academic Year</u>" for more details.

Main > Academic Years > Create Academic Year

	Create Academic Y	'ear	
	Academic Year:	2011-12	
	Status:	future 💌	
		Grading Periods	
		 Report Cards (Can't be copied for schools with Automated Scheduling) Assessment Lists 	
		Honor Roll Scale	
		☑ Attendance Options	
	Copy data from 2010-11 Academic Year:	Truancy Thresholds	
		Scheduling Options	
		Scheduling Constraints	
		✓ Food Items	
		☑ Bus Routes	
		☑ Lockers	
	Create Back		_
•			

Create a new academic year for your school. Create a regular or summer school year.

Academic Year: Choose the new year from the dropdown, either a regular or summer academic year.

Status: Mark the academic year as "active" or "future". Mark the academic year as "future" to allow admins access for setup and scheduling of the upcoming school year. **Note:** Choose to show/hide future years from instructors and parents at <u>Main > Options</u>. Default is that future years are hidden.

Copy data from previous year: Select options and entities that exist in the previous year to copy into the new academic year. **Note:** Available entities vary based on purchased modules and your school's configuration.

11.2 Edit Academic Year

62

Modify the status of a chosen academic year.

Main > Academic Years > Edit

	Edit Academ	nic Year 🔺
	Academic Year:	2011-12
	Status:	future 💌
1	Save Back	future active closed

Status: Make academic year future, active or closed:

- The current academic year should be active.
- Future years are useful for scheduling upcoming academic years. Future years can be hidden from instructors and students (<u>Main > Options</u>).
- Close past years so they cannot be modified. Closed years can still be viewed. **Note:** Marking a calendar closed will archive classes, grading periods, attendance or other information for that calendar year. It is recommended that past calendars be marked closed to preserve associated data.

11.3 Start a New Academic Year

For each academic year, maintenance operations must be performed in SchoolInsight to close out the year just completed and initialize the upcoming year. Follow the links below and make the necessary updates for the new school year.

Update Staff: Update your staff list. Create new admins as required. Create new teachers. Make departing teachers inactive.

Note: Mark teachers inactive after report cards/progress reports are complete for the past year.

Main > Admins

Main > Instructors

Create Academic Year/Calendar: Create a new academic year and corresponding calendar(s). Mark the academic year as "active" or "future". Mark them as "future" to allow admins access for setup and scheduling of the upcoming school year. You should also mark the last academic year "closed". **Note:** If you've already defined the next academic year as "Future", change it to "Active" so instructors can access it.

Copy data from previous year: Select data from the previous year to copy into the new academic year to save new year setup time.

Note: Available items vary based on purchased modules and your school's configuration.

Modify calendar details to match your school year.

Main > Academic Years

Main > Calendars

Main > Calendars > View > Edit Month

Update Students: Promote existing students to make them available in the next school year. Create or import new students. **Note:** For students who are graduating, don't promote them to the later academic year. In this way their data will be preserved, but they won't be active in the later academic years.

Main > Students > Promote Students

Main > Students > Create Student

Main > Import / Export > Import Students

Create New Grading Periods: Close all grading periods from the previous year, create new grading periods for this year and mark the current period "Active" to allow teachers to create rosters, enter attendance, grades, etc.

Main > Grading Periods

Main > Grading Periods > Create Grading Period

Copy Last Year's Classes/Sections: You'll need to create classes for the new year. An easy way to do this is to copy last year's classes (if this year's classes are similar to last year's). You can also manually create classes, as needed. **Note:** If your school is using "Manual Scheduling" and you have a schedule in the previous year, go to <u>Main > Scheduling > Copy Schedule</u> to copy the existing schedule to the future year.

Main > Classes/Sections > Copy Classes

Main > Classes/Sections > Create Class

Add Student to Rosters: Add students to the class rosters for the new year. Make sure you've promoted existing and created new students first. Then you can easily add existing students to the class rosters. For classes with the same roster, add students to one class and then copy that roster to one/many other classes.

<u>Main > Classes/Sections > Roster > Add Existing Students</u> <u>Main > Classes/Sections > Roster > Copy</u>

Additional Setup Items:

• If your school is using "Grade Reporting", add your classes to the report cards. Adjust the order that classes appear on report cards, as needed. For more details on configuring report cards go to <u>Setup Report Cards for a New Academic Year</u>

Main > Grade Reporting > Define Report Cards > Classes > Add Classes to Report Card

Main > Grade Reporting > Define Report Cards > Classes > Mass Edit

• If your school is using "Tuition/Fees" or "Lunch", rollover student fees to the next academic year.

Main > Tuition/Fees > Account Rollover

Main > Lunch > Account Rollover

12 Calendars

View/manage calendar(s) for a chosen academic year. **Note:** At least one calendar must be created for a new academic year.

Note: For schools that have purchased Core Student Management/SchoolInsight multiple calendars can be created for a single academic year.

Main > Calendars

Calendars					
				Academic Year:	2011-12 💌
Title	Date	Days School is Scheduled	Grade Levels	Calendar for External School/District	
Default Calendar	8/22/2011 - 6/1/2012	M Tu W Th F	12345678		view edit delete
K Calendar	9/6/2011 - 5/25/2012	M Tu W Th F	PKK		view edit delete
Import District Cale	endar Create Calendar	Back			

Create a new calendar for a chosen academic year. Create multiple calendars, as needed. This is useful when students in different grade levels start/end the year at multiple timeframes.

View

View the calendar details for the entire academic year. Modify details for each month/day to match your school year.

<u>Edit</u>

Modify the chosen calendar overall settings. **Note:** Once created, calendar start/end dates cannot be modified.

Delete

Delete the calendar from the academic year.

12.1 Create Calendar

Create a new calendar for a chosen academic year. Create multiple calendars, as needed. This is useful when students in different grade levels start/end the year at multiple timeframes. **Note:** Your calendar is initialized with commonly used holidays. <u>Edit months</u> to customize the calendar to match your school year.

Create Calendar		
Academic Year	2010-11	
Title:		
First day of attendance:		
Last day of attendance:		
Days school is scheduled:	🗆 Su 🖻 M 🖻 Tu 🖻 W 🖻 Th 🖻 F 🗆 Sa	
Grade Levels:	EC FK K	
	□ 7 □ 8 □ 9	
	PG Other UN	
	EE SM SS	
Calendar for external school/dist	trict:	
Create Calendar Back		

Main > Calendars > Create Calendar

Title: Enter a descriptive name for the calendar.

First Day of attendance: Enter the first day that students will be in session. **Note:** This will also be the first day of the academic calendar.

Last Day of attendance: Enter the last day that students are in session.

Days School is Scheduled: Select the normal days of the week that school is in session.

Grade Levels: Select the grade levels that apply to this calendar. Students are automatically assigned to the calendar based on their corresponding grade level in the academic year.

Calendar for external school/district: Used primarily to add another school's calendar for attendance purposes. **Note:** If checked, students are not automatically assigned to the calendar. Edit/mass edit students to assign them to this calendar.

12.2 View Calendar

SchoolInsight initializes a calendar for you with known holidays. Modify calendar details to match your school's academic calendar. Update months to reflect school holidays, teacher's institute, half day of attendance, etc. Enter daily activity details. Annual and monthly calendars can be printed for distribution, as needed.

Cale	endar	ear: 20	09-10																	
Edit	Overal	Il Setti	ngs	Add Ca	lendar	Days	Pr	inter-Fri	endly	Page	Back	c								
September 2009 view edit								Oc	tober	2009 <u>v</u>	iew eo	lit			No	ovemb	er 2009	9 <u>view</u> <u>e</u>	edit	
S	М	Tu	W	Th	F	S	S	М	Tu	W	Th	F	S	S	М	Tu	w	Th	F	S
			2 X	3 X	4 X	5					1 X	2 X	3	1	2 X	3 X	4 X	5 X	6 X	7
6	7 H*	8 X	9 X	10 X	11 X	12	4	5 X	6 X	7 X	8 X	9 X	10	8	9 X	10 X	11 H*	12 X	13 X	14
13	14 X	15 X	16 X	17 X	18 X	19	11	121*	49 V	44 V	4E V	16 V	17	15	16 X	17 X	18 X	19 X	20 X	21
20	21 X	22 X	23 X	24 X	25 X	26	18	190 ^{Mo}	onday	1	10/12/2	009	24	22	23 X	24 X	25 N*	26 H*	27 N*	28
27	28 X	29 X	30 X				25	263 LE No	egai Ho ote: Co	liday lumbu	s Dav		31	29	30 X					
	De	cembe	r 2009) <u>view</u> 🧕	edit			Ja	nuary	2010 <u>v</u>	iew ed	lit			F	ebrua	ry 2010	<u>view</u> e	<u>edit</u>	
S	М	Tu	W	Th	F	S	S	М	Tu	W	Th	F	S	S	М	Tu	u W	Th	F	S
		1 X	2 X	3 X	4 X	5						1 H*	2*		1 X	2 X	3 X	4 X	5 X	6
6	7 X	8 X	9 X	10 X	11 X	12	3	4 X	5 X	6 X	7 X	8 X	9	7	8 X	9 X	10)	(11 X	12 X	13
13	14 X	15 X	16 X	17 X	18 X	19	10	11 X	12 X	13 X	14 X	15 X	16	14	15 H	* 16	X 17)	(18 X	19 X	20
20 *	21 N*	22 N*	23 N*	24 N*	25 H*	26 *	17	18 H*	19 X	20 X	21 X	22 X	23	21	22 X	23	X 24)	(25 X	26 X	27
27 *	28 N*	29 N*	30 N*	31 N*			24	25 X	26 X	27 X	28 X	29 X	30	28						
							31													
	ſ	March 3	2010 <u>v</u>	<u>view</u> ed	it			A	April 20)10 <u>vie</u>	w edit	t				May 2	2010 <u>vi</u>	ew <u>edit</u>		
S	М	Tu	W	Th	F	S	S	М	Tu	W	Th	F	S	S	М	Tu	w	Th	F	S
	1 X	2 X	2 X	4 X	5 X	6					1 X	2 NI*	2							1

Main > Academic Years > Calendars > View Main > Calendars > [select academic year] > View

Hover over any day to view it's details. View/edit each individual month, as needed.

View [Month]

View/edit calendar details for a chosen month. Generate a printable page.

Edit [Month]

Modify school day details for a chosen month. Mark holidays, teacher institutes, half days, etc. Add detailed notes to convey school events. Set special school start and end times for days with unique schedules.

Edit Overall Settings

Modify setting for the calendar year. Change calendar title, scheduled school days, grade levels and/ or mark as external calendar.

Add Calendar Days

Enter additional days to the academic calendar. This is useful if the last day of school gets pushed out due to bad weather days.

Assign Cycle Days

Modify the cycle days when needed. This is useful if an unexpected "no school" day occurs and the

Calendars	69
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schedule needs to be adjusted. **Note:** Once attendance has been entered, the cycle day can't be changed. For more details see the "Assign Cycle Days" section in the Scheduling Admin Guide.

View school day and attendance key details at the bottom of the calendar page:

	No To To	te: Days with a * have tal number of school tal time in school (ad	days: justeo	e information. : 175 days I for half days): 17	'5 days	3	
			А	ttendance Key			
	Х	Pupils in Attendance	N	Not in Attendance	н	Legal Holiday	
	TI	Teacher Institute	HD	Half Day	ED	Emergency Day	
	FI	Full Day Inservice	AOG	Act of God Day	WFS	Improvement Day	-
4						•	

12.3 Edit Month

Modify details for a chosen month to customize your school calendar(s) to match your school year. Modify days using the dropdown box to note holidays, teacher's institute, half day of attendance, etc. Also, enter daily activities in the notes area for items, such as, 2:00pm Pep rally, 10:00am all school assembly, etc.

Edit Month									
Academic Year: 200	9-10								
				November 2009					
S M		Ти		W		Th		F	S
1 2 - School Day 4	9	3 - School Day 50		4 - School Day 51	_	5 - School Day 52		6 - School Day 53	7
X-Pupils in Att	endance 💌	X-Pupils in Attendance	•	X-Pupils in Attendance		X-Pupils in Attendance	•	X-Pupils in Attendance	
	A			<u>^</u>				*	
	-		-	v			-	v	
set school time		set school time		set school time		set school time	_	set school time	
8 9 - School Day 5	4	10 - School Day 55		11		12 - School Day 56		13 - School Day 57	14
X-Pupils in Att	endance 💌	X-Pupils in Attendance	•	H-Legal Holiday 💌	•	X-Pupils in Attendance	•	X-Pupils in Attendance	
	A		-	Veteran's Day 🔺	1		-	×	
	_							v	
set school time		set school time		set school time	'	set school time		set school time	
15 16 - School Day	58	17 - School Day 59		18 - School Day 60		19 - School Day 61		20 - School Day 62	2
X-Pupils in Att	endance 💌	X-Pupils in Attendance	•	X-Pupils in Attendance	-	X-Pupils in Attendance	•	X-Pupils in Attendance	1
			۸	A	1			*	
	<u> </u>	l 		j 🔟				i 🔟	
set school time		<u>set school time</u>		<u>set school ume</u>	_	set school time		set school ume	
2 23 - School Day	53 andance 💌	24 - School Day 64	-	25 HD-Half Day		26 H-Legal Holiday	-	27 N-Not in Attendance	12
				Thankagiving Brook		Thankagiring Day		Thankagitting Break	
				Inanksgiving break		Inanksgiving bay		Inanksgiving break	
I	v	<u> </u>	-	v			-	v	
set school time		set school time		Start Time: 8:10am	1	set school time		set school time	
				End Time: 11:10am					
				End nine.					
				Enrolled: 3					
9 30 - School Day	65								┢
X-Pupils in Att	endance 💌								
	A								
set school time									
Set School Unit									
Save Edit Weeks	nds Too Ba	ick							
Luit Weeke									

Main > Calendars > View > Edit [month]

Denote holidays, teacher institutes, half days, etc. by selecting attendance codes from the dropdown box. Enter descriptive details in provided text box to communicate special events.

Set School Time

Modify start/end and hours enrolled for a chosen school day. The school day start/end times will be shown on the Parents calendar page. This will override the default "School Time" set at Attendance > Options. **Note:** You will automatically be prompted to enter this data when assigning a HD-Half Day if no default is set at Attendance > Options.

Edit Weekends Too

Choose to edit weekends and add details just as for weekdays.

12.4 Monthly Calendar

View, print and/or edit a chosen calendar month.

Monthly Calendar						
	Month: November 2010 💌 Academic Year: 2010-11					
	Edit Show Weekends Too Printable Page Back					
	<u> </u>		November 2010		<u>> >></u>	
	М	Tu	w	Th	F	
	1	2	3	4	5	
		Cycle Day: T		Cycle Day: TH		
	8	9 Cycle Day: T	10	11 Holiday Veteran's Day	12	
	15	16 Cycle Day: T	17	18 Cycle Day: TH	19	
	22	23 Cycle Day: T	24 Not in Attendance Thanksgiving Break	25 Holiday Thanksgiving Day	26 Not in Attendance Thanksgiving Break	
•						

Main > Calendars > View [calendar] > View [month]

Edit the calendar to add special events, update days off, etc. Use the arrows to view previous/later months. Show weekends to include special weekend events on the calendar. Create printable pages for distribution.

13 Students - Single View

Easily find and view information for a single student. Search by initial, name or and/or grade level. Find students in any school in your district. **Note:** SchoolInsight will automatically switch you to the selected student's school.

Note: Available student information/tabs differ based on which modules your school/district has purchased.

Main > Students - Single View

tudents - Single View						
Search: Type here to search for a student (ex: 7 j smith) [?]	Academic Year 2010-11					
General Demographics Misc Info Contacts/Family Rosters Attendance Grades						
Discipline Fees Lunch Email Logs Health Records Longitudinal Data Analysis No student is currently selected. Please search for a student (use the "search" box above). Fees Fees						
						Create Student Students - Multi View Back
	► I					

Search: Several search options are provided for your convenience. See the following section on " <u>Student Search</u>" for more details on search capabilities.

Once the search list is generated, choose a student to view their data.

The student's general information will be displayed.

Use the tabs provided to view detailed data in each area.

Once a student is found, use the tabs and buttons provided to view/manage their information. **Note:** Each tab corresponds to another area within SchoolInsight. **Note:** Available student information/tabs differ based on which modules your school/district has purchased.

General, **Demographics** and **Misc Info:** Corresponds to information entered when <u>creating/editing a</u> <u>student</u>.

Contacts/Family: Corresponds to the <u>family/contacts</u> link on Students - Multi View. Link students in the same family and add contact information.

Scheduling: View/manage the student's , <u>student's rosters</u> and <u>course requests</u>, if available. Generate printable schedules in either graphical or textual format. See more details at <u>Main ></u> <u>Scheduling > (Printing) Students</u>.

Attendance: View/manage the student's <u>daily attendance details</u> for the chosen academic year. **Grades:** Review gradebook grades, view/manage <u>report card</u> and <u>historical grades</u>, if available. Generate transcripts.

Discipline: View/manage student's <u>behavior logs</u> and <u>discipline incidents</u>, if available.

Fees: View student's <u>fees</u> associated with all school accounts. View account balances, manage fees/deposits per account.

Lunch: View the student's <u>lunch</u> account activity. View their current running balance, manage their fees/deposits.

Email Logs: View <u>email logs</u> sent to the student/parents. Send an email and log it, as needed. **Health Records:** View student's medical/health related information that's entered when <u>creating/</u>editing a student.

Longitudinal Data Analysis: View student's <u>longitudinal data</u> for chosen years and subjects. View student's <u>performance trendlines</u> for chosen assessment type data points.
General De	mographics Misc Info	Contacts/Family Schedu	ling Attendance Grade	es
Discipline F	Fees Lunch Email Log	IS Health Records Lo	ngitudinal Data Analysis	
	Basic Info	Enrollment Info fo	or 2010-11 <u>history</u>	and the second s
lame:	Jones, Mandy	Current Status:	Active	
tudent Number:	5876	Grade Level:	6 - Sixth Grade	
Gender:	Female	School:	Lincoln School	
irth Date:	1/1/1999 (12y 8m)	Homeroom:	B Bradley	
hone:	555-123-1234	Advisor:		
SN:		Team:		
lailing Address:		Calendar:	Default Calendar	
hysical Address:	:	Entry Date:		
ledical Alert:	Yes	Entry Description:		A Comparison of the American State of the Am
mail Address:	No email entered.	Exit Date:		
	Would you like to create one?	Exit Description:		
		Enrollment Description:	Home Serving School: Lincoln School	
		Claimable for State Aid:		
		Tuition Paid to Another School:		
		Transportation Code:		
		Bus Stop:		
		School Session:		
		Length of Day (FTE):	Full Day (1.0)	
		School Time:	Normal	
		Graduation Date:		
		-		

The buttons at the bottom of the page correspond to the buttons/links on the <u>Students - Multi View</u> page and have the same functionality.

Create Student: Create a new student.

Edit, Delete or GoTo the student being viewed.

Transfer Student: Move a student to a different school in the current year. See <u>Main > Students -</u> <u>Multi View > Promote/Transfer Students > Transfer Students</u> for more details.

Students - Multi View: Switch to the multi view students page.

Add or change an email address for a student from the Student - Single View page under the "General" tab:

Email Address
No email entered. Would you like to create one?

Email Address: Create a new or modify an existing email address for the chosen student. New email addresses are initialized with a password. Set the "Parent Portal" language to Spanish, as needed. Choose to send a welcome email containing login and password information.

Email:	newemail@mail.com
Parent Portal Language:	English 💌
Initial Password:	791
Send Welcome Email?	Yes 💌

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Once their email is created/used, view a history of successful/failed logins for a chosen student or contact. For more details see the "Login History" section under "Login".

14 Student Search

Use student search to easily find and view information for a single or groups of students. Quickly find all students within a single grade level, or find students by name or academic year. From "<u>Students -</u> <u>Single View</u>" find students in any school in your district.

Several search options are provided for your convenience. Search by grade level, initial(s), full/partial name and/or academic year. Use combinations of search options to refine searches to meet your needs.

Note: All search results (up to 500) are provided in a student dropdown menu once any student is selected. Use this as a filter to find specific subsets of students, such as, all students in a grade level.

- To view an alphabetical listing of all students in a grade level, enter the grade level number in the search box. When "more results hidden" is shown at the bottom of the list, click **any** student to view the complete list in a dropdown menu.
- Note: From Students Single View:
 - Click "Show only this school" to only view students from your school, instead of students from all schools in your district.
 - If showing all your schools, once a student is selected SchoolInsight automatically switches to the corresponding student's school.

Search:	9	(ex: 7 j smith)[?]				
	Austin, Tom J (1070) - 9 [Lincoln School]					
Gener	Creston, Daniel C. (1076) - 9 [Lincoln School) s/Fami				
Discir	Jacobs, Harry (1038) - 9 [Lincoln School]	alth Re				
No otro	Jones, Jacquelyn May (1080) - 9 [Lincoln School]					
Please	Jones, Joe (1081) - 9 [Lincoln School]					
	Jones, Maureen Lynne (1041) - 9 [Lincoln School]					
Croate	Meyer, Daniel (1034) - 9 [Gradeschool]					
Create	Preston, Fredrick (1045) - 9 [Lincoln School]					
	Reddy, lan (1046) - 9 [Lincoln School]					
	Smith, Sam (1055) - 9 [Lincoln School]					
	(more results hidden) show only	this school				

Once any student is chosen and the dropdown menu appears, select the desired student in the grade level to view their information. Full results remain available until you do another search or exit the page. **Note:** Your original search is shown in the box to the right.

Student:	Cruz, Maria - 9 🔹	Sea	arch: 9		
Account:	Austin, Jane - 9 Baker, Bob B 9				
Category	Baker, Doug - 9				
	Cruz, Maria - 9				
Da	Hernandez, Sofia - 9		Amo	unt	
	Jones, Hector - 9				
1/28/200	Long, Michael - 9		(\$10.00)		(\$10.00)
	Rodrigues, Robert - 9				Balance:
	Sanders, Susan - 9 Smith, Amanda - 9				
Hide	Thomas, Matthew - 9				
🗆 Hide	Unger, Samantha - 9 Victor, Ronald - 9				
Create	Wade, Robert R - 9 Walten, Meagan - 9	Man	y Fees	Create I	Many Dep

Additional search options are shown below: Once the search list is generated, select the appropriate student to view their information.

• Enter all or part of a first or last name.

Search:	smi	(ex: j smith 7)
Canad	Smith, Amanda - 8	_
Gener	Smith, Sam - 5	_
	Smith, Susan - 5	1
No stude	Smith, Timothy - 6	
Pleases	Smith, Tom - 11	t -

• Enter a 4 digit academic year to view all students enrolled in that year.

Search: 2	007	(ex: j smith 7)
	Austin, Jane - 8 (2007)	
Gener	Baker, Bob B 8 (2007)	
	Chen, Amy - 7 (2007)	
No stude	Jacobs Harry - 5 (2007)	

• Enter a single initial to view all students with that initial at the beginning of either their first or last name.

Search:	(ex: j smith	7)
Carra	Austin, Jane - 9	\mathbf{r}
Gener	Jacobs, Harry - 6	
Discip	Jones, Hector - 9	IS
No stude	Jones, Jacquelyn May - 6	
Please s	Jones, Joe - 6	b
	Jones, Maureen Lynne - 6	L
Creat	Time, Justin - 6	w

• Enter combinations to narrow search results to a smaller subset.

	Search: ⁹ s
	Hernandez, Sofia - 9
Search: a s	Sanders, Susan - 9
Smith, Adam - 11	Smith, Amanda - 9
Smith, Amanda - 9	Unger, Samantha - 9

15 Students - Multi View

Enter new or view many existing students in your school. Modify student data, assign contacts and promote students to the following year.

5	Stude	nts - Multi View						
s	chool:	Lincoln School				Acader	mic Year: 2010-11 💌	
G	irade Le	evel: 11 - Eleventh	Grade 💌					
	Create	Student Search	Promote/Tran	sfer Students	Mass Edit	Mass Edit Contacts Ma	ass Delete Back	
Ī	<u>Grade</u> Level	<u>Name</u> △		<u>General</u> Information		Contacts		
	11	<u>Arnought, Adam</u> Bus Stop	Student Num Homeroom Calendar Re-Entry to the School	000 De Ca Same 8/2	04 fault lendar :6/2010		goto edit delete merge transfer contacts/family rosters schedule attendance discipline grades historical grades	
	11	Arnought, Adam Bus Stop	Student Num Homeroom Calendar Reason Unkn Inactive Enrolli	0004 Default Cal own 8/25/2010 ment	lendar		<u>goto edit delete merge</u> <u>transfer</u> <u>re-enroll contacts/family</u> <u>rosters schedule</u> <u>attendance</u> <u>discipline grades</u> <u>bistorical grades</u>	
	11	<u>Austin, Jane</u> 123 Way Aurora, IL 60134 Bus Stop	Student Num Homeroom Calendar Entry Date Medical Alert	1072 A Rutherford Default Calend 8/25/2010 Yes	lar	Melissa Austin 555-555-5555 Tony Austin 555-555-5555 Steve Mason Prevent Contact Melanie Smith 555-555-1234	goto edit delete merge transfer contacts/family edit contacts rosters schedule attendance discipline grades historical grades	
•	11	<u>Baker, Bob B.</u> 1234 Lane	Student Num Homeroom	1074		Betty Baker 555-555-6666	<u>qoto edit delete merge</u> transfer	•

Main > Students - Multi View

To view/manage a specific student's data, click the student's name link. From the "View Student" page you can perform many of the same functions as on the "Students" page. **Note:** Students with inactive enrollments are shown in gray.

Create Student

Add a new student, personal information, contacts, and enrollment information.

Search

Search for students by last and/or first name. Narrow by grade level, if desired.

Promote/Transfer Students

Update existing students' enrollment information for the next academic year. Promote students to the same or different buildings. Transfer multiple students to a different building in a current year.

Mass Edit

Quickly change student information for many students.

Mass Edit Contacts

Modify selected information for many contacts at once.

Mass Delete

Delete many students for chosen academic year. Narrow by grade level. **Note:** Use extreme caution when deleting students as this cannot be undone. Instead, you may want to update their enrollment details to have them marked "inactive" which preserves their records.

<u>Goto</u>

Takes you to the Parent Main page where you can view student data. To return to Admin main, click the "Back to School Admin Main" button.

<u>Edit</u>

Modify existing student data for a chosen student. Update their <u>enrollment</u> status to have them automatically marked active/inactive. Add a student's photo from a file. **Note:** The student information that can be modified changes depending on the SchoolInsight modules your school has purchased.

Delete

Delete student enrollment(s) from SchoolInsight. **Note:** Once deleted, student data cannot be recovered. Instead, you may want to update their enrollment details to have them marked "inactive" which preserves their records. Enrollments in closed academic years cannot be deleted.

Merge

Remove duplicate instances of the same student by merging their data.

Transfer

Move a chosen student to a different school during the current academic year.

Contacts/Family

Manage entire families, including student's siblings, parents/guardians and corresponding relationships and custodial status.

Re-Enroll

Re-enroll a student that is currently 'inactive'. Update their enrollment information, entry date/type, etc. For more details see the <u>Re-Enroll Student</u> section.

Schedule

View/manage a student's schedule. For more details see the Scheduling Admin Guide.

Grades

View/print a student's report card grades. For more details see the Grade Reporting Admin Guide.

Historical Grades

View/manage a student's historical grades. For more details see the Grade Reporting Admin Guide.

Detailed information on the remaining links and buttons are covered in the sections that follow. **Note:** Available links differ based on which modules your school has purchased. **Note:** Some links reference SchoolInsight modules which are documented in separate Admin Guides, e.g. Attendance, Discipline.

15.1 Enrollment

Student enrollment status is determined by entry/exit dates. Their current status of active, inactive, or future is calculated based on the student's entry/exit dates. This is usually the current date, however, future dates can also be entered. Set dates in the future for changes that will then take effect automatically on the chosen date.

Note: Entry/exit dates default to the first/last day of the academic year when no dates are entered.

Enrollment status is reflected across the system, including gradebook, rosters, etc.

Student enrollment information is managed at Main > Students- Multi View > Create Student and Main > Students- Multi View or - Single View > Edit Student.

	Entry/Exit	
Entry Descriptio	n/Date:	
		•
8/25/2010		
Exit Description	/Date:	
		•
Current Status:	Active [?]	
	Entry Date:	
Enrollment: [?]	Exit Date:	
	Current Status: Active	

To make a student "inactive" provide an exit description and date. To re-enroll a student, update their entry date.

Note: Enrollment views differ based on the function being performed and your school's configuration.

15.2 Re-Enroll Student

Re-Enroll a student that has an enrollment status of "inactive".

*School: *Academic Year: : *Grade Level:	Lincoln School							
*Academic Year: : *Grade Level:	2010-11							
*Grade Level:								
	9 - Ninth Grade	-]					
Homeroom Instructor:	Type here to search for an	instruct	or. [clear]					
Advisor:	Type here to search for an	instruct	or. [clear]					
		Re-Enr	ollment Details					+
	Entry/Exit		S	chool		Day Details (FTE)		
*Calendar: Default Calendar (6, 7, 8, 9, 10, 11, 12) 💌			*Home: Lincoln Schoo		•	*Length of Day: Full Day 💌	1.0	
Entry Description/Date:			Serving:					
Re-Entry to the Same	e School - 03 🔄		Lincoln Schoo	l 	•			
5/2/2011			Claimable:	-				
Exit Description/Date:			Tuition Paid to A	nother	School:			
I								
Exit Status:	-							
Enrollment: Active [?]								
Existing Enrollments at I			Lincoln School					
Entry/Exit School		Claimable/Tuition Paid Da to Another School		Day (I	Details FTE)			
Exit: 10/5/2010 - Reaso Inactive	n Unknown Home: Lincoln S Serving: Lincoln	School (School 1	Claimable: Fuition Paid:		Length of Da	ay: Full Day (1.0)		
Re-Enroll Back								

Main >	Students -	- Multi \	View OR	- Sinale	View >	Re-Enroll
				· • · · · g. •		

Update the student's enrollment information to re-enroll them at a chosen school.

Assign a calendar and entry type/date, the student is automatically marked "active" or "future" based on the date. Select the appropriate entry type. Enter home/serving and length of day details. **Note:** For length of day other than "full day" a "Session" entry is also provided.

Use the 🔳 to create multiple enrollments for the student. See the following "<u>Multiple Enrollments</u>" section for more details.

15.3 Multiple Enrollments

Create multiple active enrollments for a single student when creating/editing a student.

In order to create concurrent overlapping enrollments the following must be true:

- Attendance must be taken in days or hours
- Cumulative length of day must equal .5, or 1.0 Note: Certain states (IL, MO) can have other values.
- · Overlapping enrollments must be at different home/serving schools
- · Overlapping enrollments must use the same calendar

	Enrollment Details	•
Entry/Exit	School	Day Details (FTE)
Entry Description/Date: Original Entry into a U.S. School - 02 8/24/2011 Exit Description/Date: Current Status: Active [?] *Calendar: Default Calendar (8, 10)	Home: First School Serving: Learning Center Claimable: Tuition Paid to Another School:	*FTE: Half Day ▼ 0.5 Session: Morning ▼ Minutes at serving school: 216 School Time Start End Regular Day: 8:05am 11:50am Half
Entry Description/Date: Original Entry into a U.S. School - 02 8/24/2011 Exit Description/Date: Current Status: Active [?] *Calendar: Default Calendar (8, 10)	Home: First School Serving: First School Claimable: Tuition Paid to Another School: .	*FTE: Half Day ♥ 0.5 Session: Afternoon ♥ School Start End Regular 12:32pm 2:59pm Half Day:

Use the 🔳 to enter multiple enrollment details. Use "Remove Enrollment" to delete extra enrollment entries that aren't needed.

Minimally provide the following: Provide entry date(s) and assign a calendar for each enrollment. Set the home/serving school for each enrollment. Set the length of day (FTE) for each enrollment.

Enter additional details, as needed.

Note: If your school uses the SchoolInsight "Secondary Attendance" mode and shows attendance in days, an additional field "Minutes at serving school" is provided. Enter the minutes that the student normally attends the serving school and it will appear as a default when entering their attendance. For schools showing attendance in hours, the default hours are automatically determined.

15.4 Create Student

Create a new student for a chosen academic year. Enter details to search for an existing student or sibling. All schools in your district are included in the search.

Create Student	
Academic Year: 2011 - 2012	
Does student already exist?	
*Last Name:	
*First Name:	
Middle Name:	
Birth Date:	
Back	•

Main > Students - Multi View > Create Student

Enter all or part of a last and/or first name to search for an existing student. Include middle name, birth date, if known.

Existing Students Matching Search Criteria					
	Name	Birthdate	School		
0	Thomas, Matthew - 9		2008-09: Lincoln School	enrollment history	
Edit/Enroll Existing Student					

If a match is found, you can view the student's enrollment history and/or modify their information. If the matching student exists at another school or in another academic year, you can enroll the student for the chosen year and school.

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C	Create Student		
A	Academic Year: 2011 - 2012		
	New Student Information		
3	*Last Name: Sanderson		
1	*First Name:		
1	Middle Name:		
	Birth Date:		
	Search for a Sibling		
	Sibling: Sanderson	[?]	
	Copy Data from Sibling	No Sibling Exists, Add Information Manually	-
•		• • • • • • • • • • • • • • • • • • •	

If a match is not found, create a new student. If they have an existing sibling, some data can be automatically copied.

No Sibling Exists: Create a new student from scratch. Fill in their basic info, enrollment details, contacts, demographic and misc info.

Copy Data from Sibling: Search for, and select a sibling. Common data will be pre-populated on the new student's page from the sibling. Address, phone number, contacts, some demographic and misc information. Review details, add new and/or modify existing information for the new student.

Save & Ad	dd Another Save Sa	ave & Add to Roster	s Back					
	Basic Info		Mailing Address		Physical Address (if different)			
*First Name:			Addr1:	Addr1:				
Preferred			Addr2:	Addr2:				
Name:	Use Preferred Nam instead of First Name	ie	Addr3:	Addr3:				
Middle Name:			City:	City:				
*Last Name:			State:	State:				
Student Number:			ZIP:	ZIP:				
Gender:			Forms Home:					
Birthdate:				1				
Phone:								
SSN:								
Picture:		Browse						

The Create Student page is comprised of several sections. The only required entries are in the top two portions containing Basic and Yearly Enrollment Info. A few fields that may need some explanation in these sections are:

Basic Info

Enter student's information, mailing address and physical address if different from mailing address. Add a student's photo from a file, if available.

Contacts can also be added on the Create Student page. Several contacts can be specified for each student.

Medical/Health Info can be entered for each student at the bottom of the page. Any custom fields that were defined during data setup will also appear here (Main > Options > Configure Student Data).

		Yearly Enrollment Info	
	*Academic Year:	2009-10 💌	
	*Grade Level:	10 - Tenth Grade	
	Homeroom Instructor:		
	Team:		
	Advisor:		
	Transportation Code:	•	
	Bus Stop:		
	Graduation Date:		_
◄			

Yearly Enrollment Info:

Academic Year: Since student's progress through grades as time passes, SchoolInsight will always show a school year when it shows a grade level. The academic year shown here corresponds to the one selected on the **Students** page.

Grade Level: The grade level of the student for the chosen academic year.

Homeroom Instructor: Assign student to a homeroom for the chosen academic year.

Advisor: Assign student to an advisor for the chosen academic year.

Transportation Code: Assign code to student to indicate walks or rides bus to school.

Bus Stop: Choose a bus stop from the dropdown box, if stops have been created.

	Enrollment Details	<u>+</u>	1
Entry/Exit	School	Day Details (FTE)	
*Calendar: Default Calendar (8, 10)	Home: First School	*FTE: Half Day 0.5 School Session: Morning	
	First School	School Time Start End	
Exit Description/Date:	Tuition Paid to Another School:	Regular 8:05am 11:30am Day:	
		Day:	
Current Status: Active [?]	11		_
Default Calendar (8, 10)	First School	*FTE: Half Day 💌 0.5 School Session: Afternoon 💌	
	Monteray Academy	Minutes at serving school: 180	
Exit Description/Date:	Claimable:	School Start End	
	Tultion Paid to Another School.	Regular 12:00pm 3:00pm	
Current Status: Active [2]		Half Day:	

Enrollment Details:

Note: Enter multiple concurrent enrollments using the \pm provided. See the "<u>Multiple Enrollments</u>" section for more details.

Entry/Exit

Student enrollment status has been redesigned. Student's active status is no longer manually entered. Active/inactive is calculated based on the student's entry/exit dates. See the "Enrollment" section for more details.

Note: Entry/exit dates default to the first/last day of the academic year when no dates are entered.

Entry Description/Date: Select an entry type for the enrollment. Enter the first day for the entry type.

Exit Description/Date: Select an exit type and enter the last day for enrollment. **Note:** A "<u>Re-Enroll</u>" link/button will be provided on the "Students" pages for students with an exit description/date.

Exit Status: Set an exit status of "Permanent" or "Temporary" to correspond to exit details.

Currently Active: Yes/No, based on entry/exit dates.

<u>School</u>

Home: Select a home school from the dropdown box. A home school is where a student resides and reports attendance. **Note:** If a student's home school is the SchoolInsight school, it will be shown as "Home" on Students - Single View.

Serving: Select a serving school, if needed. Serving schools are where the student actually attends classes.

Day Details (FTE)

• FTE: Select the student's normal FTE, full or half school days, or choose "Other" to set fractional FTE. Note: FTE defaults to 1.0 for "Full Day" and 0.5 for "Half Day". The sum of FTE for all enrollments must equal 0.5 or 1.0.

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- School Session: Select the student's normal school day.
- **Minutes at serving school:** Enter the number of minutes/hours the student attends the serving school. **Note:** This field is available for schools using the "Secondary Attendance" mode, using a time calculation for attendance and displaying attendance in "Days".
- School Time: Enter individual school day start/end times for students with special schedules. For multiple enrollments, set the start/end times on the home school to assure accurate attendance records. Note: This will override the school's <u>Attendance Options</u> defaults for the student.

15.4.1 Demographics

If the school has purchased Core Student Management, you will be able to capture a large amount of data for each student, including ethnicity/race, lunch program, IEP/504, ELL and Homeless data, etc.

		Demographics		Misc Info	-
	Ethnicity/Race:	Not Hispanic or Latino	Birth Place:		
		Asian Black or African American	Mother's Maiden Name:		
		White American Indian or Alaska Native	Parent's Marital Status:		
	Disabladi	Native Hawaiian or Other Pacific Islander	Lives With:		
	Disability:		Disable parent/student web access		
	Low Income:	YV	Previous School:		
	Lunch Program:	Free 🔽 🗹 Direct Certified	State ID Number:		
	English Proficiency (LEP):		Enrolled Previous Year:		
	Primary Home Language:	•	Graduating Class:	2012	
	Native Language:	•	District Entry Date:		
	Title 1:		Taken:	_	
	Title 1 Program:		Student Tested:		
	Migrant:		Reason for not Testing		
	Has IEP:		State Assessment:		
	IEP Accommodation:		Testing School ID		
	SES:		Locker:	Auto-Assign Locker by Grade Level	
	Section 504:				
	504 Accommodation:		Class Rank:	Y	
	Century 21:		Academic Track:		
	Homeless:		Graduation Requirement:	2010-2014 High School -	
	Career Tech Ed:			×	
•	Reading 1st		Notes:		-

Main > Students - Multi View > Create Student

15.5 Edit Student

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Modify existing information for a chosen student.

Duon					
	Basic Info		Mailing Address		Physical Address (if different)
*First Name:	Mandy	Addr1:	1234 Elm Street	Addr1:	
Preferred		Addr2:		Addr2:	
Name:	Use Preferred Name instead of First Name	Addr3:		Addr3:	
Middle Name:		City:	Watertown	City:	
*Last Name:	Jones	State:		State:	
Student Number:	5876	ZIP:	60666	ZIP:	
Gender:	F	Mail Forms	Yv		
*Birthdate:	January 🔽 1 💌 1999	- Home.			
Phone:	555-123-1234				
SSN:					
Picture:	Change Student Bioture				
	Change Student Picture				

Main > Students - Multi View > Edit	
Main > Students - Single View > Edit Student	t

Modify student information, update their Basic Info, Yearly Enrollment Info, Enrollment Details, Demographics, and/or other Misc Info and Custom Fields.

Note: You can also choose to update home phone number and address for contacts and siblings in the student's family.

Change a student's picture, or clear a picture if a replacement doesn't exist.

Note: Use <u>Promote/Transfer Students > Promote</u> when the student moves to the next academic year.

Update a student's enrollment information to change their active/inactive status. See the "<u>Enrollment</u>" section for more details.

Add multiple enrollments for students attending a different serving school. See the "<u>Multiple</u> <u>Enrollments</u>" section for more details.

15.6 Promote/Transfer Students

Manage student enrollment for many students at once. Promote students to the next grade level. Transfer students to another school.

Main > Students - Multi View > Promote/Transfer Students

	Promote/Transfer Students							
	Current Schoo	I: First School	Academic Year: 2011-12					
		C Promote/Retain students within a building						
	Type of Move:	O Promote students to a different building						
		$\ensuremath{\mathbb{C}}$ $% \ensuremath{\mathbb{C}}$ Transfer students to a different building in the current year		-				
•								

Promote/Retain students within a building: At the end of an academic year, promote students to the next grade level. Also use this to enroll students in summer school and to retain students who will not be advancing a grade level.

Promote students to a different building: Promote students to the next grade level and simultaneously move them to another school. For example, promote 5th graders into their middle school or promote 8th graders into their high school within your district.

Transfer students to a different building in the current year: Move students from one school to another after the start of a school year. Update student enrollment data with unique exit/entry dates. **Note:** This can also be done for an individual student from Main > Students - Single View > Transfer Student and Main > Students - Multi View > transfer.

15.6.1 Promote Students

Each year, admins will promote students to the next grade level. This can be easily done for all students at one time.

	Promote/T	ransfer Students		
	Current Schoo	I: First School	Academic Year: 2011-12	•
		C Promote/Retain students within a building		
	Type of Move:	O Promote students to a different building		
		$\ensuremath{\mathbb{C}}$ $% \ensuremath{\mathbb{C}}$ Transfer students to a different building in the current year		-
•				

Main > Students - Multi View > Promote/Transfer Students

Two options are provided for promoting students. Promote students within the same school, or promote them to another school within your district.

"Promote students within a building" is primarily used to promote students to the next grade level for the upcoming school year. For example, promote the 3rd graders to 4th grade. It can also be used to enroll students in summer school or retain students that are not advancing a grade level. See the following section "Promote Within Building" for more details.

Promote students to a different building" is also used to promote students to the next grade level, however, in this case, students are moving to a different school. For example, 5th graders moving to middle school.

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See the following section "Promote to Different Building" for more details.

15.6.1.1 Promote Within Building

Promote students to the next grade level within the same school. Promote all students at the school, or promote by grade level, as needed. Make sure to have the current academic year and appropriate grade level(s) selected. Also use this to enroll students in summer school and to retain students that aren't advancing a grade level. **Note:** For students who are graduating, don't promote them to the later academic years. In this way their data will be preserved, but they won't be active in the later academic years. If they'll be enrolling in another school in your district, use "Promote to Different Building" to promote and move them to their new school.

Main > Students - Multi View > Promote/Transfer Students Type of Move: Promote/Retain students within a building

Promote/Trar	nsfer Students
Current School: L Current Grade Le Promote Studen	incoln School Current Academic Year: 2010-11 vel: All Home School: Self
Type of Move: C	Promote/Retain students within a building Promote students to a different building Transfer students to a different building in the current year
	Enrollment Data for the New Academic Year
Next Academic Year:	2011-12 🗹 Allow promote to any existing academic year
Next Grade Level:	Increment by 1 Grade Level
Homeroom Instructor:	Type here to search for an instructor.
Advisor:	Type here to search for an instructor.
Exit Date for Current Year:	
Exit Type for Current Year:	
Entry Date for Next Year:	
Entry Type for Next Year:	
*Length of Day:	Full Day 💌
Copy Bus Route Information?	□ Note: Bus Information will only copy if the stops exist in the Next Academic Year.
(<u> </u>	

Current Academic Year: Current academic year, from which the student will be promoted.

Current Grade Level: Grade level of the student in the current academic year.

Home School: Select the students current home school.

Enrollment Data for the New Academic Year:

Next Academic Year: Year for the updated enrollment data. This is usually the next academic

year, however you can also promote to any year if needed. **Note:** You need to allow promote to any year in order to promote students to a summer academic year.

Next Grade Level: Choose to increment by 1 grade level or keep student at current level. **Note:** For summer school you'll probably want to keep them at the same grade level.

Homeroom Instructor: Assign student to a homeroom for the next academic year.

Advisor: Assign student to an advisor for the next academic year.

Exit Date for Current Year: Default is blank for the current academic year. Select a date, as needed.

Exit Type for Current Year: Default is blank, select an exit type for the current year, as needed.

Entry Date for Next Year: Default is blank for the new academic year. Select a date, as needed.

Entry Type for Next Year: Default is blank, select an entry type for the next academic year, as needed.

Length of Day: Specify full or half school day for the chosen students.

Copy Bus Route Info: Bus route/stop information will be copied if stops exist for the next academic year.

R	eset Values of the Following Field	ls (Unchecked Fields will be Co	bied) 🖃
504 Accommodation	Academic Track	Acquire Use and Knowledge Skills	Addressing Needs Related to Domestic Violence
Advisor	□ Aquire Use and Knowledge Skills	 Assistance with Participation in School Programs 	Before-School, After-School, Mentoring, Summer Programs
Career Tech Ed	Century 21	Claimable for State Aid	Class Periods Provided Per Week
Clothing to Meet a School Requirement	Content Area Tutoring	Coordination between Schools and Agencies	Counseling

Check which fields to have reset during the promote. Checked fields are reset to null/blank. Unchecked fields will have their values copied to the next academic year.

Click the safet choosing reset fields to save setting preferences for additional promotes. **Note:** This will also update the "Reset Values" field on the <u>Configure Student Data</u> page.

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Reset Values of the Following Fields (Unchecked Fields will be Copied)

Save "Fields to Reset" preferences?

		Students to Promote		
Promote?	Current Grade Level	<u>Name</u> △	Student Number	Active
	12	Arnought, Adam	10001	true
	12	Austin, Jane	1072	true
Already Promoted	9	Austin, Tom	1070	true
	12	Baker, Bob B.	1074	true
•	12	Bradey, Bill	10322	true

Promote?: Select individual students to promote, or select all at the top of the column.

15.6.1.2 Promote to Different Building

Sometimes admins will need to promote students to the next grade level into a different school. For example, 5th graders moving to middle school. This can be done for one or many students. Make sure to have the current academic year and grade level selected.

Main > Students - Multi View > Promote/Transfer Students Type of Move: Promote students to a different building

	Promote/T	ransfer Stud	lents	•
	Current Schoo	ol: Lincoln Schoo	Current Academic Year: 2010-11	
	Current Grade	Level: All	Home School: Self	
	Promote Stud	dents Back		
		C Promote/R	etain students within a building	
	Type of Moye:	O Promote st	udents to a different building	
	Type of Move.	O Transfer st	Idents to a different building in the current year	
			Enrollment Data for the New Academic Year	
	Next School:		Gradeschool Promote to any school	
	Next Academic	c Year:	2011-12 Allow promote to any existing academic year	
	Next Grade Le	vel:	Increment by 1 Grade Level	
	Homeroom In:	structor:	Type here to search for an instructor.	
	Advisor:		Type here to search for an instructor.	
	Exit Date for C	urrent Year:		
	Exit Type for C	urrent Year:		
	Entry Date for I	Next Year:		
	Entry Type for I	Next Year:		
	*Length of Day	y:	Full Day 💌	
	Copy Bus Rou	ite Information?	□ Note: Bus Information will only copy if the stops exist in the Next Academic Year.	•
•				

Current Academic Year: Current academic year, from which the student will be promoted.

Current Grade Level: Grade level of the student in the current academic year.

Home School: Select the students current home school.

Enrollment Data for the New Academic Year:

Next School: Select the school in your district to promote students into. Admins can promote students to schools with promotion permissions. Promotion permissions can be assigned by either the receiving school or by the district at Main > Options. District Admins have the additional option to allow promotion to any school in the district.

Next Academic Year: Year for the updated enrollment data. This is usually the next academic year, however you can also promote to any year if needed.

Next Grade Level: Choose to increment by 1 grade level or keep student at current level.

Homeroom Instructor: Assign student to a homeroom for the next academic year.

Advisor: Assign student to an advisor for the next academic year.

Exit Date for Current Year: Default is blank for the current academic year. Select a date, as needed.

Exit Type for Current Year: Default is blank, select an exit type for the current year, as needed.

Entry Date for Next Year: Default is blank for the new academic year. Select a date, as needed.

Entry Type for Next Year: Default is blank, select an entry type for the next academic year, as needed.

Length of Day: Allows you to specify full or half school days.

Copy Bus Route Info: Bus route/stop information will be copied if stops exist for the next academic year.

R	eset Values of the Following Field	ls (Unchecked Fields will be Co	pied)
504 Accommodation	Academic Track	Acquire Use and Knowledge Skills	Addressing Needs Related to Domestic Violence
Advisor	□ Aquire Use and Knowledge Skills	 Assistance with Participation in School Programs 	Before-School, After-School, Mentoring, Summer Programs
Career Tech Ed	Century 21	Claimable for State Aid	Class Periods Provided Per Week
Clothing to Meet a School Requirement	Content Area Tutoring	Coordination between Schools and Agencies	Counseling

Check which fields to have reset during the promote. Checked fields are reset to null/blank. Unchecked fields will have their values copied to the next academic year.

Click the after choosing reset fields to save setting preferences for additional promotes. **Note:** This will also update the "Reset Values" field on the <u>Configure Student Data</u> page.

Note: If a student is also moving to another school, some fields may not be copied.

Reset Values of the Following Fields (Unchecked Fields will be Copied) \pm

Save "Fields to Reset" preferences?

		Students to Promote		
Promote?	Current Grade Level	<u>Name</u> △	Student Number	Active
•	12	Arnought, Adam	10001	true
•	12	Austin, Jane	1072	true
Already Promoted	9	Austin, Tom	1070	true
	12	Baker, Bob B.	1074	true
•	12	Bradey, Bill	10322	true

Promote?: Select individual students to promote, or select all at the top of the column.

15.6.2 Transfer Students

Easily transfer one or more students from one school to another in the current school year.

Main > Students - Multi View > Promote/Transfer Students

	Promote/T	ransfer Students		_
	Current Schoo	I: First School	Academic Year: 2011-12	
		C Promote/Retain students within a building		
	Type of Move:	O Promote students to a different building		
		$\ensuremath{\mathbb{C}}$ $% \ensuremath{\mathbb{C}}$ Transfer students to a different building in the current year		-
₹				

"Transfer students to a different building" allows you to easily move students from one school to another in the current academic year. See the following section "Transfer to Different Building" for more details.

15.6.2.1 Transfer to Different Building

Easily move students from one school to another in the current academic year. Transfer students to a different school and close their existing enrollment.

Main > Students - Multi View > Promote/Transfer Students Type of Move: Transfer students to a different building in the current year

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	Promo	te/Transfe	r Stu	dents				
	Current	School: First S	chool			Acade	emic Year: 2011-12	•
	Current	Grade Level:	8 - Eigl	nth Grade 💌		Home	School: Self	⊡
	Transfe	Back						
	Type of I	Nove:		 O Promote/Retain O Promote student Transfer student 	students within a b ts to a different buil ts to a different buil	uilding ding ding in the current year		
	*Destina	ation School		Monteray Academ	y 💌			
	*Exit Dat	e for Current S	School:	6/7/2012				
	Exit Type	o for Current S	chool:					
	*Entry D	ate for Next Sc	hool:					
	Entry Typ	pe for Next Sch	iool:			•		
	*Length	of Day:		Full Day 💌				
1			Stur	lents to Move				
	Move?	Current Grade Level	3100	Name	Student Number			
		8	Adams	s, Amy	1000			
		8	Chen,	Jessie	0006			
4		8	Gonza	les, Roberto "Robby"	1036			▼ ►

Current Academic Year: Current academic year, from which the student will be promoted.

Current Grade Level: Grade level of the student in the current academic year.

Home School: Select the students current home school.

Destination School: Select the school for the student(s) transfer.

Provide exit date/type for the current school and entry date/type for the destination school. Entry/exit dates do not have to match.

Length of Day: Specify full or half school day for the students being transferred.

Move?: Select individual students to transfer, or select all at the top of the column.

15.7 Mass Edit

To easily assign information or fix mistakes on large numbers of students at a time, you can use the "Mass Edit" page. **Note:** Use the "Clear existing value" checkbox to create blank values for the items/students selected.

Main > Students - Multi View > Mass Edit

Mass Edit			
School: Lincoln School			
Academic Year: 2008-0	9 🗸		
Grade Level: All	T		
Save Back			
	Data to Edit		Data to Edit
Active:		Race:	
Grade Level:		Disabled:	
Homeroom:	•	Disability:	_
Advisor:		Low Income:	
Entry Type:			
Entry Date: (first day at school)		Lunch Program:	Note: Only students with no existing lunch program will be updated.
Exit Type:		English Proficiency:	
		Primary Home	
(last day at school)	•	Migrant:	
Enrollment Type:		Has IEP:	
	Serving School:	IEP	
Claimable for State Aid:		Accommodation:	
Tuition Paid to Another		SES:	

Set the entry date, grade level, homeroom teacher, etc. for large blocks of students. It's also useful when setting the exit type for each year.

Note: Since SchoolInsight separates students by academic year, when promoting students use the "Promote Students" page and **NOT** the "Mass Edit" page.

15.8 Merge Students

Any data entry inconsistencies can be "cleaned-up" with the "merge" link located next to a student's name. For instance, if the same student has multiple entries (John Smith and John M. Smith) the data files can be merged into a single student. If you wanted to merge the "John Smith" student into the information contained in "John M. Smith," you would click the merge button for John Smith and then select John M. Smith as the "Student to receive data."

Main > Students - Multi View > merge

	Merge Duplicate S	tudents	
	Student to merge:	Austin, Jane (Student Number: 123)]
	Student to receive data:		
	Merge Back		· •
∎		•	ſ

Note: Use with caution. Once student data is merged, it cannot be separated.

15.9 Edit Contacts

Modify contact information for a chosen student. Update names, phone numbers, relationship details, etc., as needed. **Note:** Update email addresses at <u>Main > Email Addresses</u>.

Edit Contacts			
Student: Austin, Jar	ne		
Save Back			
		Contacts	
Relationship:	Mother	Father	Other/Unknown
Title:		•	
First Name:	Melissa	Tony	Steve
Last Name:	Austin	Austin	Mason
Home Phone:	555-555-5555	555-555-5555	
Work Phone:			
Cell Phone:			
Other Phone:			
Address 1:	123 Way	123 Way	
Address 2:			
City:	Aurora	Aurora	
State:			
Zip:	60134	60134	
Employer:	PreSchool	Havester Inc.	
Ninte n.	A	A	
NOLES.	V	V	
	Relationshi	ip details for Austin, Jane	
Custodial Status:	Custodial Parent/Guardian 💌	Custodial Parent/Guardian 💌	Other 💌
Prevent All Contact:			
Web Access:			
Receives Mail:			
Receives Email:			
Can Pickup Student:			
	1	1	

Main > Students - Multi View > Edit Contacts

15.10 Contacts/Family

If your school has purchased Core Student Management, you can link family members/contacts and update their common information once. Assign contacts for a chosen student. Specify relationships, such as, parent, guardian, doctor, emergency contact, etc. Manage contact's custodial status, relationship and web/mail access. Add more students to link family members, contacts and assign relationship/custodial status details. Assign student properties to all family members, as appropriate.



Family				Student Proper	ties		
Student	Contact	N	ame:	J	ane Austin (11)		
Jane Austin (11) Meliss	a Austin	Ac	ddress:	1	23 Way	Phone: 5	55-555-5555
Tony A	ustin			A	Aurora, IL 60134		
Sibling(s): Steve	Mason	E	mail: hudeet Dectel	Ja	austin@au.com <u>edit ema</u> Tagliah	<u>ii delete emaii loo</u>	lins
Tammi Austin (A) -		. La	anguage: BET/	. E	english		
Tom Austin (8)	ency Contact Or	niy:					
Meiani	e smiui	E	dit Propertie	s Merge	Contacts		
Add Student Add Cont	act						
		All contacts	related to Ja	ane Austin			
Custodial Status Relationship	Name	Phone Number	s Address	Employe	er Options		
Custodial Parent/Guardiar Mother	Melissa Austin	(h) 555-555-555 (c) 555-123-456 maustin@au.cor	5 123 Way 7 Aurora m IL, 60134	PreSchool	Web/Records Access Receives Mail Receives Email Can Pickup Lives With Disciplinary Contact	edit delete men	ge
Custodial Parent/Guardiar Father	Tony Austin	(h) 555-555-555 (c) 555-123-987 taustin@au.com	5 123 Way 6 Aurora IL, 60134	Havester Ir	nc. Web/Records Access Receives Mail Receives Email Can Pickup Lives With Disciplinary Contact	edit delete men	ge
None	Steve Mason					edit delete mer	ge
Uncle							

Click on any Student or Contact name in the upper, left box to view their corresponding information in the "Properties" box to the right. Modify their information, as needed. Additionally, contact details are shown for students, relationship details are shown for contacts in the table below their properties. **Note:** You can click on any name in the table to view their properties.

Note: Siblings from other schools in your district can also be viewed. Their address and home phone can be updated when changing student data for a sibling at your school.

Add Student

Add another student to the family. **Note:** At least one contact, with a custodial status of either "Custodial Parent/Guardian" or "Non-Custodial Parent", must exist before adding siblings to the family.

Add Contact

Add a contact to the family. **Note:** Once a contact has been created, a link to edit contacts will appear on the "<u>Students</u>" page. **Note:** Email addresses for parent/contacts can be added here or at <u>Main > Email Addresses</u>.

Edit Properties

Modify student or contact data, based on which person is selected. Change phone, address, relationship details. Apply changes to other family members for common information.

Add/Edit/Delete Email

Create a new email account for the student or contact with an initial password. A different parent portal language can be set for each individual email address, as needed. You may choose to send a welcome email containing login and password information. Edit or delete an existing email for the chosen student or contact. Edit email to merge two email accounts. For more details see the "<u>Merge Accounts</u>" section.

Note: Email addresses can be also be managed at Main > Email Addresses.

Logins

View a history of successful/failed logins for a chosen student or contact. For more details see the " Login History" section under "Login".

<u>Edit</u>

Modify either student or contact data, based on which person is selected. Also, update phone and address changes for siblings/contacts. **Note:** You can also modify personal information for contacts from <u>Main > Students > Edit Contacts</u>.

Delete

Remove a relationship for the chosen student. **Note:** This only removes the relationship between the contact and the chosen student. It does not remove the contact from the family until they are deleted from all students in the family.

Note: Removing all contact relationships for a student removes the student from the "Family".

<u>Merge</u>

Combine duplicate contacts into one. Note: Use caution when merging as this cannot be undone.

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15.10.1 Add Contact

Assign contacts for the chosen student for a chosen academic year. Choose from existing contacts or create new. Specify parents, guardian, doctor, emergency contact, etc. Assign custodial status and relationship details for the student and this contact.

									a
	Add Contact I	to Family	Ý					×	
C Find an existing contact									
 Create a new contact 									
Contact Prope	rties								
First Name:	.ast.								
Address 1:									
Address 2:									
City, State Zip:									
Home Phone: Wor	k Phone:								
Other Phone: Cell	Phone:								
Employer:									
Notes:		<u>^</u>							
	Add this co	ontact to st	tudents						
Add Student Custodial Status	Relationship	Prevent Contact with Student	Web/Records Access	Receives Mail	Receives Email	Can Pickup	Lives With	Disciplinary Contact	Primary Care Provider
May Jones ()	Aunt					•			
Add Cancel									

Main > Students - Multi View > Contacts/Family > Add Contact

Create a new contact or add an existing contact to the family. Add address, phone when creating a contact, or later <u>edit student properties</u> and automatically update common information. **Note:** Add contact email addresses at <u>Main > Email Addresses</u> or from the "View Family" page.

Assign custodial status/relationship details between this student and the contact.

Check boxes to allow contact's access to the student and their information. **Note:** If "Prevent Contact with Student" is checked, "Prevent Contact" will be shown on the Students pages in red.

Note: Once a contact has been created for this student, additional students can be added to the family from <u>Main > Students > Family/Contacts</u>.

Note: Once a contact has been created, a link to <u>edit contacts</u> will appear on the "<u>Students - Multi</u> <u>View</u>" page.

15.10.2 Add Student

Add another student to the family. Assign student relationships for existing contacts.

	Add Student to Family										x
Sear	A ch: Type h	Add Student to Family	21								
			Add this s	tudent to	contacts						
Add	Contact	Custodial Status	Relationship	Prevent Contact with Student	Web/Records Access	Receives Mail	Receives Email	Can Pickup	Lives With	Disciplinary Contact	Primary Care Provider
V	Melissa Austin	Custodial Parent/Guardian 💌	Father 💌		•	V	V	~		•	
•	Tony Austin	Custodial Parent/Guardian 💌	Father 💌			•	V	•		~	
•	Steve Mason	Other 💌	Uncle	•							
V	Melanie Smith	Emergency Contact Only	Grandmother					~			
Save	Cance	el									



Search for a student to add to this family.

Check the contacts to add to this student. Assign the custodial status, relationship and access to the student and their information. **Note:** Details can be different for each student/contact combination.

Note: Only existing students can be added to the family. To add a new student, first <u>create the</u> <u>student</u>.

15.10.3 Edit Student Data

Add or modify student address and phone. Apply the information to other family members as appropriate. Modify custodial status, relationship details, web access, for the student's contacts.

Can Pickup

Main > Students - Multi View > Contacts/Family > [select student] > Edit Properties

Check other family members to apply the same address/phone changes.

Make necessary changes to the custodial status/relationship/web access for the chosen student using the dropdown or check boxes.

Note: Options for the check boxes change based on the chosen custodial status.

15.10.4 Edit Contact Data

Modify contact data, custodial status/relationship/web access details for a chosen contact. Also, update address and phone for siblings/contacts.

Edit Contact Data									x	
Contact Properties					Also Update Address and Hon Phone for:					
Address 1: 123 Way				Students						
Address 2				-	Ally Austin					
		60134		-			🗆 🗆 Ja	ane Aus	tin	
City, State /		00134					🗆 🗆 Та	ammi A	ustin	
Home Pho	ne: 000-000-0000	Work Phone:						om Aus	tin	
Other Phor	ne:	Cell Phone: 555-123-4567					Conta	icts		
Employer:	PreSchool			Melissa Austin						
Notes:				L Tony Austin						
								teve Ma	ison	
Student	Custodial Status	Relationship	Prevent Contact with Student	Web/Records Access	Receives Mail	Receives Email	Can Pickup	Lives With	Disciplinary Contact	Primary Care Provider
Jane Austin (12)	Custodial Parent/Guardian 💌	Mother						•		
Tom Austin (9)	Custodial Parent/Guardian 💌	Father 💌			•	7				
Save C	Cancel									

Main > Students - Multi View > Contacts/Family > [select contact] > Edit Properties

Make necessary changes to the custodial status/relationship/web access for the contact's student(s) using the dropdown or check boxes.

Check other family members to apply the same address/phone changes.

Note: Options for the check boxes change based on the chosen custodial status.

15.11 Student's Rosters

View all classes for which a student is on a roster. Add the student to additional rosters and/or transfer them between classes, as needed.

Student's	Rosters						
Student: Aust	tin, Jane						
Academic Ye	ar: 2009-10				. 1		
Add Studen	t to Rosters	Transfer Averages	Copy S	Schedule Ba	ack		
Instructor		Title		Grading Periods	Schedule	Options	
Birdman J	Geometry Course Num Section: 1 Subject Area	: 211 : Mathematics		Q1 (active) Q2 (active) Q3 (active) Q4 (active)	1 MTWTHF	Weight: 1 Take Attendance	<u>edit</u> <u>delete</u> transfer
Birdman J	Biology Course Num Section: 1 Subject Area	n: 127 : Science		Q1 (active) Q2 (active) Q3 (active) Q4 (active)	Inactive on Roster	Weight: 1 Take Attendance	edit delete transfer
Chase B	Health Course Num Section: 1 Subject Area	n: 215 : Health / Physical Ed	ucation	Q1 (active) Q2 (active) Q3 (active) Q4 (active)	Q1: 3 MTWTHF Q2: 3 MTWTHF	Weight: 1 Take Attendance	<u>edit delete</u> <u>transfer</u>
Jones K	Chemistry L Course Num Section: 1 Subject Area	<u>ab</u> 1: 101-L : Science		Q1 (active) Q2 (active) Q3 (active) Q4 (active)	4 MTWTHF	Weight: 1 Take Attendance	<u>edit</u> <u>delete</u> transfer
Rutherford A	Chemistry Course Num	n: 101		Q1 (active) Q2 (active)	2 MTWTHF	Weight: 1 Take Attendance	edit delete

Main > Students - Multi View > Rosters

Manage individual student rosters from this page, or manage class rosters from "<u>Main > Classes ></u> <u>Roster</u>".

Add Student to Rosters

Add the chosen student to existing class roster(s).

Transfer Averages

Modify student's averages and/or weights for transferred classes. Values chosen will affect the student's overall grade.

Copy Schedule

Copy one student's schedule to other students.

Clear Schedule

Remove a student from one/many class roster(s) in the chosen academic year. **Note:** Must be done prior to start of the academic year or prior to the first day of the student's enrollment in the class. Use caution as this cannot be undone.

<u>Edit</u>

Modify the student's enrollment information. For more details see the Classes "Edit Roster" section.

<u>Delete</u>

Delete students from a chosen class roster. Note: Scores and comments will also be deleted.
Instead, you may want to update their enrollment details to have them marked "inactive" which preserves their records.

Transfer

Move a chosen student between existing classes. Transfer their grades with them. **Note:** The class grading scale must calculate averages in order to transfer students. View more details on transferring students in the "<u>Transfer Student</u>" section.

15.11.1 Edit Student's Roster

Update a student's enrollment information for a chosen class.

Note: Student roster enrollment, active/inactive, is calculated based on the student's entry/exit dates.

Main > Students ·	- Multi	View >	Rosters >	Edit
-------------------	---------	--------	-----------	------

	Edit Roster		_						
	Student: Allen, Tom Class: 2012-13 Social S	Studies (Section 1, M. Million)							
	Roster Number:	2							
	Roster Enrollment: [?]	Entry Date: [choose gp] Choose Grading Period Exit Date: Q1 Current Status: Active Q2	X						
	Transferred Out:								
	Notes:	Q4 OK Cancel	I I						
	Note: Click <u>here</u> to edit general student info (name, student number, phone, etc.).								
•	Save Back		▼ ▶						

Roster Number: Provide a roster number for the student used for tracking and sorting rosters.

Roster Enrollment

Student current status on rosters is determined by the entry/exit dates. Enter dates or choose grading periods. Future dates can also be entered. Set dates in the future for roster changes that will then take effect automatically on the chosen date. **Note:** Entry/exit dates default to the first/last day of the academic year when no dates are entered.

- Entry Date: Indicate when the student started in the class.
- Exit Date: Indicate when the student left the class. Note: If the student was transferred out of this class, their transfer date will appear as the exit date.
- Choose GP: Choose grading periods to have dates filled in automatically. The "First Date" of the earliest chosen grading period and the "Last Date" of the last chosen grading period will be entered respectively as the Entry/Exit dates.

Current Status: Active, Inactive, or Future, based on roster enrollment entry/exit dates.

Transferred Out: Indicates if the student transferred out of this class. When transferred is yes, students are marked inactive and the transfer date is shown as the "Exit Date". **Note:** If transfer is yes, student's grades will not appear on progress reports, report cards or transcripts for the class they transferred from. If needed, grades must be manually entered, or to view existing grades, change "Transferred Out" to "No". The student will then appear on the Instructor's "Scores/Comments" page for both classes. Use these steps to also "undo" a transfer. Once the student is active again, delete

them from the roster of the class they transferred to.

15.11.2 Copy Schedule

Copy a student's schedule/rosters to one or more students. This is useful when many students share the same schedule.

Copy Student Schedule										
Student: Austin, Jane - 10 Search: Jane Austin (ex: 7 j smith) [?] Academic Year: 2009-10										
Current Schedule/Rosters										
	Instructor		Class		Schedule					
		Lunch 2, Section 2			5 MTWTHF					
	Birdman Jay	Geometry, Section 1			1 MTWTHF					
	Birdman Jay	Biology, Section 1								
	Chase Brian	Health, Section 1			Q1-Q2: 3 MTWTHF					
	Chase Brian	Phys Ed, Section 4 - B	asketball & Tennis		Q3-Q4: 3 MTWTHF					
	Jones Karen	Chemistry Lab, Sectio	n 1		4 MTWTHF					
	Rutherford Ann	Chemistry, Section 1			2 MTWTHF					
•	Rutherford Ann	Study Hall, Section 1			7 MTWTHF					
•	Smith Matt	English, Section 1			6 MTWTHF					
	Smith Matt	Phys Ed, Section 1								
Grade L	evel: 10 - Tenth Grad	le 💌	ŀ	łomeroom: All	•					
			Copy to Student(s)							
🗆 Bal	ker, Bob B.	Martin, Emily		Smith, Amand	a					
🗹 Jones, Hector 🗌 Moore, Emr				🛛 Wade, Robert	R					
🗆 Lor	ng, Michael	Moore, Melissa	3	🗖 Woodman, Ta	mmara					
Mar Mar	nning, Fred	🗖 Sanders, Susa	in							
Copy Back										

Main > Students - Multi View > Rosters > Copy Schedule

Student: Search for a student whose schedule you wish to copy.

Academic Year: Choose a year to view/copy the student's schedule. Note: Schedules cannot be copied when using automated scheduling in a future year.

Current Schedule/Rosters: Select which classes on the student's schedule/rosters to copy. **Note:** Classes for which the student is 'inactive on the roster' still appear, but their schedule information is blank.

Copy To Student(s): Select to which students the schedule will be copied. Narrow student selection by grade level and/or homeroom, as needed. **Note:** Chosen classes will be copied to all grading periods for selected students.

15.11.3 Transfer Student

Easily move students between classes. Transfer students out of a class for which they're currently on the roster. Add them to the roster of a new class. Transfer gradebook averages to the new class. **Note:** Classes must have the same grading scale and grading periods in order to transfer students. If your school uses report cards, the classes must also use the same assessment list.

Note: Transfer student only transfers a grading period average score. To move a student to another class roster and copy their grades for matching assignments, use <u>Main > Classes > Roster > Copy</u>.

Main > Students - Multi View > Rosters > Transfer

-OR-

Transfer Student								
Student: Austin, Jane Class: 2008-09 127-Biology, Section 1, Birdman 6/19/2009	1							
Gradebook Data	Report Card Data	a Transfer Date						
Grading Period Average Weight in Copy New Progress Class Report [?] Comments	Image: Transfer report card grades Image: Transfer report card comments	rrd *Last Day (in old class): ■						
Q1 92 100 🔽		(in new 1/5/2009 class):						
Q2 96.67 90 🔽								
Q3 🗌 🗌								
Q4								
Transfer Back								
Transfer Student to:		Details						
C 2008-09 6th Grade English, Section 3		Different Report Card Grading Scales						
C 2008-09 Lunch 1, Section 1		Student Already Enrolled Different Report Card Grading Scales						
C 2008-09 Reading								
© 2008-09 127-Biology, Section 2, Birdman								
O 2008-09 6th Grade English Section 1 Bird	lman							

Main > Classes/Sections > Roster > Transfer

Grading Period / Grade / Weight:

The current gradebook average(s), per grading period, will be displayed. For closed grading periods, a weight of 100% will automatically be entered. For active grading periods, you'll need to enter a weight. The weight should be chosen to most accurately reflect the student's current performance in the class.

For example: If the transfer is happening at the middle of the grading period, and roughly half of the class grades are entered, you'll probably want to use a weight of 50%. The student's average will then be transferred to the new class and count for 50% of the total grade for the remainder of the grading period.

Initially, the student's average will transfer over exactly. Then, once other assignments get graded, their Total grade will be calculated by applying the transfer weight to the transfer average, and the

remaining weight to all post-transfer scores. For more details on transfer average calculations, see the "Transfer Average Explanation" section.

Transferred averages will appear on the Instructor > Scores/Comments page for the grading periods in which the transfers were made. The transfer average will also show on progress reports. To view the transferred grade details go to <u>Main > Students > Rosters > Transfer Averages</u>.

Report Card Data:

If the subject is on a report card, choose to also transfer report cards grades and/or comments.

Transfer Dates: Enter the last day the student will be in the class. The first day in the new class will be automatically calculated using the school's academic calendar.

Transfer

Transfer students from one class section to another section of the same class: (ex: Biology, section 1 to Biology, section 2) or from one class to a similar class: (ex: Algebra to 8th Grade Math)

- Transfer the student and the gradebook average from one class to another.
- Assign weights to maintain the student's class performance in the new class.

Note: Students will continue to show as "enrolled" in transferred classes to preserve their enrollment history.

Note: The student and class roster pages will show the transfer information. However, on other pages, you will NOT see the student for the classes they've transferred from. (Attendance, Scores/ Comments, Progress Reports, etc).

Certain conditions may exist that will not allow for student to transfers between classes:

- Grading Scale Mode Does Not Match: Percentages vs Points

- Different Grading Periods: Q1-Q4 to Fall-Spring: Grading periods must, at a minimum, contain the same periods, however, additional periods are allowed.

- Different Report Card Grading Scales: Classes must use the same grading scale. If the class grading scale is used on the report card, the scale grades and min % or points must be the same for both classes.

- Different Report Card Assessment Lists: Scores and Comments vs any other
- Student Already Enrolled: Student on the class roster, even if previously transferred out

Note: If you can't transfer to the desired class, go to <u>Students > Rosters > Edit</u> and manually transfer the student by setting the "Transferred Out" field.

Note: To move a student from one class to a completely different kind of class: (ex: Chemistry to Painting - basically add/drop), go to <u>Classes > Rosters > Copy</u>. Copy the student to the new class, then edit their roster enrollment details to have them marked "inactive" in the old class while preserving their grade.

15.11.4 Transfer Averages by Student

Modify transfer averages and weights for the chosen student. View current transfer averages/weights for all classes from the student's roster. Change averages and/or weights, as needed, to accurately reflect student's performance in class(es).

	Transfer Averages									
	Student: Austin, Jane Academic Year: 2008-09									
	Save Back									
	Class	Grading Period	Average	Weight [?]						
		Q1								
	Lunch Section: 1	Q2								
		Q3								
		Q4								
		Q1	92	100						
	Biology	Q2	96.67	90						
	Instructor: Jay Birdman	Q3								
		Q4								
		Q1								
	Spanish Exploratory	Q2			-					
∢				•						

Main > Students - Multi View > Rosters > Transfer Averages

Updates will appear in the "Transfer Average" column on the Instructor's "Scores/Comments" page. The student's total score will be recalculated to reflect the change(s).

Note: The Transfer Average only shows on the "transfer to" class for the grading period(s) in which the student transferred.

15.11.5 Transfer Averages Explanation

The "Transfer Average" column on the "Scores/Comments" page shows the averages transferred from the previous class, along with the transfer weight, for each transferred student.

		Quiz 3 🗮	Chapter Test 4-5 🚆	Final Exam 🗮	Points Scored	Points Possible	Transfer Average [?]	Total 🗮
Date Due		11/7	12/3	12/17				
Possible Pts		50	100	100				
Average		84	91	93.3				92.55%=A
Andrews, Todd	10	42	84	87	213	250		85.2%=B
<u>Austin, Jane</u>				97	97	100	96.67(90%)	96.7%=A
<u>Cruz, Maria</u>	11		98	96	194	200	92(25%)	95.75%=A

Initially, the transfer average will be the only score for the student.

As grades for assignments in the class are entered, the student's total score will reflect the combination of those assignment scores and transferred average, based on the transfer weight.

For example:

Jane Austin, above, has a transfer average of 96.67, with a weight of 90%. She got a 97 on her final exam in the new class. That score will carry the weight of the remaining 10%.

Her Total score is calculated as follows:

96.67 x .90 = 87 97.0 x .10 = 9.7 87.0 + 9.7 = Total score of 96.7

For any assignments graded in the new class, the Points Scored is divided by the Points Possible and then multiplied by the remaining % weight.

The result is then added to the Transfer Average, after it's multiplied by the transfer weight, for the Total score.

In another example:

For Maria Cruz, above, who transferred sooner, her average of 92 carries a weight of only 25%. She completed two assignments in the new class for a total of 194 points scored out of 200 possible. Those scores will carry the weight of the remaining 75%.

Her Total score is calculated as follows:

194 / 200 = 97 97.0 x .75 = 72.75 92.0 x .25 = 23 23 + 72.75 = Total score of 95.75

		Total 🗮	Letter Grade	Problem Set 22 🚆	Chapter Quiz 6 🚍	Chapter Test 6 🚍	Q2 Participation 🚆	Problem Set 24 🚆	Test	Homework	Participation	Transfer Average [?]
Date Due				11/14	11/21	12/3	1/8	1/8				
Category				Homewo	Test	Test	Partic	Homewo				
Possible Pts				10	50	100	25	10	60%	20%	20%	
Average		42.78	F	20	82.3	82.5	90	75	82.44	20.5	90	
<u>Austin, Tom</u>	(1)	93.8	А	7	49	98	25	8	98	75	100	
<u>Jones, Maureen</u>		73.9	С	7	35	74	20	7	72.67	70	80	74(75%)

When using categories for your assignments, the calculation is a little more complex, but follows the same pattern.

Maureen Jones, above, has a transfer average of 74, with a weight of 75%. Assignments completed for the rest of the class will carry the weight of the remaining 25%.

Each category score is calculated using their corresponding weight. The sum of all categories is then weighted by the remaining 25%.

Her Total score is calculated as follows:

First the category calculations are completed: Category "Test": 72.67 x .6 = 43.6 Category "Homework": 70 X .2 = 14 Category "Participation": 80 x .2 = 16 Sum of all categories: 43.6 + 14 + 16 = 73.6

Then, the remaining weight (25% for this example) is applied to that score: $73.6 \times .25 = 18.4$

Then, the transfer average is calculated using the transfer weight (75% for this example): $74 \times .75 = 55.5$

Finally, the two are added together for the Total score: 18.4 + 55.5 = 73.9

	Total 🛍	Letter Grade	Book 2	<u>Vocabulary 2</u>	Transfer Average [?]
Date Due			1/8	1/8	
Weight			1	1	
Average 🛍	3.3	S+	3	3.5	
Baker, Mandy 🛍	3.6	E	3	4	4(20%)
Connor, Ralph 🛍	3	S+	3	3	

Transfer averages for points based grading scales are calculated similarly.

Mandy Baker, above, has a transfer average of 4, with a weight of 20%. Assignments completed for the rest of the class will carry the weight of the remaining 80%.

Her Total score is calculated as follows:

Transfer average: $4 \times .2 = .8$ New assignment scores: $(3 + 4) / (1 + 1) \times .8 = 2.8$ Total Score: .8 + 2.8 = Total score of 3.6

16 Grading Periods

View/manage grading periods for a chosen academic year. Student grades/attendance are entered into active grading periods. Manage grade/attendance entry by marking grading periods "Active" or "Closed".

Note: If your school also uses the "<u>Grade Reporting</u>" module to generate report cards, admins need to manage report card grading periods; mark active, closed or complete, in addition to the school grading periods. This is done at <u>Main > Grade Reporting > Define Report Cards > Mark Active/</u><u>Closed</u>.

Gradir	g Periods								
						Academic Yea	r: 2010-11	•	
Year	Grading Period	First Date	Last Date	Active	Weight	External ID			
2010-11	Q1	8/25/2010	10/29/2010	closed	25		edit delete add to classes		
2010-11	Q2	11/1/2010	1/14/2011	closed	25		edit delete add to classes		
2010-11	Sem #1			closed			edit delete add to classes		
2010-11	Q3	1/18/2011	3/25/2011	closed	25		edit delete add to classes		
2010-11	Q4	3/28/2011	6/3/2011	active	25		edit delete add to classes		
2010-11	Sem #2			closed			edit delete add to classes		
Croata	Grading Daried	Back to Main							
Greate	Create Grading Period Back to Main								

Main > Grading Periods

A recommended approach to managing grading periods would be:

- Near the beginning of a new grading period, mark the new grading period active. Also mark this grading period active in each of the instructors' classes.
- Follow-up 2 weeks later and close the old grading period. (See the "Edit Grading Period" section for more details.) This will close any "stragglers" that teachers did not already close. Typically, teachers have finished, but did not remember to close the grading period. This also has the advantage of cleaning up the parent view so they will not see old grading periods by default.
- See "Start a New Grading Period" for more details on managing grading periods.

Create Grading Period

Create new grading periods for a chosen academic year. Two methods for creating grading periods are provided, automated and manual.

- Automatically create all grading periods for a new academic year using the grading period wizard.
- Manually create grading periods when previously grading period(s) exist for an academic year.

Edit

Modify an existing grading period, mark them active/closed. Also updates corresponding status of classes for the chosen grading period.

Delete

Remove an unused grading period. **Note:** You cannot delete a grading period once it's been used. Mark it "closed" instead.

Add to Classes Add the chosen grading period to one/many classes. Note: Only classes missing the grading period will be shown.

16.1 Grading Period Wizard

The grading period wizard will lead you through creating grading periods for your school. This option is automatically provided when no grading periods exist for an academic year. After grading periods are created, add classes to them using the "Add to Classes" link on the "<u>Grading Periods</u>" page.

Main > Grading Periods > Create Grading Period

Select the grading periods that are most applicable to your school. **Note:** If the periods shown don't meet your needs, select "Other" to manually select and create grading periods.

	Create Gra	ading Periods	i i		_					
	Periods	Final Grades	Exams	Dates & Weights						
	What types of grading periods do you use?									
	C Quarters (Q1, Q2, Q3, Q4)									
	O Trime	esters (T1, T2, T3)								
	C 6-We	ek Terms (T1, T2,	T3, T4, T5, T6	3)						
	<u>Other</u>									
	<< Previous	Next >> Save	Cancel		_					
•					▶					

Semester or final grades are used by schools that record a separate grade at mid/end of year. Corresponding summary grading period(s) will be created based on your choice. For more details see the section below on "<u>Summary Grading Periods</u>". **Note:** There must be a summary grading period defined for the academic year in order to calculate yearly GPAs on report cards.

	Create Grading Periods
	Periods Final Grades Exams Dates & Weights
	Do you give semester or final grades?
	C No
	O Final Grade Only
	O Semester Grades (Sem 1, Sem 2)
	< Previous Next >> Save Cancel
4	Þ

Exam grading periods are used by schools that want a separate record of exam grades. Select exams that have grades calculated/recorded separately from other student grades. Corresponding exam grading periods will be created based on your choices. For more details see the section below on "Exam Grading Periods". Note: Choices differ based on final grades chosen above.

	Create Grading Periods	<u>×</u>
	Periods Final Grades Exams	Dates & Weights
	Do you give semester or final exams?	Do you give semester or final
I	<< Previous Next >> Save Cancel	

The wizard will initialize your grading periods based on the data provided and the start/end of your school year. Finalize the dates for each grading period. Assign weights based on how your grades factor into students' overall grades.

Periods	Final Grades	Exa	ms Da	ites & W	/eights			
Enter start dates, end dates, and weights for your grading periods.								
Grading Period	Start		End		Weight			
Q1	8/26/2010							
Q2								
Midterm Ex	am No date requi	red I	No date req	uired				
Q3]		
Q4			6/1/2011					
Final Exam	No date requi	red I	No date req	uired				
<< Previous Next >> Save Cancel								

Weight: (optional) Weighting for grading periods is optional, but can be useful when calculating overall grades, especially when summary/exam grading periods are in use. A weighted average of the grades for each grading period will be calculated. For more details see <u>Main > Grading Periods > Enter Summary Grades</u>.

16.2 Manually Create Grading Period

Manually create grading periods when previous grading period(s) exist for an academic year. New grading periods can also be added to existing classes. **Note:** The default for new grading periods is "closed". Mark the current grading period "Active" to allow instructors to create rosters, enter grades, etc.

Note: It is recommended that high schools, generating transcripts, use either "Sem#1 and Sem #2" **OR** "Final" summary grading periods.

	Create Grading Period									
	Academic Year: 2008-09 💌									
	Gradir	ng Period to Create								
	*Gradi	ing Period	Midterm Exam							
	First D)ate								
	Last D)ate								
	*Active	97:	No							
	*Sortir	ng:	Between Q2 and Q3							
	Weigh	ıt								
	Extern	al ID								
	* requir	ed field								
	Add N	ew Grading	g Period to the Classes							
	Add?	I? Classes								
	•	2008-09 6th Grade English, Section 3								
		2008-09 Lunch, Section 1								
	•	2008-09 F	Reading							
•	•	2008-09 127-Biology, Section 1								

Main > Grading Periods > Create Grading Period

Academic Year: Choose the academic year for creating the grading period. If classes are already defined for that year, you may choose to add the new grading period to the classes.

Grading Period: Select the grading periods that are most applicable to your school. For instance, if your school has four quarters in an academic year, then it will make sense to designate Q1, Q2, Q3, and Q4 as the grading periods.

• Special Grading Periods: Define special grading periods for exams, semester and year end, when needed. For more details see the sections below on "<u>Summary Grading Periods</u>" and " <u>Exam Grading Periods</u>". Note: There must be a summary grading period defined for the academic year in order to calculate yearly GPAs on report cards.

First Date/Last Date: The start and end dates are used to separate attendance data into the appropriate grading periods. **Note:** First/last dates cannot be set for Exam or Summary grading periods.

Active?: Manage grade entry for each grading period by marking them active/closed. Teachers can create rosters, enter scores/comments into "active" grading periods only. Teachers can view but not modify "closed" grading periods – these periods are saved for posterity. Parents and students will see "active" grading periods only by default.

New grading periods default to "closed", so to get started, mark the first grading period active.

Note: Teachers can override the active grading period for their individual classes. This allows them the flexibility to get started early or finish late. This way the admin does not need to worry about locking out individual teachers – they can always get into their classes' grading periods individually.

Sorting: Determines where in the list to place the new grading period.

Weight: (optional) The weighting scale for grading periods is optional, but can be useful when calculating overall grades, especially when summary grading periods are in use. A weighted average of the grades for each grading period will be calculated. For more details see <u>Main > Grading Periods</u> > <u>Enter Summary Grades</u>.

External ID: (optional) This feature is to be used if you plan to import data.

Add new grading periods to classes: Create the grading period in chosen classes. In addition to the school's grading periods, each teachers' class is also divided into grading periods. This allows teachers to give separate grades for each grading period.

16.3 Edit Grading Period

Modify an existing grading period. Open/close grading periods throughout the year to manage entry of grades, attendance, etc. For more details on managing grading periods throughout the year see the "Start a New Grading Period" section.

Edit Grading	Period	
Year:	2013-14]
*Grading Period:	Q1 •	
First Date:	8/21/2013	
Last Date:	10/11/2013	
*Active:	Yes Update active status of classes/sections too Create news feed item for instructors	
Weight:	1	
*Sorting:	Top of list (before Q2)	
ExternalID:		
Save Back		
	l l	ſ

Main > Grading Periods > Edit

Grading Period: Select a grading period from the dropdown list.

First/Last Date: Modify grading period start/end dates, as needed. **Note:** Use caution when changing grading period dates once they're in use. Dates do not apply to Exam and Summary grading periods.

• When changing existing dates an option is provided to also update student roster entries accordingly.

Active: Teachers enter assignments, grades, attendance in active grading periods. Close grading periods to prevent data entry and preserve historical data.

- Update active status of classes/sections too: Push active/closed status to classes/sections to add/remove them on teachers' working lists.
- Create news feed item for instructors: Show grading periods modifications on teacher news feeds.

Weight: Add a default weight for grade calculations. This is most often used when exam and/or summary grading periods are also in use. For more details see <u>Main > Grading Periods > Enter</u> <u>Summary Grades</u>.

Sorting: Modify the grading period sort order for the year.

External ID: (optional) Add/modify the external id used when importing data.

16.4 Summary Grading Periods

Use special grading periods for exams, semester and year end, when needed. Schools can use any combination of regular, exam and summary grading periods to meet their grade reporting needs.

Summary grading periods are used most often by schools that calculate GPAs and generate student report cards. They provide an easy way to separate grade calculations at the end of each semester and the year.

Note: There must be a summary grading period defined for the academic year in order to calculate yearly GPAs on report cards.

Note: It is recommended that high schools, generating transcripts, use **either** "Sem#1 and Sem #2" **OR** "Final" summary grading periods.

Sem #1, #2 Grading Periods: For schools that provide a summary grade at the end of each semester, in addition to quarterly grades.

Final Grading Periods: For schools that provide a single, final grade for the entire year.

Admins manage summary grading periods, mark active/closed, the same as regular grading periods to allow teachers to enter coinciding grades. Additionally, admins enter weights for each grading period to assure proper grade calculations. This can be done throughout the year, as weighting may change as the year progresses.

For semester or year end grading periods, instructor's grade entry is somewhat modified. Instead of importing grades from their gradebook, the grades are calculated from previous grading periods using assigned weights.

For more details see the following section "Enter Summary Grades".

16.4.1 Enter Summary Grades

At the end of each summary grading period, admins need to perform some maintenance operations to allow instructors to calculate/enter summary grades. Summary grading periods are Sem #1, Sem #2, and/or Final.

Activate Grading Periods: About two weeks before the end of the summary grading period, edit it to make it active. This allows teachers to calculate/enter summary grades.

Note: The regular (Q2 or Q4) grading period should already be active for grade entry, if not, mark it active.

Note: If your school also uses exam grading periods, the corresponding Exam Grading Period must also be marked active.

Main > Grading Periods > Edit

Note: You'll want to check "Update active status of classes/sections too", this makes the teachers' classes active too.

Set Default Weights: Edit each grading period that will be used in the summary grade calculation and set a default weight to the appropriate percentage. If you're using separate "Exam" grading periods, you'll want to also include them in the weighting. Setting the defaults here will initialize the values for instructors when they calculate/enter the summary grades. Grading periods not used in the calculation can be left blank or set to zero.

In the example below, Q1 and Q2 each will be 40% of the Sem #1 grade, with the exam comprising another 20%:

Year	Grading Period	First Date	Last Date	Active	Weight
2009-10	Q1	9/1/2009	10/16/2009	closed	40
2009-10	Q2	10/19/2009	12/18/2009	active	40
2009-10	Sem #1 Exam			active	20
2009-10	Sem #1			active	

Calculating Final Summary Grades:

Final summary grades can be calculated in one of two ways. Set the default weights based on how final grades will be calculated at your school:

- Calculate grades using grades from previous **regular** grading periods. For example: Set all 4 quarters to 25 to weigh them equally in the Final calculation.
 Note: All previous grading periods must have grade entry complete prior to calculating summary grades, including Exam grading periods, when used.
- Calculate grades based on previous summary grading periods (Sem #1, #2). For example: Set Sem #1, #2 each to a 50 percent weight for the Final calculation.
 Note: All semester summary grades must be calculated prior to calculating the final summary grades.

Instructors Generate Grades:

Once the weights have been set up, teachers run the "Overall Grades" report to generate semester/ final grades. Details on instructor summary grade entry is covered in the Gradebook Guide and Online Help at Instructor Main > Report Cards > Overall Grades.

Close Old Grading Periods: After all grade entry is finalized close each old grading period.

Main > Grading Periods > Edit

Note: You'll want to check "Update active status of classes/sections too" to remove classes from teachers' active/working list.

Note: Teachers can calculate summary grades in their gradebook if the corresponding option is set. This option is set for the entire school. For school's that don't use the Grade Reporting module, contact TeacherEase support to allow this option. Otherwise, see Admin Main > Grade Reporting > Options for more details.

16.5 Exam Grading Periods

Use special grading periods for semester/midterm/final exams, when needed.

Exam grading periods are used by schools that want a separate record of exam grades.

Sem #1, Sem #2 Exam Grading Periods: For schools that calculate semester exam grades separately from other student grades. For example: Use the "Sem #1 Exam" if grades are weighted Q1–40%, Q2–40% and Sem Exam-20%. On the other hand if the Sem Exam is averaged into Q2, it would not need its own grading period.

Midterm, Final Exam Grading Periods: For schools that record these exam grades separately from all other grading periods. For example: Use the "Midterm Exam" if grades are weighted Q1–40%, Q2–40% and Midterm-20%. On the other hand if the Midterm Exam is averaged into Q2, it would not need its own grading period.

Exam grading periods are managed, marked active/closed, the same as regular grading periods to allow teachers to enter coinciding grades. Additionally, admins enter weights for the grading periods to assure proper grade calculations. This can be done throughout the year, as weighting most likely will change as the year progresses. For more details see <u>Main > Grading Periods > Enter Summary Grades</u>.

Teachers create a coinciding exam assignment for exam grading periods, enter exam grades in their gradebooks and then import the grades into report cards, if used. This process is the same as for regular grading periods.

16.6 Start a New Grading Period

At the beginning of each grading period, the SchoolInsight admin needs to perform some maintenance operations.

Note: Grades and attendance can only be entered in "Active" grading periods.

Activate New Grading Period: About two weeks before the start of a new grading period, edit it to make it active. This allows teachers to enter grades, attendance, etc.

Main > Grading Periods > Edit

Note: You'll want to check "Update active status of classes/sections too", this makes the teachers' classes active too.

Turn on Report Cards: At the end of the grading period, activate report cards so teachers can enter report card grades.

Note: This step is only needed if your school uses the SchoolInsight Grade Reporting module.

Main > Grade Reporting > Define Report Cards > Mark Active/Closed

Close Old Grading Period: After all grade entry is finalized, and report cards have been generated, close the old grading period. Also, mark the report card grading period "Complete". This prevents grades from being changed and allows parents to view the information on the parent portal.

Main > Grading Periods > Edit

Note: Check "Update active status of classes/sections too" to remove classes from teachers' active/working list.

Main > Grade Reporting > Define Report Cards > Mark Active/Closed

17 Grading Scales

View/manage grading scales for your school. Teachers give grades based on grading scale(s) assigned to their classes. Create grading scale(s) from provided templates, then edit the details to meet your school's specific grading needs. Create as many grading scales as required. Once defined, assign scales to courses and/or classes.

Note: Grading scales do not automatically default to courses/classes. Assign grading scales to courses to automatically populate their corresponding classes/sections with the same scale. Grading scales can also be assigned to individual classes/sections, as needed. See the "<u>Course Catalog</u>" section for more details.

Note: Some districts may choose to define and manage grading scales at the district level only. District scales cannot be modified by schools. Schools may not have permissions to create additional grading scales.

Title		Scale							
, B, C, D, F (District Scale) Mode: Percentage Calculate Average: Yes	Letter Grade	Min %	GPA	Notes	Standard Skill Leve	d Passing		<u>view</u> <u>refresh</u>	
Used For GPA: Yes	A	90	4	Excellent	4	Yes			
Round: Yes - Round above	в	80	3	Very Good	3	Yes			
.5 Show on Report	С	70	2	Average	2	Yes			
ard/Transcript: Yes	D	60	1	Below Average	e 1	Yes			
	F	0	0	Failure	0	No			
, D, B Mode: Points Calculate Average: Yes	Letter Grade	Points	GPA	Notes	Standard Skill Level	Passing		<u>view</u> <u>edit</u> <u>delete</u> <u>refresh</u>	
Used For GPA: Yes	S	3	3	Secure	3	Yes			
Round: Yes - Round at mid	D	2	2	Developing	2	Yes			
onn	В	1	1	Beginning	1	Yes			
Show on Report									

Main > Grading Scales

Mode: Each grading scale is either percentage or points based. For more details see the "<u>Grading</u> <u>Scale Modes</u>" section that follows.

<u>Edit</u>

Modify existing grading scales. Change the letter grade, points/percentages values, GPA, notes. Designate values for standard skill levels, as needed. **Note:** Once used, the "Scale" values cannot be modified. Mark scales active/inactive. **Note:** Teachers cannot use inactive grading scales.

Delete

Remove the grading scale from your school. Note: Once used, a grading scale cannot be deleted.

<u>Refresh</u>

If your school options allow instructors the ability to modify their classes' grading scales, the "refresh" link will overwrite individual changes and set the scales to match new saved settings. **Note:** This

option is set at <u>Main > Options</u>.

Note: If your school uses Grade Reporting, you may want to use the provided link to create "Special Grade Codes" for use on Report Cards.

17.1 Grading Scale Modes

Teachers often grade differently. To support this variation, SchoolInsight supports two different grading scale modes: points and percentages. Depending on the mode, each letter grade will be represented either as a minimum percentage or point.

POINTS

PERCENTAGES

	Letter Grade	Points	Notes
0	s	3	Secure
	D	2	Developing
	в	1	Beginning

	Letter Grade	Min %	Notes
	А	90%	Excellent
$^{\circ}$	в	80%	Very Good
	с	70%	Average
	D	60%	Below Average
	F	0%	Failure

Points Mode: The points scale is often used at the elementary level, and to assess conduct, participation, etc.

When the grading scale mode is set to points, students' averages are shown as a point value (i.e. Mary's final average in English is 3, so she receives an S, which =3, for Secure). Points mode is useful when teachers don't give "letter grades." It's also useful when grading according to standards. **Note:** When the mode is set to points, once a letter grade is used to enter students' scores, you won't be allowed to change that letter grade or its points.

If the mode is points, each letter grade will be given a point value. When teachers enter scores, they can enter either points or letter grades. When calculating a final letter grade, SchoolInsight averages the scores together and chooses the nearest letter grade.

For example, if the grading scale is: S = 3 (secure) D = 2 (developing) B = 1 (beginning) and the assignments are weighted equally with scores: Assignment 1 = S (3) Assignment 2 = D (2) Assignment 3 = D (2) the average would be 2.33=D.

Percentage Mode: The percentage scale is often used at the middle and high school level.

When the grading scale mode is set to percentage, students' averages will be shown as a percentage (i.e. John's final average in Math is 94%, he earns an A). This is the grading scale mode that was traditionally used when today's adults were in school (although the percentages varied widely).

An example of a percentage based grading scale would be:

A >= 90% B >= 80% C >= 70% D >= 60% F >= 0%

If the mode is percentage, the student must score at least the minimum percentage to achieve a particular letter grade. For instance if the minimum percentage for an A is 90%, the student would need to score 90% or higher to get an A. Rounding may also affect the grade, when in use.

17.2 Create Grading Scale

Create a new grading scale for your school. Then, assign scales to courses/classes/sections.

Note: Some districts may choose to define and manage grading scales at the district level only. Schools may not have permissions to create additional grading scales.

	Crea	ate Gra	ding S	Scale									
		Point	ts-based	Grading Scale	s		Percentage-based Grading Scales						
		Letter Grade	Points	Notes			Letter Grade	Min %	Notes				
	0	S	3	Secure	1		A	90%	Excellent				
		D	2	Developing		0	в	80%	Very Good				
		в	1	Beginning			С	70%	Average				
					,		D	60%	Below Average)e			
		Letter Grade	Points	Notes	tes		F	0%	Failure				
		E	4	Excellent			Letter	Min 0/	Notoo	Letter	Min 0/	Notoo	
	•	S+	3	Good			Grade	WIII 70	Notes	Grade	IVIII 70	Notes	
		S-	2	Satisfactory			A+	97%	Excellent	С	73%	Average	
		N	1	Needs Improv	ement		A	93%	Excellent	C-	70%	Average	
				1		0	A-	90%	Excellent	D+	67%	Below Average	
							B+	87%	Very Good	D	63%	Below Average	
							в	83%	Very Good	D-	60%	Below Average	
							B-	80%	Very Good	F	0%	Failure	
							C+	77%	Average				
		_											Ľ
	Save	Back											-
•			_									ŀ	

Main > Grading Scale > Create Grading Scale

Select a grading scale from predefined templates. Select the scale that is most similar to your school's scale. Once saved, customize the details to match your school grading scale at $\underline{Main} > \underline{Grading \ Scales > Edit}$.

Some schools need multiple grading scales. Create as many different scales/types of scales as required.

17.3 Edit Grading Scale

Modify an existing grading scale. Change the title and values, as needed. Align standards-based scales with grading scale values.

	Edit Grading Scale											
	Title: A, B, C,											
	Letter Grade	Points	GPA	Notes	Standards-based Scale Points	Passing Grade?	Ŧ					
	A	5	5	Excellent		Yes 💌	_					
	В	4	4	Very Good		Yes 💌						
	С	3	3	Average		Yes 💌						
	D	2	2	Below Average		Yes 💌						
	F	1	1	Failure		No 💌						
•						No 💌	•	1				

Main > Grading Scales > Edit

Modify an existing grading scale: Use the + to add more rows to define additional grades for the scale, as needed.

- Change the grading scale title.
- Change the letter grade, points or minimum percentages.
- Designate values for calculating GPA.
- Modify the notes associated with the letter grade.
- Align the Standards-based Scale skill levels with the grading scale values, letter grade/percentage/ points. Note: First create your standards-based scales at Main > Standards/Planning > Standards Scales.
- Set which grades are passing or failing.

Choose additional options for the grading scale: **Note:** Options differ for percentage/points grading scales.

Options						
Active:						
Calculate Average:						
Used for Calculating GPA and Credits Earned: (Classes Will Show on Transcript)						
Rounding:	 Round up for scores higher than 0.6 Round up for scores within 0.6 Round up scores at the mid point Do not round 					
Print Scale on Report Cards/Transcripts:						
External ID:						

Active: Mark the grading scale active/inactive.

Calculate Average: Have the average automatically calculated for you. This is the default.

Used for Calculating GPA and Credits Earned: Scale is used as indicated. Classes/sections assigned the scale are included on student transcripts.

Rounding: Set the rounding option for scores: Examples below are based on a 1,2,3,4 points scale.

- Round Up for Scores Higher Than: Rounds up to the next score for all scores at or above the value entered. Note: For percentage based scales, uncheck to disallow rounding. Example: For value of 0.6, points score of 3.5 will not round, score of 3.6 or higher rounds to 4.0.

Additional Rounding Options are available for Points-based scales:

- Round Up for Scores Within: Rounds up all scores within X (value entered) of the next point scale value. Example: When value = 0.2, points score of 3.8 will be rounded to 4.0.
- Round Up Scores at the Mid Point: Rounds up all scores that are at or above the midpoint. **Example:** Points scores 3.5 through 3.9 will round to 4.0.
- Do Not Round: Do not allow any score rounding.
- Print Scale on Report Cards/Transcripts: Show scale when printing student report cards and/or transcripts.

18 Course Catalog

Schools define courses of study. A course is a topic of study such as 5th Grade English. Classes/ sections can later be defined using courses (e.g. 5th Grade English, Period 1). Courses can be aligned with standard items, standards-based scales and curriculum maps. Use courses to create classes/sections, align standards and create curriculum.

Note: Grading scales do not automatically default to courses/classes. Assign grading scales to courses to automatically populate corresponding classes/sections with the same scale. To add the same grading scale to many courses at once, use "<u>Course Mass Edit</u>". If a course grading scale is not assigned, classes/sections must be individually assigned a scale.

Course Catalog				_
Grade Level: All		•	School: All School	ol and District Courses 💌
Subject Area: All		•	Show: Both Activ	e and Inactive Courses 💌
Course Subject - <u>Grade Level</u> - <u>Number</u> - <u>Title</u>	Credits	Options		
Art Subject: Art Grade Level: 4	1	Counts for GPA	view edit delete standards curriculum sections	
Physical Education Subject: Health / Physical Education	1	Counts for GPA	view edit delete standards curriculum sections	
4th Grade Math Subject: Mathematics Grade Level: 4	1	Counts for GPA	view edit delete standards curriculum sections	
4th Grade Reading Subject: Reading Grade Level: 4	1	Counts for GPA	view edit delete standards curriculum sections	
Biology Subject: Science Grade Level: 8	1	Counts for GPA	view edit delete standards curriculum sections	
Social Studies Subject: Social Studies Grade Level: 8	1	Counts for GPA	view edit delete standards curriculum sections	
Count: 6				
Create Course Mass Edit Back				•

Main > Course Catalog

Grade Level: Narrow course selection by grade level.

Subject Area: Narrow course selection by subject area.

School: Select courses for your school, or include district defined courses.

Show: View courses that are active/inactive or both.

Subject - Grade Level - Number - Title: Click heading to sort courses by selected topic.

Create Course

Create a new course for your school and align it to standards.

Mass Edit

Make the same changes to many courses at the same time.

<u>View</u>

View the course parameters, add standards and define curriculum maps.

<u>Edit</u>

Modify course parameters. Mark a course "inactive" if you don't want to use it now, but preserve it for future use. **Note:** Modified standards-based scales will automatically be pushed to edited course(s) classes for existing class standards-based scales with the same number of scale items. **Note:** It is highly recommended that once courses are in use, that you refrain from changing them. Doing so may cause confusion on reports and other references to the course.

Delete

Remove a course from use if no classes are using it.

Standards

View standards covered by the course, import additional or delete standard items.

Curriculum

View a curriculum map for a course. Curriculum map details are covered in the "Lesson Plans & Curriculum Mapping Guide".

Sections

View and manage class sections for a chosen course. See more details at Main > Classes/Sections.

18.1 Create Course

Define courses for your school. Courses can be aligned with standards and standards-based scales. Class sections can be created from the course. Later, define curriculum maps for courses. **Note:** Create special courses, such as, "Preparatory Period" with zero credits. Then, create classes to add prep periods to instructor schedules. **Note:** If your school/district has purchased the Scheduling portion of SchoolInsight, a "Scheduling" tab will be provided when you create/edit courses. For more details see the "<u>Course Catalog</u>" section of the Scheduling Help/Guide.

Main > Course Catalog > Create Course

Create Course ٠ State Fields General Misc *Title: Course Number: *Credits: 1.0 Counts for GPA Subject Area: -Course Level: Ŧ Grading Scale: -Standards-based Scale: • Grade Level: Max • Min Grading Periods C Create a single full year course C Create 2 courses, 1 for each semester C Create a single semester course C Create a single grading period course C Other Special GPs: 🔲 Has exam grading periods Has summary grading periods State Fields * required field Save & Create Another Save & Add Standards Back Save

General Tab: Enter overall details for the course:

Title: Descriptive title of the course.

Course Number: Course number, if applicable.

Credits: Number of credits earned upon course completion. Check "Counts for GPA" to include this course and it's classes when calculating student GPAs.

Subject Area: Select a subject area from the dropdown box.

Course Level: Academic level for the course. **Note:** Define course levels at <u>Main > Options ></u> <u>Course Levels</u>.

Grading Scale: Select a grading scale for the course. **Note:** The chosen grading scale will automatically be applied to all corresponding classes/sections.

Standards-based Scale: Select the standards-base scale to be used for the course, if used. **Note:** The chosen scale will automatically be applied to all corresponding classes/sections.

Grade Level: Assign specific grade levels to the course, if desired.

Grading Periods: Enter grading period details to guide when/where courses are created: **Note:** Additional options are provided based on the type of course. See the "<u>Course Grading Periods</u>" section for details.

- Create full year, semester or quarterly courses.
- Select additional details, as required. See the "Course Grading Periods" section.
- Select if the course uses exam and or summary grading periods.

Save & Create Another

Saves the course and opens a page to create a new course.

Save & Add Standards

Saves the course and allows you to import standard items for the course.

State Fields Tab: Assign state required information to the course: **Note:** Available fields vary by state.

General St	ate Fields	Misc	
State Number:			
Articulated Credit:	-		
Dual Credit:	-		
Course Setting:			
General			Misc >

Misc Tab: Assign miscellaneous details to the course:

General	State Fields Misc				
Course Fee:	[?] ^{\$}				
Notes:					
C State Fields					

Course Fee: Add a fee for this course. Manage course fees at Main > Tuition/Fees.

Notes: Enter additional course details, as needed.

18.1.1 Course Grading Periods

SchoolInsight provides the flexibility to create courses for various timeframes, such as, whole year or single semester courses. While defining the course, also select special grading periods that apply to the course. More details on special grading periods can be found at <u>Main > Grading Periods ></u> <u>Summary Grading Periods</u> and <u>Main > Grading Periods > Exam Grading Periods</u>.

Single full year course: Create a single course that is taught for the entire year, all grading periods.

Grading Periods				
Create a single full year course				
C Create 2 courses, 1 for each semester				
C Create a single semester course				
C Create a single grading period course				
C Other				
Special GPs:	🗆 Has exam grading periods			
	🗌 Has summary grading periods			

2 semester courses: Create two, one semester courses. Each course is automatically assigned the corresponding number of semester grading periods.

The course titles for 2 semester courses can be entered in two different ways:

- Enter a single title and SchoolInsight will automatically populate the semester titles. Modify them, as needed.
- Leave the single title blank and enter each semester course title manually.

Grading Periods				
C Create a single full year course				
Create 2 courses, 1 for each semester				
C Create a single semester course				
C Create a single grading period course				
C Other				
Special GPs:	🗌 Has exam grading periods			
	□ Has summary grading periods			

Course Specific Fields (For making 2 courses)				
	Semester 1	Semester 2		
*Title:				
Course Number:				
State Number:				
*Credits:	0.5	0.5		

Credits for 2 semester courses are initialized to be a half credit, each. Modify them, as needed.

Single semester or single grading period course: Create a single course that is one semester, or one grading period in duration. Then select which semester(s) the course will be offered.

Grading Periods			
C Create a single full year course			
C Create 2 courses, 1 for each semester			
 Create a single semester course 			
C Create a single grading period course			
C Other			
Possible Semester(s):	☑ Sem 1 ☑ Sem 2		
Special GPs:	 Has exam grading periods Has summary grading periods 		

Credits for single semester or single grading period courses are initialized to one full credit. Modify them, as needed.

Other: Create a single course with any chosen semester, grading period combination.

Grading Periods			
C Create a single full year course			
C Create 2 courses, 1 for each semester			
C Create a single semest	ter course		
C Create a single grading	period course		
Other			
Possible Semester(s):	🗹 Sem 1		
	🗹 Sem 2		
Number of Grading Periods	4 💌		
Special GPs:	□ Has exam grading periods		
	🗆 Has summary grading periods		

The course credit is initialized to one full credit. Modify, as needed.

18.2 Course Mass Edit

Make changes to many courses at the same time. Select data to modify from dropdown boxes. Select the courses to change and save.

Note: Available "Data to Edit" varies based on which SchoolInsight modules are being used by your school/district.

Cours	se Mass Edit		
			Data to Edit
Subject Area: Credits:			•
Articula	ated Credit:	-	
Dual C	redit:	-	
Counts	s for GPA:	-	
Course	e Level:		V
Course	e Setting:		
Gradin	g Scale:	•	
Standards-based Scale:			▼
Grade	Level:	Min	Max
Active		-	
Save	Back ow Inactive Course	es	
Courses to Edit		Edit	
Edit?	Cour	ses	
	Art [4] - Art		
	Health/PE - Physical Education		
	Mathematics M1 -	Ath Grade Math	

Main > Course Catalog > Mass Edit

Note: Grading Scales will be automatically assigned to all corresponding classes/sections.

Note: Standards-based scales will be automatically assigned to corresponding classes/sections for existing class standards-based scales with the same number of scale items.

18.3 Course Standard Items

Schools and districts can specify standards to be covered by courses. Collectively all the courses should cover all standards. Import existing standards to create course standards.

Course Standard Items					
Course: English and Litera	ature Grade 6, 6th Grade English				
Import Standard Items	ort Standard Items Delete Standard Items Refresh Standard Items Back				
Number	Description				
3	Write to communicate for a variety of purposes.	delete			
3A	Grammar, Spelling, Punctuation, and Capitalization	delete			
	Grammar and Sentence Structure	delete			
3.6.01	Write complete sentences (e.g., avoid fragments and run-on sentences).	delete			
3.6.02	Use the correct form of regular and irregular verbs.	delete			
3.6.03	Write a variety of sentences (e.g., simple, compound and complex).	delete			
3.6.04	Use correct subject-verb agreement.	delete			
3.6.05	Write sentences with correct pronoun-antecedent agreement.	delete			
3.6.06	Demonstrate grade-appropriate use of the various parts of speech.				
3.6.07	Use consistent verb tense.				
	Spelling				
3.6.08	Spell grade-appropriate words correctly.				
	Punctuation and Capitalization				
3.6.09	Capitalize words correctly (based on grade-appropriate rules).				
3.6.10	Use correct end punctuation.				
3.6.11	Use grade-appropriate commas correctly.				
3.6.12	Use grade-appropriate apostrophes correctly.	delete			
3.6.13	Use quotation marks in direct quotations.				
3B, 3C	Composition				
Persuasive Composition	Write a persuasive composition by taking a position on a topic and developing one side of the argument.				
Parsuasiva (Focus)	The clarity with which a composition presents and maintains a clear main idea or	doloto			

Main > Course Catalog > Standards

Import Standard Items

Create course standards by importing state/district standard items.

Delete Standard Items

Remove one or many standard items from a course. **Note:** The top level "goals" and "standards" cannot be deleted while lower level items using them exist. Delete lower level items first.

Refresh Standard Items

Assign existing course standard items to existing class sections for the chosen course.

18.4 Import Standard Items

Each course should cover a set of standard items. Set up course standards by importing common core, state or district standards. Later, use reports to assess standards coverage by course curriculum.

First, search for a standard based on entered criteria, such as, subject area, grade level, district, etc. Select a standard and then choose which corresponding standards and sub-items to import.

Main > Course Catalog > Standards > Import Standard Items

	Import Standard Items					
	Course: 6th	th Grade Math (Full-Year, 1, Mathematics)				
	Standard:	math 6 (ex: 7 math)				
		2011 IL Mathematics, (Grade K-12), Common Core State Standards				
	Numbe	2011 IL Mathematics, (Grade 6), Common Core State Standards				
	Please se	2010 Common Core Mathematics, (Grade K-12), Common Core State Sta	andards			
		2010 Common Core Mathematics, (Grade 6), Common Core State Standa	ards			
		2010 Common Core Mathematics, (Grade 6), Common Core State Standa	ards			
	Back	2004 IL Mathematics, (Grade 6), Assessment Framework				
		2002 IL Mathematics, (Grade 4-6), Performance Descriptors				
		2002 IL Mathematics, (Grade 5-7), Performance Descriptors				
	Copyright ©	2002 IL Mathematics, (Grade 6-8), Performance Descriptors				
		1997 IL Mathematics, (Grade 6-8), Learning Standards	-			
•			►			

Search for a standard item, choose a standard, select items to import.

	Import Standard Items						
Course: 6th Grade Math (Full-Year, 1, Mathematics)							
Standard: 2011 IL Mathematics, (Grade 6), Common Core State Standards Search: math 6 (ex: 7 m							
		Number	Description	Label			
		CC.6.RP.1	Understand the concept of a ratio and use ratio language to describe a ratio relationship between two quantities.	Standard			
		CC.6.RP.2	Understand the concept of a unit rate a/b associated with a ratio a:b with b is not equal to 0, and use rate language in the context of a ratio relationship.				
		CC.6.RP.3	Use ratio and rate reasoning to solve real-world and mathematical problems, e.g., by reasoning about tables of equivalent ratios, tape diagrams, double number line diagrams, or equations.				
	•	CC.6.RP.3a	Make tables of equivalent ratios relating quantities with whole-number measurements, find missing values in the tables, and plot the pairs of values on the coordinate plane. Use tables to compare ratios.				
	◄	CC.6.RP.3b	Solve unit rate problems including those involving unit pricing and constant speed.				
	•	CC.6.RP.3c	Find a percent of a quantity as a rate per 100 (e.g., 30% of a quantity means 30/100 times the quantity); solve problems involving finding the whole, given a part and the percent.				
	◄	CC.6.RP.3d	Use ratio reasoning to convert measurement units; manipulate and transform units appropriately when multiplying or dividing quantities.				
	CC.6.NS.1 Interpret and compute quotients of fractions, and solve word problems involving division of fractions by fractions, e.g., by using visual structure fraction models and equations to represent the problem						

When choosing a standard item with associated sub-items, all items are automatically selected. Deselect items to remove them prior to importing.
		٠
	*Insert imported standard items at the: Bottom of the list	
	· · · · · · · · · · · · · · · · · · ·	
	Import Back	-
◀		

Position additional items at the top/bottom of the list using the sort option at the bottom of the page.

19 Classes/Sections

Classes are taught for each course. A class consists of teacher(s), roster, course title and sections. Each course is typically taught many times and will have many class sections. View and manage classes for the school. Assign multiple teachers to a single class for co-teaching situations.

Classes/Sections												
Grade Level: All]		View	By: Subject / Grade Level 💌								
Subject Area: All			Academi	ic Year: 2011-12 💌								
Grading Period: All												
Create Class Create Many Classes Copy Classes Mass Edit Mass Delete Back												
Title Instructor - <u>Title</u> - Grade Level - <u>Subject</u>	Instructor	Grading Periods	Options									
Geography Grading Scale: School Default	Million, M	Q1 (active) Q2 (closed) Q3 (closed) Q4 (closed)	Credits: 1 Take Attendance	view roster edit <u>delete</u> standards <u>mark</u> active/close								
Physical Education Section: 1 Subject Area: Physical, Health and Safety Education Grading Scale: School Default	Toto, D Million, M	Q1 (active) Q2 (closed) Q3 (closed) Q4 (closed)	Credits: 1 Take Attendance	<u>view roster edit delete</u> <u>standards mark</u> <u>active/close</u>								
Social Studies Grading Scale: School Default	Million, M	Q1 (active) Q2 (closed) Q3 (closed) Q4 (closed)	Credits: 1 Take Attendance	view roster edit <u>delete</u> standards <u>mark</u> active/close								
English	Toto, D	Q1 (active)	Credits: 1	view roster edit delete								
	Classes/Sections Grade Level: All Subject Area: All Grading Period: All Create Class Create Many Classes Copy C Title Instructor - Title - Grade Level - Subject Geography Grading Scale: School Default Physical Education Section: 1 Subject Area: Physical, Health and Safety Education Grading Scale: School Default Social Studies Grading Scale: School Default English	Classes/Sections Grade Level: All Subject Area: All Grading Period: All Create Class Create Many Classes Copy Classes Mail Instructor Geography Grading Scale: School Default Toto, D Million, M Physical Education Section: 1 Subject Area: Physical, Health and Safety Education Grading Scale: School Default Million, M Social Studies Million, M Figlish	Classes/Sections Grade Level: All Subject Area: All Grading Period: All Create Class Create Many Classes Copy Classes Mass Edit Mass Dele Instructor Title Instructor Instructor Grading Periods Geography Million, M Q1 (active) Grading Scale: School Default Million, M Q1 (active) Section: 1 Subject Area: Physical, Health and Safety Million, M Q2 (closed) Education Grading Scale: School Default Million, M Q2 (closed) Social Studies Million, M Q1 (active) Q2 (closed) Grading Scale: School Default Million, M Q2 (closed) Q3 (closed) Q4 (closed) Q2 (closed) Q3 (closed) Q4 (closed) Grading Scale: School Default Million, M Q1 (active) Q2 (closed) Q3 (closed) Q4 (closed) Q3 (closed) Q4 (closed) Grading Scale: School Default Million, M Q1 (active) Q2 (closed) Q3 (closed) Q4 (closed)	Classes/Sections Grade Level: All View I Subject Area: All Cademi Grading Period: All Create Class Create Many Classes Copy Classes Mass Edit Mass Delete Back Instructor - Title Grading Periods Options Title Instructor Grading Periods Options Geography Grading Scale: School Default Million, M Q1 (active) Credits: 1 Grading Scale: School Default Million, M Q1 (active) Credits: 1 Mass Edit Mass Edit Mass Edit Mass Edit Mass Edit Mass Edit Million, M Q1 (active) Credits: 1 Grading Scale: School Default Million, M Q1 (active) Credits: 1 Social Studies Million, M Q1 (active) Credits: 1 <th cols<="" th=""></th>								

Main > Classes/Sections

Narrow class selection by grade level, subject area and/or grading period.

View By: View classes/sections by instructor, course, or subject/grade level. Search for a specific instructor or course.

Academic Year: View classes for the chosen academic year.

Instructor - Title - Grade Level - Subject: Sort classes by selected topic.

Create Class

Create new classes for your school. Initially, there will not be any classes defined. Once created, the list of classes for each school year include, grading periods, instructor(s), class title, and chosen options.

Create Many Classes

Quickly create many classes from courses. Assign them to instructors, grading periods and teams.

Copy Classes

Copy existing classes from one year to another. Choose to also have grading periods created for the new year.

Mass Edit

Change details for many classes at the same time. Modify instructor assignments. **Note:** Course defined data cannot be changed when editing classes.

Mass Delete

Delete many classes at once from a future academic year. **Note:** This option is only available for future academic years.

Roster

Manage class rosters, add or remove students. Instructors can also add students to their rosters. Managing rosters is further defined in the <u>Rosters section</u>.

Change class details via the edit, delete, mark active/close links.

Standards

View class standards assigned to the chosen class. Generate a printable page.

19.1 Create Class

Create a new class for the chosen academic year. Classes are created from active courses. Create as many class sections as needed.

Note: Remember to cover special cases, such as, partial year classes and classes without students. For a class that has new students each quarter, create 4 separate class sections for each corresponding grading period. This makes it easy to assign students to the appropriate class section. For classes without students, like teacher prep time, first create a "Preparatory" course with zero credits. Then, create class sections to add prep periods for instructors, with no students assigned.

Create Class Academic Year: 2010-1	1	
Course:	Social Studies [8] - Social Studies (1)	show all sections
State Course Number:		
Section:		
*Grading Periods:	 ☑ Q1 ☑ Q2 ☑ Q3 ☑ Q4 	
Instructor:	Instructor Primary Instructor	
*Grading Scale:	School Default	
*Credits:	1	
Take Attendance:		
Hide From Parents:		
Hide From Searching:		
External ID:		
Notes about curriculum, expectations, etc:		×
(Hide some options)		
* required field	Sava Oaku Baak	
Save & Add Students	Save Only Back	

Main > Classes/Sections > Create Class

Choose an academic year for the new class, then search for the course to create the class from. Assign grading periods for the class. Assign the instructor(s) and section now or add them later. Use the + to add multiple instructors to a class, as needed. Choose a grading scale for the class. **Note:** Grading scales can be assigned to courses. Then, corresponding classes/sections will be automatically populated with the course grading scale and cannot be modified.

Note: If your school uses report cards and has multiple assessment lists defined, an option to select the assessment list is provided.

Note: If your school uses the Lunch module, an option to "Take Lunch Count" is provided.

Note: If your school uses teams for scheduling, a "Team" option is provided.

Take Attendance: Check to have teachers take attendance in this class.

Hide From Parents: When checked, the class will not appear on the "Parent's" page or when generating progress reports.

Hide From Searching: When checked, the class will not be included when searching for lesson plans.

Save & Add Students

Save the class and add existing students to the roster.

Save Only

Save the class that has been created. If you "Save Only," then a roster for the class will have to be created separately.

19.2 Rosters

View and manage class rosters. Add existing or new students to class rosters. Create individual grading scales for special needs students.

<u>Grade</u> Level	<u>Name</u> △	<u>Student</u> <u>Number</u>	Roster Number	Other Info	Notes	
9	Austin, Jane	1072	1	Has Alerts		<u>edit</u> <u>delete</u> transfer grading scale
9	Baker, Bob B.	1074	2	Has Alerts		edit delete transfer grading scale
9	<u>Cruz, Maria</u>	15795	3	Exit Date: 10/1/2008 Transferred In From: Biology, Section 2, Birdman J Roster Status: Inactive		<u>edit delete</u> <u>transfer</u> grading scale
9	<u>Hernandez, Sofia</u>		4			edit delete transfer grading scale
9	Jones, Hector	1040	5	Exit Date: 12/19/2008 Transferred Out To: Biology, Section 2, Birdman J		edit delete grading sca
9	Wade, Robert R	1065	7			edit delete transfer grading scale
	Seats 16/20 Available: 16/20 Males: 2 Females: 2 Has IEP: 0					

Main > Classes/Sections > Roster

Add Existing Students

Select existing students to add to the chosen class roster.

Create Student

Allows you to create a new student that can then be added to the class roster. View more details at Main > Students > Create Student.

Copy

Copies students from one class roster to another. You can also copy grades for matching assignments.

Reset Numbers

Changes the roster number based on chosen sort order.

Mass Edit

Modify class enrollment information for many students.

Transfer Averages

Modify student's averages and/or weights for transferred classes. Values chosen will affect the student's overall grade.

Edit

Modify the student's roster number. Update class roster enrollment entry/exit dates.

Delete

Delete students from a chosen class roster. **Note:** Scores and comments will also be deleted. Instead, you may want to update their enrollment details to have them marked "inactive" which preserves their records.

Transfer

Move a chosen student between existing classes. Transfer their grades with them. **Note:** The class grading scale must calculate averages in order to transfer students.

View more details on transferring students at Main > Students > Student's Rosters > Transfer Student

Grading Scale

Modify the class grading scale values for a chosen student. Assign the individual grading scale to one/many classes on a student's roster.

19.2.1 Add Existing Students

Initially there won't be any students on the roster. To add existing students to the roster, click on the "Add Existing Students" button on the Rosters page.

	Add Existing §	Studer	nts to Roster				_					
	Class: 2008-09 127	7-Biology	y, Section 1, Birdmar	n								
	Grade Level: 9 - Ninth Grade											
Homeroom Instructor: All												
	Save Back											
	Add to Roster? Grade		No. 0	Student Number	Class Enrollment	Statistics						
			Name 4	Student Number	Seats Available:	16/20						
	Already on Roster	9	Austin, Jane	1072	Males: Females:	2						
	Already on Roster	9	Baker, Bob B.	1074	Has IEP:	0						
	Already on Roster	9	Cruz, Maria	15795								
	Already on Roster	9	Hernandez, Sofia									
	Already on Roster	9	Jones, Hector	1040								
		9	Long, Michael	1042								
		9	Sanders, Susan	1048								
		9	Smith, Amanda	1053			•					
•	1		:	1			▶					

Main > Classes/Sections > Roster > Add Existing Students

Narrow choice by grade level/homeroom and select students to add to the class roster.

Note: If the class corresponds to a course with a fee, setup fees first at <u>Main > Tuition/Fees</u>. Once set up, course fees will automatically be added to each student when they're added to the class roster.

19.2.2 Edit Roster

Update a student's enrollment information for a chosen class.

Note: A redesign took place during the summer of 2010 regarding the use of "Active" status. Student's roster enrollment status is no longer manually entered. Active/inactive is calculated based on the student's entry/exit dates.

	Edit Roster			
	Student: Allen, Tom Class: 2012-13 Social S	Studies (Section 1, M. Million)		
	Roster Number:	2		
	Roster Enrollment: [?]	Entry Date: [choose gp] Exit Date: [Choose Grading Period 🗙	
	Transferred Out:	No	Q3	
	Notes:		I Q4 OK Cancel	
	Note: Click <u>here</u> to edit Save Back	general student info (name, student numl	ber, phone, etc.).	•
•			•	

Main > Classes/Sections > Roster > Edit

Roster Number: Provide a roster number for the student used for tracking and sorting rosters.

Roster Enrollment

Student "active" status on rosters is determined by the entry/exit dates. This is usually the current date, however, future dates can also be entered. Set dates in the future for roster changes that will then take effect automatically on the chosen date. You no longer manually change the active/inactive status.

Note: Entry/exit dates default to the first/last day of the academic year when no dates are entered.

Entry Date: Indicate when the student started in the class.

Exit Date: Indicate when the student left the class. **Note:** If the student was transferred out of this class, their transfer date will appear as the exit date.

Current Status: Active, Inactive, or Future, based on roster enrollment entry/exit dates.

Transferred Out: Indicates if the student transferred out of this class. When transferred is yes, students are marked inactive and the transfer date is shown as the "Exit Date". **Note:** If transfer is yes, student's grades will not appear on progress reports, report cards or transcripts for the class they transferred from. If needed, grades must be manually entered, or to view existing grades, change

"Transferred Out" to "No". The student will then appear on the Instructor's "Scores/Comments" page for both classes. Use these steps to also "undo" a transfer. Once the student is active again, delete them from the roster of the class they transferred to.

19.2.3 Copy Roster

Copy students from a class roster to one or more classes. This is useful when blocks of students move together throughout the day. Also, copy existing grades for matching assignments. This is useful when moving students from one class to another during the year.

	Copy Students													
	Class: 2009-10 127-Biology, Section 1, Birdman													
	Copy Back													
	Students to copy schedule for													
	Сору	Namo	Grade	Student Number			Name	Grade	Student Number					
		Name	Uraue	Student Number		~	Baker, Bob	10	1074					
		Austin, Jane	10	1072	I	~	Moore, Melissa	10	1043					
		Jones, Hector	10	1040		~	Smith, Amanda	10	1053					
		Sanders, Susan	10	1048										
		Wade, Robert	10	1065										
•									Þ	Ť				

Main > Classes/Sections > Roster > Copy

Select students to copy to other class roster(s).

	Instr	uctor: Jay B	irdman 💌								
			Copy Students to:								
		Instructor	Class	Schedule							
		Jay Birdman	Biology, Section 1	2 MTWTHF							
	☐ Jay Birdman Biology Lab, Section 1 [complex]										
	□ Jay Birdman Geometry, Section 1 1 MTWTHF										
		Jay Birdman	Biology, Section 2	[complex]							
		Jay Birdman	6th Grade English, Section 1								
		Jay Birdman	6th Grade English, Section 2								
		Jay Birdman	6th Grade Math, Section 1								
		Jay Birdman	6th Grade Math, Section 2								
		Jay Birdman	Preparatory period, Section 1								
		Jay Birdman	Science		-						
		Jay Birdman	Math								
		Jay Birdman	6th Grade English, Section 10								
		Copy grades to	oo (for assignments that match	exactly)?							
	Cop	y Back			•						
•				•	Ē						

Narrow "copy to" class selection by instructor, as needed.

When moving students from one class to another during the school year, you can also choose to copy their existing grades. **Note:** Grades can only be copied when assignments match exactly. They must have the same grading period, title, date and possible points.

If assignments don't match, use the "Transfer" function to move a student to another class. Transfer a grading period average score with the student. **Note:** The class grading scale must calculate averages in order to transfer students. View more details on transferring students at <u>Main > Students</u> <u>> Student's Rosters > Transfer Student</u>.

19.2.4 Transfer Student

Easily move students between classes. Transfer students out of a class for which they're currently on the roster. Add them to the roster of a new class. Transfer gradebook averages to the new class. **Note:** Classes must have the same grading scale and grading periods in order to transfer students. If your school uses report cards, the classes must also use the same assessment list.

Note: Transfer student only transfers a grading period average score. To move a student to another class roster and copy their grades for matching assignments, use <u>Main > Classes > Roster > Copy</u>.

Main > Students - Multi View > Rosters > Transfer

-OR-

Tra	nsfe	r Studei	nt										
Stude Class 6/19/2	ent: Au s: 200 2009	ustin, Jane 8-09 127-E	Biology, Sect	ion 1, Birdmar	n								
		Grade	book Data		Report Card Data			Transfer Date					
Gra Pei	ding riod	Average	Weight in New Class [?]	Copy Progress Report Comments	 Image: Construction Image: Construction<	Transfer report card grades		*Last Day (in old class):		9 💌 2008 💌			
Q1		92	100	V				(in new class):	1/5/2009				
Q2		96.67	90								_		
Q3													
Q4													
Tran	Isfer	Back											
			Transfe	er Student to:				De	etails				
0	2008-	-09 6th Gra	de English,	Section 3			Diffe	rent Report C	ard Grading Scales				
0	2008-	-09 Lunch	1, Section 1				Stud Diffe	ent Already E rent Report C	nrolled Card Grading Scales				
0	2008-	-09 Readin	g										
۲	2008-	-09 127-Bio	ology, Sectio	n 2, Birdman									
	2008-	-09.6th Gra	de Enalish	Section 1 Bird	lman						▼		

Main > Classes/Sections > Roster > Transfer

Grading Period / Grade / Weight:

The current gradebook average(s), per grading period, will be displayed. For closed grading periods, a weight of 100% will automatically be entered. For active grading periods, you'll need to enter a weight. The weight should be chosen to most accurately reflect the student's current performance in the class.

For example: If the transfer is happening at the middle of the grading period, and roughly half of the class grades are entered, you'll probably want to use a weight of 50%. The student's average will then be transferred to the new class and count for 50% of the total grade for the remainder of the grading period.

Initially, the student's average will transfer over exactly. Then, once other assignments get graded, their Total grade will be calculated by applying the transfer weight to the transfer average, and the

remaining weight to all post-transfer scores. For more details on transfer average calculations, see the "Transfer Average Explanation" section.

Transferred averages will appear on the Instructor > Scores/Comments page for the grading periods in which the transfers were made. The transfer average will also show on progress reports. To view the transferred grade details go to <u>Main > Students > Rosters > Transfer Averages</u>.

Report Card Data:

If the subject is on a report card, choose to also transfer report cards grades and/or comments.

Transfer Dates: Enter the last day the student will be in the class. The first day in the new class will be automatically calculated using the school's academic calendar.

Transfer

Transfer students from one class section to another section of the same class: (ex: Biology, section 1 to Biology, section 2) or from one class to a similar class: (ex: Algebra to 8th Grade Math)

- Transfer the student and the gradebook average from one class to another.
- Assign weights to maintain the student's class performance in the new class.

Note: Students will continue to show as "enrolled" in transferred classes to preserve their enrollment history.

Note: The student and class roster pages will show the transfer information. However, on other pages, you will NOT see the student for the classes they've transferred from. (Attendance, Scores/ Comments, Progress Reports, etc).

Certain conditions may exist that will not allow for student to transfers between classes:

- Grading Scale Mode Does Not Match: Percentages vs Points

- Different Grading Periods: Q1-Q4 to Fall-Spring: Grading periods must, at a minimum, contain the same periods, however, additional periods are allowed.

- Different Report Card Grading Scales: Classes must use the same grading scale. If the class grading scale is used on the report card, the scale grades and min % or points must be the same for both classes.

- Different Report Card Assessment Lists: Scores and Comments vs any other
- Student Already Enrolled: Student on the class roster, even if previously transferred out

Note: If you can't transfer to the desired class, go to <u>Students > Rosters > Edit</u> and manually transfer the student by setting the "Transferred Out" field.

Note: To move a student from one class to a completely different kind of class: (ex: Chemistry to Painting - basically add/drop), go to <u>Classes > Rosters > Copy</u>. Copy the student to the new class, then edit their roster enrollment details to have them marked "inactive" in the old class while preserving their grade.

19.2.5 Transfer Averages by Class

Modify transfer averages and weights for students in the chosen class. View current transfer averages/weights for all students from the class roster. Change averages and/or weights as needed to accurately reflect student's performance in class(es).

Γ	Transfer Averages												
(Class: 2008-09	127-Biolo	gy, Section	2, Birdman									
	Student	Grading Period	Average	Weight [?]									
		Q1	92	100									
	Austin Jane	Q2	96.67	90									
	Austin, Jane	Q3											
		Q4											
		Q1	96.67	100									
	Cruz Maria	Q2	90	25									
	Cruz, Maria	Q3											
		Q4											
	Save Back			•									
đ													

Main > Classes/Sections > Roster > Transfer Averages

Updates will appear in the "Transfer Average" column on the Instructor's "Scores/Comments" page. The student's total score will be recalculated to reflect the change(s).

Note: The Transfer Average only shows on the "transfer to" class for the grading period(s) in which the student transferred.

19.2.6 Transfer Averages Explanation

The "Transfer Average" column on the "Scores/Comments" page shows the averages transferred from the previous class, along with the transfer weight, for each transferred student.

		Quiz 3 🗮	Chapter Test 4-5 🚆	Final Exam 🗮	Points Scored	Points Possible	Transfer Average [?]	Total 🗮
Date Due		11/7	12/3	12/17				
Possible Pts		50	100	100				
Average		84	91	93.3				92.55%=A
Andrews, Todd	10	42	84	87	213	250		85.2%=B
<u>Austin, Jane</u>				97	97	100	96.67(90%)	96.7%=A
<u>Cruz, Maria</u>	101		98	96	194	200	92(25%)	95.75%=A

Initially, the transfer average will be the only score for the student.

As grades for assignments in the class are entered, the student's total score will reflect the combination of those assignment scores and transferred average, based on the transfer weight.

For example:

Jane Austin, above, has a transfer average of 96.67, with a weight of 90%. She got a 97 on her final exam in the new class. That score will carry the weight of the remaining 10%.

Her Total score is calculated as follows:

96.67 x .90 = 87 97.0 x .10 = 9.7 87.0 + 9.7 = Total score of 96.7

For any assignments graded in the new class, the Points Scored is divided by the Points Possible and then multiplied by the remaining % weight.

The result is then added to the Transfer Average, after it's multiplied by the transfer weight, for the Total score.

In another example:

For Maria Cruz, above, who transferred sooner, her average of 92 carries a weight of only 25%. She completed two assignments in the new class for a total of 194 points scored out of 200 possible. Those scores will carry the weight of the remaining 75%.

Her Total score is calculated as follows:

194 / 200 = 97 97.0 x .75 = 72.75 92.0 x .25 = 23 23 + 72.75 = Total score of 95.75 When using categories for your assignments, the calculation is a little more complex, but follows the same pattern.

		Total 🗮	Letter Grade	Problem Set 22 🚆	Chapter Quiz 6 🚍	Chapter Test 6 🚍	Q2 Participation 🚆	Problem Set 24 🚆	Test	Homework	Participation	Transfer Average [?]
Date Due				11/14	11/21	12/3	1/8	1/8				
Category				Homewo	Test	Test	Partic	Homewo				
Possible Pts				10	50	100	25	10	60%	20%	20%	
Average	iù	42.78	F	20	82.3	82.5	90	75	82.44	20.5	90	
<u>Austin, Tom</u>	10	93.8	Α	7	49	98	25	8	98	75	100	
<u>Jones, Maureen</u>	60	73.9	С	7	35	74	20	7	72.67	70	80	74(75%)

Maureen Jones, above, has a transfer average of 74, with a weight of 75%. Assignments completed for the rest of the class will carry the weight of the remaining 25%.

Each category score is calculated using their corresponding weight. The sum of all categories is then weighted by the remaining 25%.

Her Total score is calculated as follows:

First the category calculations are completed: Category "Test": 72.67 x .6 = 43.6 Category "Homework": 70 X .2 = 14 Category "Participation": 80 x .2 = 16 Sum of all categories: 43.6 + 14 + 16 = 73.6

Then, the remaining weight (25% for this example) is applied to that score: $73.6 \times .25 = 18.4$

Then, the transfer average is calculated using the transfer weight (75% for this example): $74 \times .75 = 55.5$

Finally, the two are added together for the Total score: 18.4 + 55.5 = 73.9

Transfer averages for points based grading scales are calculated similarly.

	Total 🛍	Letter Grade	Book 2	Vocabulary 2	Transfer Average [?]
Date Due			1/8	1/8	
Weight			1	1	
Average 🛍	3.3	S+	3	3.5	
Baker, Mandy 🛍	3.6	E	3	4	4(20%)
Connor, Ralph 🛍	3	S+	3	3	

Mandy Baker, above, has a transfer average of 4, with a weight of 20%. Assignments completed for the rest of the class will carry the weight of the remaining 80%.

Her Total score is calculated as follows:

Transfer average: $4 \times .2 = .8$ New assignment scores: $(3 + 4) / (1 + 1) \times .8 = 2.8$ Total Score: .8 + 2.8 = Total score of 3.6

19.2.7 Individual Grading Scale

View/modify class grading scale values for a chosen student. Assign the individual grading scale to classes on the student's roster. This can be useful for special needs students and those with an IEP.

Main > Classes/Sections > Roster > Grading Scale

	Individual Grading Scale Class: 2009-10 Phys Ed, Section 1 - Freshman, Chase						
	Student: Moore, E	mma	1				
	Letter Grade	Min %					
	A	80					
	В	70					
	С	60					
	D	40					
	F	0					
	Round up scores	above 0.5					
	Set Grading Scale Back						
•			▶				

View a student's existing scale or set a new individual grading scale for one or more classes.

Main > Classes/Sections > Roster > Grading Scale > Set Grading Scale

Set Individual Grading Scale Class: 2009-10 100-Keyboarding, Section 25 Student: Moore, Emma									
Letter Gra	ade Min	% Round Up	Ŀ	-					
A	80	Round Sco	ores Above	.5					
в	70								
с	60								
D	40								
F	0								
Refresh?	Instructor	Clas	S	Cla Sca	ss ile	Stud	ent Scale	Notes	
V	Winkler E	Keyboarding, Se	ction 1	Letter Grade A B C D F	Ain % 90 80 70 60 0	No gr scale	ading		
V	Chase B	Phys Ed, Section Freshman	1-	Letter Grade A B C D F	Ain % 90 80 70 60 0	Letter Grade A B C D F	Min % 80 70 60 40 0		
	Bradley B	Algebra, Section	1	Letter Grade A B C D F	Ain % 90 80 70 60 0	No gr scale	ading		
=	Birdman J	Geometry, Sectio	n 1	Letter Grade E S+ S- N		No gr scale	ading	This class uses a grading scale with different letter grades and can't be refreshed.	
				S+ S- N		scale		letter grades and can't be refreshed.	•

Note: If a completely different type of grading scale is needed, create a new class with the needed scale and assign special needs students to those class rosters.

20 Email Addresses

Each user logs into SchoolInsight using their email address and a password. When they login SchoolInsight verifies their password and routes them to the correct area of SchoolInsight. This is true for all users: admins, instructors, students, parents, etc.

For students and parents, SchoolInsight access is enabled on the "Email Addresses" page. You can also view login statistics to see when and how often parent/students are accessing SchoolInsight. **Note:** A different parent portal language (Spanish) can be set for each individual email address, as needed.

Email	Addresses				
Grade Lo	evel: 7 - Seventh Grade	•		Academic Year: 2010-11	
Mass F	Resend Search Back				
<u>Grade</u> Level	<u>Name</u> △	Email Address	Login Stats		
7	Austin, Tom	toma@au.com student email address	Count: 0 Last: Never First: Never Created: 8/16/2010 Welcome: Sent	edit <u>delete email</u> resend create parent <u>details logins</u>	
7	Creston, Daniel C. "Danny"	dc_test@dc.com student email address	Count: 0 Last: Never First: Never Created: 8/25/2008 Welcome: Not Sent	edit delete email resend create parent details logins	
	Mom Creston			add parent email	
7	Jacobs, Harry			create parent add student email	
	Mary Jacobs	maryj@mj.com parent email address Undeliverable: Address does not exist	Count: 1 Last: 11/5/2007 First: 11/5/2007 Created: 10/19/2007	edit delete email details logins	•
				•	

Main > Email Addresses

Select the academic year and grade level(s) to view students, parents and email addresses, if entered. **Note:** Email addresses resulting in <u>delivery failures</u> are noted in red.

Search

Search all of SchoolInsight for an existing email address. Once found, edit/delete/merge the email address or resend a welcome message. **Note:** Admins can only manage email addresses that belong to students/parent at their school. For more details see the "<u>Email Address Search</u>" section under Email/Announcements.

Add Student Email

Create an email account for this student with an initial password. You may choose to send a welcome email containing login and password information.

Create Parent

Create a contact for this student. You can enter an email address for the contact now or later using the "add parent email" link.

Add Parent Email

Add an email address for the selected contact/parent. An initial password will be provided. Send a welcome email to the contact with their login and password information. If your school uses Family/

Contacts, this contact's relationship with students will be provided and can be modified as needed.

<u>Edit</u>

Modify the chosen student/contact email address and/or password. Send a welcome email to the contact with their login and password information. Merge two email accounts together. For more details see the "Merge Accounts" section.

Delete Email

Remove an email address from the chosen student/contact.

Resend

Automatically resend a welcome email with login and password information to the chosen email account. This is helpful for students/parents who've misplaced their password.

Details

View which school(s) use the email address. If your school uses <u>Family/Contacts</u>, details for parents will show which students are linked to the parent.

Logins

View a history of successful/failed logins for a chosen student or contact. For more details see the " Login History" section under "Login".

Mass Resend

Send/resend a welcome email to parents and students, and notify them of their email addressess. Parents and students who haven't logged in or had an initial message sent will be pre-populated. **Note:** If your email address resulted in <u>delivery failures</u> you must update your account before sending email. Staff email addresses resulting in <u>delivery failures</u> are blocked and must be corrected.

20.1 Edit Email Address

Modify the chosen student/contact email address. Reset password and send a welcome email, as needed. Merge two existing email accounts.

Edit Ema	Addres	3				_
Contact:		Maria Jones				
Email:		mariaj@mj.com				
Parent Porta	Parent Portal Language: Spanish 💌					
*Reset Pas	word:					
Send Welco	Send Welcome Email? Yes					
	A	Il students this contac	t may have online a	ccess to (in	cludes past years)	
Student	Cu	istodial Status	Relations	nip	Web/Records Access	Receives Email
Hector Jone	S Custodia	l Parent/Guardian 💌	Mother	~	V	
* indicates o	tional field					<u> </u>
Save Bac	k					
•						

Main > Email Addresses > Edit

When editing a contact's email address, you can also modify their student's relationship and access status.

Email: Modify the existing email address. **Note:** Enter another existing email to merge two email accounts. For more details see the "<u>Merge Accounts</u>" section.

Parent Portal Language: Choose another language for this email address. When this person logs in, the Parent Portal will be displayed in the chosen language.

Reset Password: Reset a contact's password.

Send Welcome Email? Choose to send email to contact with login and password information.

If your school uses <u>Family/Contacts</u>, this contact's custodial status, relationship and web access, per student, can be modified.

Undeliverable Email:



If emails sent to this address result in <u>delivery failures</u>, access to the email address will be blocked and a warning generated. If SchoolInsight can determine the reason the send failed, it will be highlighted in red on the <u>Email Addresses</u> page. Email addresses must be corrected in order to send/ receive emails.

Correct your own account at <u>Main > Update Account</u>. **Note:** Admins with modify permissions can correct email for other Admins (Main > Admins > Edit) and/or Instructors (<u>Main > Instructors > Edit</u>). (Set admin permissions when assigning permission templates at Main > Admins > Create/Edit.)

20.2 Email Delivery Failures

SchoolInsight will automatically disable any email address in the system that results in a delivery failure.

This will prevent emails from being sent to or from erroneous email addresses, addresses blocking TE email, full mailboxes, etc.

The email address must be fixed before the user can send or receive emails.

For undeliverable student/contact email:

- An error message will appear at the top of their Parent Main page when they log in.
- If it can be determined, the cause of the error will also be displayed.

- The Student/Contact can correct their email address from Parent Main > Update Email/ Password.

- Instructors and Admins will see an error message for the student/contact on Instructor Main

> Email Addresses.

- Instructors and Admins can correct the email address from Instructor or Admin Main > Email Addresses > Edit.

For undeliverable instructor email:

- An error message will appear when the instructor tries to send email from SchoolInsight.
- If it can be determined, the cause of the error will also be displayed.

The Instructor can correct their email address from Instructor Main > Update Account.
 Admins with modify instructor permissions can correct the email address from Admin Main > Instructors > Edit.

For undeliverable admin email:

- An error message will appear when the admin tries to send email from SchoolInsight.

- If it can be determined, the cause of the error will also be displayed.

- The Admin can correct their email address from Admin Main > Update Account.

- Admins with modify admin permissions can correct the email address from Admin Main > Admins > Edit.

For undeliverable school district admin email:

- An error message will appear when the admin tries to send email from SchoolInsight.

- If it can be determined, the cause of the error will also be displayed.

- The SD Admin can correct their email address from School District Admin Main > Update Account.

- SD Admins can correct the email address from School District Admin Main > District Admins > Edit.

20.3 Merge Email Accounts

School Admins, Instructors and Parents/Students can merge existing email accounts when updating email addresses. The result is one email address for the merged person's accounts.

Caution: Use care when merging accounts as this cannot be undone. Once email accounts are merged, the email address for both person's accounts will always be the same. If separate emails are required later, you'll need to delete one person's email and then add a new email address for them.

- Admins can merge accounts when editing parent/student emails at <u>Main > Email Addresses > Edit</u> or when editing student's email at <u>Main > Students - Multi View > Contacts/Family</u>.
- Instructors can merge accounts from Instructor Main > Email Addresses > Edit.
- Parents can merge accounts from Parent Main > Update Email/Password. **Note:** For security reasons, parents must know the password to both account email addresses to complete a merge.

To merge two account emails together, edit the current email address on one of the pages noted above. This will be the email that once merged, will no longer exist. Then, enter a second email address that also exists in SchoolInsight and click "Save". You'll be automatically directed to the "Confirm Account Merge" page to confirm that you want both account emails merged. The current email address will be merged into the second email address for both accounts. Once merged, users will be able to access both accounts with a single email address.



Merge Accounts:

<u>Merge</u>

Confirm that you want to merge the "Current Account" into the "Second Account". Once merged, only the "Second Account" email address will exist in SchoolInsight, however, all data associated with both accounts will be preserved.

A confirmation of the merge will be shown once completed:

<rmb@ip.com> successfully merged into <bjb@ip.com>

21 Reports

Student and academic reports can be generated for your school.

Note: Available reports differ depending on which SchoolInsight modules have been purchased.

Main > Reports

Reports					
Student Info Custom Reports	Academics Progress Report	Planning <u>State Standards Coverage</u>	Attendance Overall Statistics	Staff Employee Details	
Custom Form	Gradebook - Eligibility	Course Standards Coverage	Individual Student Details	Teacher Quality	
Enrollment/Withdrawal	Report Card - Class Rank	Class Standards Coverage	Details for Week/Month	Class Quality	
Subgroups	Report Card - Honor Roll	Standards Coverage Charts	Truancy		
Homeroom Lists	Report Card - Yearly GPA		Perfect Attendance		
Class Lists	Report Card - Failing/Low		Tardy Students		
Entry Codes	Grades		Details for Day		
Promotion/Graduation	Gradebook - Failing Subgroups		Missing/Problems		
Transportation Report	Gradebook - Grades				
Bus Report					
Birthday Lists					
ID Cards					

The Basic Setup Admin Guide covers the basic "Student Info" and "Staff" reports and the State Standards Coverage report.

See the Grade Reporting Admin Guide for details on Report Card <u>Academics reports</u>. See the Lesson Plans & Curriculum Mapping Admin Guide for details on <u>Planning reports</u>. See the Attendance Admin Guide for details on <u>Attendance reports</u>.

21.1 Custom Reports

Custom reports gives you the flexibility to create, save and generate complex, highly customized reports without the need for programming skills. Use the "Query Builder" to guide you through creating/modifying custom reports. Choose from detailed or summary reports. Filter report output using student data fields, including custom fields. Query contact information. Easily generate many types of output including email, printable letters, mailing labels, etc. **Note:** Available filters and data fields vary depending on which SchoolInsight modules have been purchased.

Custom Reports				
			Academic Year:	2010-11
Report	Туре	Format	Created By	
2008-09 9th grade students/contacts	Details	Normal Web Page	Adam Admin	run edit delete
2009-10 10th Graders	Details	Normal Web Page	Adam Admin	run edit delete
Gender by Grade Level	Summary	Normal Web Page	Adam Admin	run edit delete
Active 2009-10 10th Graders	Details	Normal Web Page	Brenda Bradley	run edit delete
Active 9th Graders	Details	Printable Page	Brenda Bradley	run edit delete
Bus Route	Details	Email	Brenda Bradley	run edit delete
contact list without prevent all contact	Details	Normal Web Page	Brenda Bradley	run edit delete
Subtotals with Graph	Summary	Normal Web Page	Brenda Bradley	run edit delete
Verify Information	Details	Printable Letter	Brenda Bradley	run edit delete
Show reports saved by other admins				
Create a New Report - Query Builder	Back			

Main > Reports > Custom Reports

Saved reports are available for all academic years. Once saved, reports can be modified as needed using the query builder. Jump to any tab to make modifications. For example, to produce the same report in a different output format; edit the report and click the "Output" tab in the query builder, select an output type and generate the report in a different format.

Academic Year: Select the academic year to use when creating/generating new/existing reports. Data from that year is included in the report output when "Fields to Filter" = "Current Year".

Create a New Report - Query Builder

Use the query builder to select details for generating a new custom report.

<u>Run</u>

Generate an existing report using the query builder. Generate reports in the saved format or choose a new format. **Note:** Reports that existed prior to the "Custom Reports" redesign have been converted to the new format.

<u>Edit</u>

Modify an existing, saved report using the query builder. This will take you through the same steps used when creating a new report. Save changes to update the existing report, or save them as a different report, under a new name. **Note:** Other admin's reports can be edited and saved. When saved, the report is assigned to you ("Created By") and does NOT change the original report.

Show reports by other admins: View, generate reports saved by other admins. Save the report "as is" or with modifications to create your own copy. **Note:** The report can be saved with the same name since your own copy is saved, the original is left untouched.

Delete

Remove a saved report from the system. **Note:** Use caution when deleting reports as this cannot be undone. **Note:** Reports can be deleted only by the admin that saved them.

21.1.1 Query Builder

Use the query builder to create new or modify/run existing custom reports. Use the New Report -Query Builder to create new customized reports. Select information under each tab to define report details. Save reports to run again.

Two basic types of reports are provided, detailed and summary:

- Detailed reports provide a powerful way to use all of the student information stored in SchoolInsight and generate numerous types of output.
- Summary reports are useful when you need to look at overall numbers of students fitting into specified demographics, often used for state reporting. Choose to show subtotals to further breakdown student data. Additionally, graphs can be generated for summary reports.

Create a Report - Query Builder									
	Report Type Filters Data Sorting Output								
	Choose the type of report to run.								
	Data to Query [?]	Details R	eport [?]					
	✓ Students	First Name	Last Na	ime G	Grade Level	Gender	Phone Number		
	Contacts	Susan	Adams	2		F	555-7777		
		Jane	Doe	1		F	555-1234		
	Discipline Incidents	John	Doe	2		м	555-1234		
	E Fees	Joe	Smith	1		М	555-9999		
		Cummon	Donor	-+ /Div	(of Toble)	[2]			
			керо		ot rable)	11			
		IM Show	Subtot	tals					
		Condition		Gend	ler				
		Grade Level	Male	Fema	ile Total				
		First Grade	23	20	43				
		Second Grade	e 27	24	51				
		Third Grade	25	31	56				
		Total	75	75	150				
		-							
	Generate Save As Back to Custor	n Reports							_
┛									•

Main > Reports > Custom Reports > Query Builder

First, determine the type of report to create/generate and select the data to query. Available tabs/ options vary based on report type, however, "Filters" are common to both types.

Generate

Generate a report. Generate the report at any time to check that it contains needed data and is properly formatted.

Save As

Save the report with a descriptive name. Save a new report, save an existing report with the same or a new name.

Back to Custom Reports

Return to the "Custom Reports" page to create/edit/run reports.

21.1.1.1 Data to Query

Enable other information to be queried when building reports. Note: Student data is always queried.

Contacts

Enable contact data to be queried in order to use contact related filters and include contact information on the generated report.

Contact Receives Mail	Tes Yes €
Only send one letter per contact (useful for parents with multiple children)	
For mail, identify multiple contacts with the same mailing address (useful for sending one letter to two parents in the same household)	
Contact Custodial Status	Custodial Parent/Guardian 💌 🕂 clear

Generate only one report (letter) per contact and/or per parent to eliminate duplicates for parents at the same address and/or with multiple students.

Choose additional contact filters for the generated report, e.g. custodial status, relationship, etc.

Discipline Incidents

Enable discipline incident data to be queried. Generate details or summary reports to review discipline incident data. Commonly used reports are provided with default settings. Modify settings to meet your reporting needs.

Summary reports are initialized with 4 different choices of data to calculate:

- Count of Incidents Number of unique incidents per month and grade level
- · Count of Actions Total number of actions assigned to incidents
- Sum of Length of Actions Total duration of all incidents
- Count of Distinct Students Number of unique students involved in incidents

The "Grouping" tab is initialize to generate reports showing incident information per month/year for each grade level:

Incident Date (by Month/Year)	Grade Level(1)	Grade Level(2)	Total
Incident Date (by Month/Year)(1)			
Incident Date (by Month/Year)(2)			

Fees

Enable fee data to be queried. Generate details or summary reports to review fee data. Commonly used reports are provided with default settings. Modify settings to meet your reporting needs.

Summary reports are initialized with 2 different choices of data to calculate, showing charges and/or payments:

- Sum of Amounts Net sum total of all account charges and/or payments
- Count of Fees Total number of fees for charges and/or payments

The "Grouping" tab is initialized to generate reports showing fee totals per category for each account:

Account	Category	Total
Account(1)	Category(1)	
	Category(2)	
Account(2)	Category(1)	
	Category(2)	

21.1.1.2 Filters

Filters are common to both the details and summary reports. Use filters to create powerful search combinations for generating custom reports. Filter criteria details are listed at the top of the each generated report.

		1
Fields to Filter	Possible Values	
Academic Year	Current Year VR	<u>clear</u>
	≤ ▼ 2010-11 ▼ OR	
	≥ ▼ 2007-08 ▼ +	
Contact Receives Mail	= ▼ Yes ▼ +	<u>clear</u>
Only send one letter per contact (useful for parents with multiple children)		
For mail, identify multiple contacts with the same mailing address		
(useful for sending one letter to two parents in the same household)		
Homeroom	≠ ▼ [No value entered] ▼ +	<u>clear</u>
Contact Email	contains 💌 @schooldist.org +	<u>clear</u>
Enrollment Status	Active +	<u>clear</u>
	Effective Date:	
Add Another Filter	🗌 Sort fields alphal	petically

Main > Reports > Custom Reports > Query Builder > Filters

Fields to Filter:

- Filter report output using student data fields, including custom fields. Filter by year, school, enrollment status, demographics, etc. Only data that matches the filter will be included. (See <u>Student Search</u> for more details on searching for a specific student.)
- Fields can be chosen multiple times. This is useful when using multiple functions for a range of data (<, >, etc).
- Add multiple "Fields to Filter" to search for "AND" combinations match all instances, i.e. this and that and ...

Possible Values:

- Use various functions (=, <, >, contains, etc.) with data field values to create numerous combinations.
- Certain fields can use the "contains" function with a possible value, such as "Email". This provides an easy way to find persons with common email addresses, such as, all parents with district email.
- Find fields that are empty using "= [No value entered]"
- Add multiple "Possible Values" for a field to search for "OR" combinations find any instances that match, i.e. this or that or ...
- For values that include an "Effective Date", if left blank, the default is "today's" date.

Note: To filter a field using all possible values, leave the "Possible Values" box blank.

Add Another Filter

Enter another field to filter with possible values.

<u>Clear</u>

Remove the field to filter and all possible values.

Sort fields alphabetically: Available fields are defaulted to appear in common data groupings. If you prefer to view them in an alphabetical list, select this option. Enter a letter/phrase to quickly find a field.

Report Example:

A simple report to generate would be a report of students in a single grade level. Add "Grade Level" as a field to filter, then select a grade level from the 'Possible Values' dropdown menu with the "=" function. All students in the chosen grade level will be matched for the current academic year.

Another common field to filter, student enrollment status, formerly "Active", has been redesigned. Student enrollment status is determined by entry/exit dates. Status can be active, inactive or future. To only find active students in the example above, add the field to filter "Enrollment Status" = "Active" and select an effective date, if needed. The effective date defaults to today's date if left blank.

Use "Enrollment Status" to find students that are currently inactive, find all active students and/or find students that are enrolled for a future date. Students with dates in the future will automatically become active on their "Entry Date".

Student Full Name	Grade Level	Enrollment Status	Entry Date	Exit Date
Adam Arnought	11	Inactive		8/25/2010
Tom Austin	8	Active	8/25/2010	
Jane Austin	11	Active	8/25/2010	
Bob B. Baker	11	Active	8/25/2010	
Bill Bradey	11	Inactive		10/5/2010
Bill Bradey	11	Inactive	1/3/2011	
Bill Bradey	11	Future		10/5/2010
Bill Bradey	11	Future	1/3/2011	
Tom Chen	5	Future	1/3/2011	
Danny C. Creston	8	Active	8/25/2010	
Harry Jacobs	8	Active	8/25/2010	

Below is an example of a details report using the example outlined above:

21.1.1.3 Details Report

Generate highly customized, detailed reports using student demographic data. Filter on student data, including custom data. Narrow student list using filters, such as, enrollment status, grade level, class, homeroom, advisor, etc. Select data to show on report. Sort results by chosen field(s). Generate multiple outputs.

reate a Report - Query Builder			
Report Type Filters Data Sorting Outp	put		
Define filter criteria to find specific students (ie - 7th graders v	with IEPs). [?]		
Fields to Filter	Possible Values		
Academic Year	= Current Year - +	<u>clear</u>	
Enrollment Status (Active)	= Active - +	<u>clear</u>	
	Effective Date: 8/25/2010		
Grade Level	≤ ▼ Eighth Grade ▼ +	<u>clear</u>	
Grade Level	≥ ▼ Sixth Grade ▼ +	<u>clear</u>	
Add Another Filter			Sort fields alphabetically
Report Type			Data 🕥
Generate Save As Back to Custom Reports			

Main > Reports > Custom Reports > Query Builder > Details Report

Use the query builder to define information for a generated report. Follow the arrows to move through the query builder or click the tabs at the top to jump to an area. Generate and save the report to run again. Go back to the custom reports main page to start over.

Filters: Filter report output using student data fields, including custom fields. Only data that matches the filter will be included. (See <u>Student Search</u> for more details on searching for a specific student.) For more details on using filters see the "<u>Filters</u>" section of the query builder for custom reports.

Sort fields alphabetically: Available fields are defaulted to appear in common data groupings. If you prefer to view them in an alphabetical list, select this option. Enter a letter/phrase to quickly find a field.

Below is an example of a printable report for active 9th grade students with custodial parent/ guardians, sorted by last name:

	Cı	istor	n Stude	ent Rep	ort						
Academic Year: 2008 - 2009 Contact Custodial Status: Custodial Parent/Guardian Grade Level: 9 - Ninth Grade											
Student Last Name	Student First Name	Grade Level	Contact Last Name	Contact First Name	Contact Relationship	Contact Home Phone					
Austin	Jane	9	Austin	Melissa	Mother	555-555-5555					
Baker	Bob	9	Baker	Betty	Mother	555-555-6666					
Cruz	Maria	9	Cruz	Anna	Mother	555-555-6721					
Hernandez	Sofia	9	Josten	Jennifer	Stepmother	555-555-0789					
Jones	Hector	9	Jones	Maria	Mother	555-555-5635					
Long	Michael	9	Harvey	Amanda	Foster Parent	555-555-9021					
Smith	Amanda	9	Smith	Robert	Father	555-555-9876					
Victor	Ronald	9	Riedy	Matthew	Stepfather	555-555-7645					
Wade	Robert	9	Wade	Mary	Mother	555-555-4562					
Total: 9											

21.1.1.3.1 Data

Choose data fields to show on the generated report and their order of appearance.

Details > Data

Report Type	Filters	Data	Sorting	Output			
Choose which co	lumns to sho	w, and in	which order t	hey appear o	on the repor	rt.	
Available Fields:	1						
Gender						▼ Add	
🗌 Sort fields a	Iphabetically						
Fields to Show: Student Full N Mailing Addres Gender	ame s All Fields	Rem Move Move	ove e Up e Down				
Filters						Sorting 🚺	

Select the fields that you want to be shown on the report using the "Add/Remove" buttons. These will

be your column headings.

Use the "Move Up/Down" buttons to sort the order that the columns will appear on the generated report.

21.1.1.3.2 Sorting

Select the sort order for the generated output.

Details > Sorting

Report Type Filter:	Data Sorting Output
Define the sort order of th	e results.
Available Fields:	
	▼ Add
Sort by:	
Student Last Name Gender	
	Remove
	Move Up
	Move Down
	Descending
<u> </u>	
Oata	Output 🕥

Sort generated report alphabetically or by data groups.

21.1.1.3.3 Details Output

Select a report output type and corresponding options.

Details > Output

Re	port Type Filters Data Sorting Output	
Defir	ne the format of the report.	
0	Normal Web Page	
0	Printable Page	
0	Mailing Labels	
0	Envelopes	
0	Comma Delimited (CSV)	
©	Printable Letter <u>Template:</u> Bus Route Information ▼ □ Print School Header ▼ Letters Per Page 3 ▼ Show only students lacking contacts with email addresses	
0	Email	
<	Sorting	

Select which output type to generate, web, label, letter, email, etc. Additional options are shown for each type once selected.

Use letter templates for printed letters and email.

21.1.1.4 Summary Report

Generate a custom summary report of overall student demographic counts. Quickly summarize and analyze large amounts of data in table or graph format. View student counts in various ways, by grade level, ethnicity, gender, etc. Customize output using groupings and filters. Generate graphs of summary data. Choose to include subtotals to further breakdown student data. The summary report also provides links to student details.

Create a Report - Query Builder		
Report Type Grouping Graphs Filters	Drill Down Output	
Define filter criteria to find specific students (ie - 7th graders	with IEPs). [?]	
Fields to Filter	Possible Values	
Academic Year	= Current Year 💌 🕂	<u>clear</u>
Enrollment Status (Active)	= Active +	clear
	Effective Date: 8/25/2010	
Grade Level		clear
Gender		clear
Add Another Filter	'	Sort fields alphabetically
Graphs		Drill Down 🜖
Generate Save As Back to Custom Reports		

Main >	Reports >	Custom Reports >	Query Builder >	Summary Report
--------	-----------	------------------	-----------------	-----------------------

Use the query builder to define information for a generated report. Follow the arrows to move through the query builder or click the tabs at the top to jump to an area. Generate and save the report to run again. Go back to the custom reports main page to start over.

Filters: Filter report output using student data fields, including custom fields. Only data that matches the filter will be included. (See <u>Student Search</u> for more details on searching for a specific student.) For more details on using filters see the "<u>Filters</u>" section of the query builder for custom reports.

Below is an example of a summary report with subtotals:

		Ra	ice-Asian		Race-Black	or African A	merican	Ra	ace-White		Race	-Unassigr	ed	Race	e-Multiraci	ial		Total	
Grade Level	Has IEP	Gender Male	Gender Female	Total	Gender Male	Gender Female	Total	Gender Male	Gender Female	Total	Gender Male	Gender Female	Total	Gender Male	Gender Female	Total	Gender Male	Gender Female	Total
5 - Fifth Grade	No	2	2	<u>4</u>	<u>13</u>	<u>10</u>	<u>23</u>	<u>137</u>	165	<u>302</u>	<u>29</u>	<u>29</u>	<u>58</u>	<u>10</u>	<u>9</u>	<u>19</u>	<u>191</u>	215	<u>406</u>
	Yes				1	1	2	<u>16</u>	<u>6</u>	22	1	<u>5</u>	<u>6</u>	<u>3</u>	2	<u>5</u>	21	<u>14</u>	<u>35</u>
	Sub-Total	2	2	<u>4</u>	<u>14</u>	<u>11</u>	<u>25</u>	<u>153</u>	171	<u>324</u>	<u>30</u>	<u>34</u>	<u>64</u>	<u>13</u>	<u>11</u>	24	212	<u>229</u>	441
6 - Sixth Grade	No	2	<u>4</u>	<u>6</u>	<u>8</u>	<u>13</u>	21	<u>132</u>	151	<u>283</u>	26	23	<u>49</u>	7	7	<u>14</u>	175	<u>198</u>	<u>373</u>
	Yes		1	1	1		1	<u>13</u>	<u>13</u>	<u>26</u>	<u>8</u>	<u>6</u>	14	<u>3</u>		<u>3</u>	<u>25</u>	<u>20</u>	<u>45</u>
	Sub-Total	2	<u>5</u>	<u>7</u>	<u>9</u>	<u>13</u>	22	<u>145</u>	<u>164</u>	<u>309</u>	<u>34</u>	<u>29</u>	<u>63</u>	<u>10</u>	<u>7</u>	<u>17</u>	<u>200</u>	<u>218</u>	<u>418</u>
Total		<u>4</u>	<u>7</u>	<u>11</u>	<u>23</u>	<u>24</u>	<u>47</u>	<u>298</u>	<u>335</u>	<u>633</u>	<u>64</u>	<u>63</u>	<u>127</u>	<u>23</u>	<u>18</u>	<u>41</u>	<u>412</u>	<u>447</u>	<u>859</u>

Totals are shown at the bottom of each column.

Click a number link to view student details. Choose to save the details as a new report, as needed.

21.1.1.4.1 Grouping

Organize and group data to help find important trends. Choose to include subtotals to further breakdown student data.

Define how the r	results are g	rouped. [?]							
Available Fields	:								
Grade Level				▼ Ac	d Row	Add Col	umn		
Sort fields :	alphabeticall	у							
Rows:			c	Columns:					
Grade Level	Properti	ies	1	Race	Properties	1			
	Remove			Gender	Remove	-			
	Maxim 11				Maurallin				
1	Iviove U	P I			wove up 1				
	Move D	own			Move Dow	n			
Preview:	Move D	own			Move Down	n			
Preview:	Move D Rac	e(1)	Rac	e(2)	Move Down	n tal			
Preview: Grade Level	Move D Move D Rac Gender(1)	e(1) Gender(2)	Rac Gender(1)	e(2) Gender(2)	Move Op Move Down To Gender(1)	n tal Gender(2	2)		
Preview: Grade Level Grade Level(1)	Move D Move D Rac Gender(1)	e(1) Gender(2)	Rac Gender(1)	e(2) Gender(2)	Move Op Move Down To Gender(1)	n tal Gender(2	2)		
Preview: Grade Level Grade Level(1)	Move D Move D Rac Gender(1)	e(1) Gender(2)	Rac Gender(1)	e(2) Gender(2)	Move Op Move Down To Gender(1)	n tal Gender(2	2)		

Summary Report > Grouping

Select rows and columns from available fields. Columns can have a maximum of 2 groupings. Rows can have unlimited groupings.

Note: Available fields can only be chosen once.

Select the fields that you want to be shown on the report using the "Add/Remove" buttons. These will be your column/row headings.

Note: To quickly find a field, type part/all of the field name.

Use the "Move Up/Down" buttons to sort the order that the columns/rows will appear on the report.

A preview is provided to show the generated report format.

21.1.1.4.2 Graphing

Generate graphs of the summary report data.

	Q. No Cropho	
What to Graph:	 Graph each column 	
	C Graph each row	
Graph Type:	Bar Chart	
	• All columns in a single chart	
Options:	C Each Race in a separate chart	
	C Each column in a separate chart	
Graph Size:	Medium 💌	

What to Graph: Graph by row or column, default is column for new reports.

Graph Type: Select from six different graph types to meet your reporting needs.

Options: View data in a single chart or separate each row or column into it's own chart. When two or more fields are grouped in a row/column, additional graphing options are available. Separate charts can be generated based on the first field in the column or row.

Note: When sub-totals are included on the summary report, generated charts will show each sub-total and an overall total.


21.1.1.4.3 Drill Down

Select drill down data to show for summary values.

Summary Report > Drill Down

	Report Type Grouping Graphs Filters Drill Down Output	_
	Choose which fields to show when clicking on a summary total.[?] Available Fields:	
	Grade Level Add	
	Fields to Show: Student Full Name Gender Grade Level Properties Remove Move Up Move Down	
	G Filters	Output >
•		

Choose which information is shown when viewing details on a generated summary report.

This is the data viewed when clicking a number link from the summary output.

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21.1.1.4.4 Summary Output

Determine the report output type:

Summary Report > Output

	Report Type Grouping Graphs Filters Drill Down Output	_
	Define the format of the report. [?]	
	Normal Web Page	
	O Printable Page	
	S Drill Down	-
•		•

Select the output type, web page or printable report.

Normal web page will generate a report that can be drilled down into details behind the totals.

21.2 Custom Form

SchoolInsight provides schools with the ability to create custom forms. These are useful for requesting information from parents and students, such as annual school year registration. An initial form is provided which can be modified using an interactive template. Customized forms can be saved for repeated use and modification. When the forms are generated, student information from SchoolInsight is automatically populated on the printable forms.

Main > Reports > Custom Form

The first step in using a custom form is to design a form to meet your specific needs.

Then, generate forms with student/contact information, and print them from your browser for distribution.

21.2.1 Design Form

The first step in creating a custom form is to design the form for your specific needs. Start with the existing preview or use a previously saved form. Design a form by adding/removing or moving fields, modifying the overall layout and/or modifying field details (text). Once saved, the form can be generated for students in a chosen academic year.

	Des	sign Form		
Available Fields:		Pro	eview:	-
-Comments-	2008-2009 Lincoln Schoo	ol Registration Form	A	
Add Field>	Student Data			
	Please review and correct	the student information bek	ow.	
Selected Fields:	Student First Name		Student Middle Name	
Contact Name	Student Last Name		Birth Date	
Contact Relationship	Grade Level		Gender	
Contact Home Phone	Race (Please check one)		Disability	
Contact Work Phone	Asian D Black	White	-	
Contact Cell Phone Contact Address All Fields	Hispanic 🗌 Am	erican Indian		
Contact Email Address	Multiracial			
	Primary Language		Student Email Address	
	Please review and correct Contact Name Contact Home Phone Contact Cell Phone Contact Can Pickup	the contact information bek Contact Relationship Contact Work Phone Contact Address All Field Contact Email Address	ow.	
	Contact Name	Contact Relationship	7	
	Contact Home Phone	Contact Work Phone	-	
	Contact Cell Phone	Contact Address All Field	is	
	Contact Can Pickup	Contact Email Address		
	(
☑ Save as: 08-09 registration				
Generate Back				-

Main > Reports > Custom Form > [Preview]

The preview area is an interactive template. To modify existing fields, choose fields either from the "Selected Fields" dropdown or within the "Preview". Once selected, field properties are displayed to the left of the preview and highlighted within the preview. Then, modify the field properties as needed. The different types of fields and their properties, <u>General Settings</u>, <u>Headers and Comments</u>, <u>Table Fields</u> are discussed in following sections.

Available Fields: Add new fields to the form.

- First, select the new field position by clicking an existing field either from the "Selected Fields" dropdown or within the "Preview".
- Select the new field from the "Available Fields" dropdown.
- Click Add Field to add the new field after the selected existing field.

Selected Fields: List of all fields that are currently being used on the form, in the order they appear in the "Preview" displayed.

Save as: To save your form, check the box and give it a descriptive name, then "Generate" a form.

Generate

Saves a new form under the given name and generates a preview. See more details in the <u>Generate</u> Form section.

21.2.1.1 General Settings

Modify properties that affect the overall layout of the form and it's title.

Main > Custom Form > [General Settings]

	Desig	n Form		-
Available Fields:		Pr	review:	
-Comments-				
And Early S	2008-2009 Lincoln Schoo	Registration Form		
Add Field>	Student Data			
	Please review and correct t	he student information be	low.	
Selected Fields:	Student First Name		Student Middle Name	
General Settings	Student Last Name		Entire Mailing Address	
-Show Blank Row-	SSN		Birth Date	
-Header: Student Data	Grade Level		Gender	
-Show Blank Row-	Race (Please check one)	_	Disability	
-Show Blank Row-	Asian Black	White		
-Comments: Please review and co	🗌 🗌 Hispanic 🔲 Ame	rican Indian		
-Show Blank Row-				
Student First Name	I Multiracial			
	Primary Language		Student Email Address	
General Settings: X	Contacts Data Please review and correct t	he contact information be	low.	
Title: 2008-2009 Lincoln School	Contact Relationship	Contact Home Phone	-	
	Contact Work Phone	Contact Cell Phone	-	
Columno: 2 -	Contact Address All Fields	Contact Can Pickup	-	
	Contact Email Address	Contact Carrinovap	-	
	Contact Name			
	Contact Relationship	Contact Home Phone		
	Contact Work Phone	Contact Cell Phone	-	
	Contact Address All Fields	Contact Can Pickup	-1 -	
	Contact Email Address			
			-	-
L				
				Þ

Select the "General Settings" field from the "Selected Fields" dropdown or click the form title in the "Preview". The "Settings" will appear to the left of the "Preview".

General Settings: X - Closes the settings display.

Title: Title that appears at the top of the form. Edit to suit your needs. **Number of Columns:** Set the number of columns you wish to have available across the form.

Contact Settings:

Number of contacts to show: Select the number of student contact tables to include on the form.

Contacts who can pick up student: Include contact data on the generated form for contacts that can/cannot pick up students.

21.2.1.2 Headers and Comments

Modify form headers and associated comments to meet your school's needs. Header and comments fields can have their text details edited.

	Design Form]_
Available Fields:	P	review:	
-Comments-	2008-2009 Lincoln School Registration Form Student Data Please review and correct the student information be	iow.	
Antonial Finitian	Student First Name	Student Middle Name	
Selected Fields:	Student Last Name	Entire Mailing Address	
Genaer 🔺	SSN	Birth Date	
Disability	Grade Level	Gender	
Primary Language Student Email Address -Header: Contacts Data -Comments: Please review and co	Race (Please check one) Asian Black White Hispanic American Indian Multiracial	Disability	
<u></u>	Primary Language	Student Email Address	
Properties: X	Contacts Data Please review and correct the contact information be Contact Name	low.	
	Contact Relationship Contact Home Phone		
Move:	Contact Work Phone Contact Cell Phone		
Remove Field	Contact Address All Fields Contact Can Pickup		
	Contact Email Address		
Please review and correct the	Contact Name		
contact information below.	Contact Relationship Contact Home Phone		
	Contact Work Phone Contact Cell Phone		
	Contact Address All Fields Contact Can Pickup		
	Contact Email Address		
	-		
v			"
Refresh Preview			-
			í E

Main > Custom Form > [Header/Comment]

Select a "Header:" or "Comment:" to modify from the "Selected Fields" dropdown or click the field in the "Preview". The field's "Properties" will appear to the left of the "Preview".

Properties: X - Closes properties.

Field: Shows the field type. This cannot be modified.

Move: Adjust where the field appears in the table using < > to move it to the right or left of its current position.

<u>Remove Field</u>: Deletes the field from the table. **Note:** Add the field back by selecting it from "Available Fields".

Details: <u>Edit:</u> To modify the Header or Comment text, click the "Edit" button, change the text and "Save". The new header/comment appears in the preview.

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21.2.1.3 Table Fields

Modify fields within the Student and Contacts Data tables to meet your school's needs. Move fields around within a table, adjust field column sizes and/or add/delete fields.

	Design Form]-
Available Fields:	F	review:	
-Comments-	2008-2009 Lincoln School Registration Form Student Data Please review and correct the student information b	elow.	
Selected Fields: Gender Race Disability Primary Language Student Email Address -Header: Contacts Data	Student First Name Student Last Name SSN Grade Level Race (Please check one) Asian Black White Hispanic American Indian	Student Middle Name Entire Mailing Address Birth Date Gender Disability	
Properties: X Field: Contact Name	Multiracial Primary Language Contacts Data Please review and correct the contact information b Contact Name	Student Email Address	
Move: < > Columns: 2 + -	Contact Relationship Contact Home Phone Contact Work Phone Contact Cell Phone Contact Address All Fields Contact Can Pickup Contact Email Address		
Remove Field	Contact Name Contact Relationship Contact Home Phone Contact Work Phone Contact Cell Phone Contact Address All Fields Contact Can Pickup Contact Email Address		
L			

Main > Custom Form > [table field]

Select a field to modify from the "Selected Fields" dropdown or click the field in the "Preview". The field's "Properties" will appear to the left of the "Preview".

Properties: X - Closes properties.

Field: Name of the table field. This cannot be modified.

Move: Adjust where the field appears in the table using < > to move it to the right or left of its current position.

Columns: Change the number of columns in the form that the field uses. **Example:** If your form uses 3 columns (<u>General Settings</u>), the field will use an entire line if also set to 3 columns.

<u>Remove Field</u>: Deletes the field from the table. **Note:** Add the field back by selecting it from "Available Fields".

Note: Changes to a field in the "Contacts Data" table are applied to all instances.

21.2.2 Generate Form

Use saved forms to generate printable output. Print blank forms or select students based on chosen criteria. Student names and related data that's stored in SchoolInsight, such as addresses, contacts, etc., will be automatically entered on the forms.

Generate Forms							
	Academic Year: 2011-12						
	Run a Saved Form						
Form	11-12 registration delete						
	Show Which Students?						
0	No Students - Print a Blank Form						
0	Single Student: Type here to search for a Student. [clear]						
o	All students in Grade Level: 6 - Sixth Grade 7 - Seventh Grade 9 - Ninth Grade 12 - Twelfth Grade						
0	Class: 211-1-Geometry 1, Section 1						
0	Homeroom: Jay Birdman						
0	Advisor: Jay Birdman						
0	All students in school						

Main > Reports > Custom Form

Academic Year: Choose the academic year from which to select students.

Form: Select a saved form to generate or modify. Choose forms that have been saved by yourself, or by others in your district. You can delete an unused form, if needed.

Show Which Students?:

No Students - will print a blank form. This is a good way to preview what the form looks like prior to generating for many students.

Search for a single student or generate forms for all students in a grade level, class, homeroom, or for a chosen advisor, or all students in your school.

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		Contact Options (if applicable)	
	Number of contacts to show:	2 -	
	Custodial Status	Any	
	Web/Records Access	Any 🔽	
	Receives Email	Any	
	Receives Mail	Any 🔽 Do not send duplicates to a contact	
	Can Pick Up Student	Any 🔽	
	Prevent All Contact with Student	Any	
	Hide students with no matching contacts		
		Sort Students By?	
	Last Name		•
•			

Set contact options, as applicable. Determine a sort order for the generated forms.

Generate

Generate the form(s) based on chosen selections. Once generated, print the forms from your browser.

Below is an example of a generated form with student and contact information automatically entered from SchoolInsight data.

Please review and correct the student information	n below.
First Name: Bob	Middle Name: B.
Last Name: Baker	Mailing Address: 1234 Lane Watertown, IL 65555
SSN:	Birth Date: 3/1/1994
Grade Level: 10	Gender: M
Race (Please check one) Asian Black I White Hispanic American Indian Multiracial	Disability:
Primary Language: English	Student Email Address: bbb@ip.com
Contacts Data Please review and correct the contact information	n below.
Contacts Data Please review and correct the contact information Name: Betty Baker Contact Relationship: Mother	h below. Home Phone: 555-555-6666
Contacts Data Please review and correct the contact information Name: Betty Baker Contact Relationship: Mother Work Phone:	Home Phone: 555-555-6666 Cell Phone:
Contacts Data Please review and correct the contact information Name: Betty Baker Contact Relationship: Mother Work Phone: Address: 1234 Lane Watertown, IL 65555	Home Phone: 555-555-6666 Cell Phone: Can Pick Up Student?: T
Contacts Data Please review and correct the contact information Name: Betty Baker Contact Relationship: Mother Work Phone: Address: 1234 Lane Watertown, IL 65555 Email Address: bjb@ip.com	Home Phone: 555-555-6666 Cell Phone: Can Pick Up Student?: T
Contacts Data Please review and correct the contact information Name: Betty Baker Contact Relationship: Mother Work Phone: Address: 1234 Lane Watertown, IL 65555 Email Address: bjb@ip.com Name: Robert Baker	Home Phone: 555-555-6666 Cell Phone: Can Pick Up Student?: T
Contacts Data Please review and correct the contact information Name: Betty Baker Contact Relationship: Mother Work Phone: Address: 1234 Lane Watertown, IL 65555 Email Address: bjb@ip.com Name: Robert Baker Contact Relationship: Father	Home Phone: 555-555-6666 Cell Phone: Can Pick Up Student?: T Home Phone: 555-555-6666
Contacts Data Please review and correct the contact information Name: Betty Baker Contact Relationship: Mother Work Phone: Address: 1234 Lane Watertown, IL 65555 Email Address: bjb@ip.com Name: Robert Baker Contact Relationship: Father Work Phone:	Home Phone: 555-555-6666 Cell Phone: Can Pick Up Student?: T Home Phone: 555-555-6666 Cell Phone:

21.3 Autodialer Report

Generate a report of student/contact phone numbers to use with an autodialer.

Autodialer Re	port
	Academic Year: 2009-10
File Type:	AlertNow
Student(s):	 Grade Level 7 - Seventh Grade 9 - Ninth Grade 10 - Tenth Grade 11 - Eleventh Grade 12 - Twelfth Grade 12 - Twelfth Grade O Homeroom
Fields to Show:	Student Last Name Student Last Name Grade Level Student Number Student Number Student Full Name State ID Number Add> Student Email Address Add> Contact Last Name Contact Home Phone Contact Relationship Remove <
l	

Main > Reports > Autodialer Report

School: Select a school for the generated report or include "All".

File Type: Select which autodialer file type output to generate.

Students: Select students by grade level or homeroom. Narrow list as needed. **Note:** Only students with an enrollment status of active/future, as of the current date, will be included.

Fields to Show: Select the fields that you want to be shown on the report using the "Add/Remove" buttons. Use the "Move Up/Down" buttons to sort the order that the columns will appear on the generated report. **Note:** Only contacts with "custodial parent/guardian" status will be included on the report.

	Options:	 Show all phone numbers on one line Hide inactive students Hide rows with no phone numbers Show school name 	
	Where Shown?	 ○ Normal Web Page ○ Printable Page ○ Comma Delimited (CSV) ☑ Show Header Row 	
•	Generate Report	Back	

Options: Select options to use when generating the report output.

Where Shown: Generate a normal web page, printable page, or create a .csv file to use for importing numbers into an autodialer.

Below is an example of a generated report:

	Autodialer Rep	ort						
	School Name: Linco Academic Year: 200	oln School 09 - 10						
	Contact Custodial Status: Custodial Parent/Guardian							
	Grade Level: Tenth Grade							
	Enrollment Status:	Active/Future as	of 11/18/2010					
	Back							
	Student Full Name	School Name	Phone	Contact First Name	Contact Home Phone	Contact Cell Phone		
	Jane Austin	Lincoln School	555-555-5555	Melissa	555-555-5555	555-123-1234		
	Jane Austin	Lincoln School	555-555-5555	Tony	555-555-5555	555-123-9876		
	Bob B. Baker	Lincoln School	555-555-6666	Betty	555-555-6666			
	Bob B. Baker	Lincoln School	555-555-6666	Robert	555-555-6666	555-123-6487		
	Hector Jones	Lincoln School	555-555-4821	Maria	555-555-4821			
	Michael Long	Lincoln School	555-555-9021	Amanda	555-555-9021			
	Amanda Smith	Lincoln School	555-555-9876	Robert	555-555-9876	555-908-3598		
	Robert R Wade	Lincoln School	555-555-4562	Mary	555-555-4562			
	Total: 8						-	
•						•		

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21.4 Enrollment/Withdrawal

Generate a report showing student enrollment or withdrawal for a chosen timeframe. **Note:** You're school must have purchased Core Student Management to use this report.

Enrollment Option	S
Academic Year: 2008-0	9 🔽
Report Type:	 Enrollment Withdrawal
Time Frame:	 Year Include Students With No Entry Code Grading Period 1 Month June 2009 Date Range Start: 8/25/2008 End: 8/25/2008
Grade Level:	EC - Early Childhood 2 - Second Grade 6 - Sixth Grade 8 - Eighth Grade 9 - Ninth Grade
Enrollment Entry Codes:	Normal Entry Transfer In Select All
Sorting:	Last Name
Options:	 Hide Inactive Students Show Student ID Number Show Address Show Date of Birth Show Gender Show Homeroom Teacher Printable
Generate Report Bac	k

Main > Reports > Enrollment/Withdrawal

Select a report type, timeframe and grade level for the report.

For report type of **Enrollment**:

- Choose to include students without entry codes in the report
 Select enrollment entry codes to include in the report
- Choose to hide inactive students

For report type of Withdrawal:

- Select enrollment exit codes to include in the report
- Choose to hide re-enrolled students

Below is an example of an enrollment report for all grade levels, all entry codes, including inactive students:

Enro	llment Re	eport						
Acaden Grade L	nic Year: 20 .evel: All	08-09						
Ent	гу Туре	Count						
Norma	I Entry	3 (75%)						
Transfe	er In	1 (25%)						
Total E	nrollments	4						
Grade	S	tudent	Entry Code	Entry Date	Exit Code	Exit Date	Status	
9	Baker, Dou	Ig	Normal Entry	8/25/2008	Dropped out	12/19/2008	Inactive	1
6	Creston, D	aniel C. "Danny	Normal Entry	8/26/2008				
9	Rodrigues	, Robert	Normal Entry	8/25/2008	Transfer Out	10/17/2008	Inactive	
8	8 Winkler, Thomas Transfer In 9/10/2008							
Back								
•							Þ	ŕ

Below is an example of a withdrawal report for 9th grade, all exit codes, hiding re-enrolled students:

	Withd	rawal Re	port					
	Academ Grade L	nic Year: 200 evel: 9	08-09	_				
	Ex	it Type	Count					
	Droppe	d out	1 (50%)				
	Transfe	r Out	1 (50%)				
	Total W	lithdrawals	2					
	Grade	Stude	nt	Entry Code	Entry Date	Exit Code	Exit Date	
	9	Baker, Dou	g	Normal Entry	8/25/2008	Dropped out	12/19/2008	
	9	Rodrigues,	Robert	Normal Entry	8/25/2008	Transfer Out	10/17/2008	
	Back							-
•							F	Γ

21.5 Subgroups

Generate a report of student enrollment details based on subgroups. Subgroup data is entered in the "Demographics" section on the "Student" pages. **Note:** You're school must have purchased Core Student Management to use this report.

Main > Reports > Subgroups

	Subgroup	os 🔺								
	Academic Ye	Academic Year: 2009-10 💌								
	Grade Level:	All								
	Options:	 Exclude data for inactive students? Printable? 								
4	Generate Re	eport Back								

Select an academic year and grade levels for the generated report.

Below is an example of a subgroup report:

	Subgroups															
	Academic Year: 2007-08															
	Grade Level	All	<u>Asian</u>	Black	White	<u>Hispanic</u>	American Indian	Disabled	Low Income	<u>LEP</u>	Male	<u>Female</u>	<u>Migrant</u>	Has IEP	Multiracial	
	к	<u>22</u> (100%)	<u>1</u> (4.55%)		<u>8</u> (36.36%)	<u>10</u> (45.45%)			<u>8</u> (36.36%)		<u>10</u> (45.45%)	<u>12</u> (54.55%)			<u>3(13.64%)</u>	
	1	<u>19</u> (100%)	<u>2</u> (10.53%)	<u>1</u> (5.26%)	<u>7</u> (36.84%)	<u>6(31.58%)</u>			<u>5</u> (26.32%)		<u>10</u> (52.63%)	<u>9</u> (47.37%)			<u>1(5.26%)</u>	
	2	<u>18</u> (100%)		<u>2</u> (11.11%)	<u>5</u> (27.78%)	<u>5(27.78%)</u>			<u>9(50%)</u>		<u>8</u> (44.44%)	<u>10</u> (55.56%)			<u>2(11.11%)</u>	
	<u>3</u>	<u>10</u> (100%)		<u>2(20%)</u>	<u>4(40%)</u>	<u>3(30%)</u>			<u>4(40%)</u>		<u>3(30%)</u>	<u>7(70%)</u>			<u>1(10%)</u>	
	<u>4</u>	<u>11</u> (100%)		<u>1</u> (9.09%)	<u>5</u> (45.45%)	<u>5(45.45%)</u>			<u>5</u> (45.45%)		<u>6</u> (54.55%)	<u>5</u> (45.45%)				
	<u>5</u>	<u>16</u> (100%)		<u>1</u> (6.25%)	<u>7</u> (43.75%)	<u>6(37.5%)</u>			<u>8(50%)</u>		<u>12(75%)</u>	<u>4(25%)</u>			<u>1(6.25%)</u>	
	<u>6</u>	<u>14</u> (100%)		<u>2</u> (14.29%)	<u>5</u> (35.71%)	<u>5(35.71%)</u>			<u>5</u> (35.71%)		<u>8</u> (57.14%)	<u>5</u> (35.71%)			<u>1(7.14%)</u>	
	Z	<u>13</u> (100%)			<u>8</u> (61.54%)	<u>3(23.08%)</u>			<u>6</u> (46.15%)		<u>8</u> (61.54%)	<u>5</u> (38.46%)			<u>2(15.38%)</u>	
	<u>8</u>	<u>9</u> (100%)			<u>5</u> (55.56%)	<u>4(44.44%)</u>			<u>4</u> (44.44%)		<u>2</u> (22.22%)	<u>7</u> (77.78%)				
	Back															Ŀ
•																

Click any link to view corresponding details.

21.6 Homeroom Lists

Generate a list of students by homeroom teacher. **Note:** Students must be assigned a homeroom teacher. This is done on the "Student" pages in the "Yearly Enrollment Info" section. **Note:** You're school must have purchased Core Student Management to use this report.

Homeroom Lis	its	
		Academic Year: 2011-12
Instructor:	Jay Birdman Brenda Bradley Brian Chase John Fairchild Karen Jones	
	Hide inactive students	
	Show grade level	
	Show student number	
	Show student phone number	
Options:	Show student address	
opuons.	Show locker information	
	Show Gender Statistics	
	Show school name	
	Printable Page	
	Show blank columns: 0	
·	1	
Generate Report	Back	
	Dack	

Main > Reports > Homeroom Lists

Select an academic year and teacher(s) for the generated student list.

To generate lists for multiple instructors, hold down the left mouse button as you scroll or use Ctrl, left click to select non-consecutive instructors.

Select options to include for the generated report. Add blank columns to the report to include handwritten information.

Homeroom List										
School: First Scho	ol									
Academic Ye	ar: 2009-10									
Instructor: N	lancy Kramer									
Grade Level	Student	Student Number	Phone	Address						
8	James, Susan	1071	555-1234	1234 Elm Parkside, IL						
8	Moore, Mary	1077	555-0987	938 Preserve Parkside, IL						
8	Moore, Tim	1075	555-9876	543 Maple Parkside, IL						
8	Patrick, Kim	1073	507-3894	8943 N. Court Parkside, IL						
8	Smith, Sam	1078	555-3847	8476 Mars Drive Parkside, IL						
8	Tammond, Tim	1079	555-1010	6 East Drive Parkside, IL						
Males: 3 Females: 3 Count: 6						-				

Below is an example of a printable homeroom list for a single teacher with 1 blank column:

21.7 Class Lists

Generate a report with student/contact information for chosen classes. Filter lists by daily period, semester and/or instructor, as needed.

All Daily Period: All Semester: All Instructor: Type here to search for an instructor. Instructor: 123-1-Algebra 1, Section 1 127-1L-Biology Lab 1, Section 1 127-1L-Biology Lab 1, Section 1 2010-1-Chemistry 1, Section 1 2011-Chemistry 1, Section 1 2011-Chemistry 1, Section 1 215-Health, Section 1 215-Health, Section 1 100-Keyboarding, Section 1 View Home School Grade Level Show Columns: Home School Column Title: Daily Page Options: How school name Printable Page Generate Repott	Class Lists		
Daily Period: All Semester: All Instructor: Type here to search for an instructor. Classes: 321-Excloseen thierature 321-European Literature Select All Select All Select All Voltation: Select All Student Number Instructor Image: Student Number Image: Contacts Blank Column Column Title: Options: Show school name Printable Page			Academic Year: 2010-11
Semester: All Instructor: Type here to search for an instructor. Instructor: 123-1-Algebra 1, Section 1 127-1L-Biology Lab 1, Section 1 127-1L-Biology Lab 1 201-1-Chemistry 1, Section 1 1201-1-Chemistry 1, Section 1 321-European Literature 210-F-Geography, Fall, Section 1 215-Health, Section 1 121-1-Geometry 1, Section 1 215-Health, Section 1 v Image: Show Columns: Image: Home School Image: Generate Report Image: Home School Image: Show Columns: Image: Home School Image: Show Columns: Image: Home School Image: Show Column Student Number Image: Show School name Image: Show Column Student	Daily Period:	All	
Instructor: Type here to search for an instructor. Instructor: 123-1-Algebra 1, Section 1 127-1L-Biology Lab 1 Section 1 127-1L-Biology Lab 1 Section 1 127-1L-Biology Lab 1 Section 1 201-1-Chemistry 1, Section 1 201-1-Chemistry 1, Section 1 214-English, Sem 1, Section 1 Select All Select All Select All Image: Select All 201-F-Geography, Fall, Section 1 Select All Image: Select All 201-F-Geography, Fall, Section 1 Select All Image: Select All 201-F-Geography, Fall, Section 1 Select All Image: Section 1 Section 1 Image: Section 1 Section 1 Image: Section 1 Image: Section 1	Semester:	All	
I23-1-Algebra 1, Section 1 127-1L-Biology Lab 1, Section 1 127-1L-Biology Lab 1 201-1-Chemistry 1, Section 1 214-1-English, Sem 1, Section 1 321-European Literature 210-F-Geography,Fall, Section 1 215-Health, Section 1 100-Keyboarding, Section 1 100-Keyboarding, Section 1 Show Columns: Image: Phone	Instructor:	Type here to search for an instructor.	
Image: Home School Image: Grade Level Image: Show Columns: Image: Show Columns: Image: Show Columns: Image: Show Columns: Image: Show Column Column Image: Column Title: Image: Column Title: Image: Options: Image: Options: Image: Generate Report Back	Classes:	123-1-Algebra 1, Section 1 127-1L-Biology Lab 1, Section 1 127-1L-Biology Lab 1 201-1-Chemistry 1, Section 1 124-1-English, Sem 1, Section 1 321-European Literature 210-F-Geography,Fall, Section 1 211-1-Geometry 1, Section 1 215-Health, Section 1 100-Keyboarding, Section 1	Select All
Options: Image: Hide inactive students Options: Image: Show school name Image: Printable Page Generate Report Back	Show Columns:	 Home School Grade Level Student Number Phone Mailing Address Contacts Blank Column Column Title: 	
Generate Report Back	Options:	 Hide inactive students Show school name Printable Page 	
	Generate Report	Back	

Main > Reports > Class Lists

To generate class lists for multiple classes, hold down the left mouse button as you scroll or use Ctrl, left click to select non-consecutive classes.

Class: 2	/Contact List 2010-11 215-Health, Se	ection 1, C	hase [Q1,Q2,Q4	k: 3 M-F]
Grade Level	Student	Student Number	Phone	Contacts
11	Arnought, Adam	0004		
11	Baker, Bob B.	1074	555-555-6666	Betty Baker (h) 555-555-6666 Robert Baker (h) 555-555-6666 (c) 555-123-6487 Maude Baker (h) 555-555-1234 Pappy Baker (h) 555-555-6666
11	Jones, Hector	1040	555-555-4821	Maria Jones (h) 555-555-4821
11	Long, Michael	1042	555-555-9021	Amanda Harvey (h) 555-555-9021
11	Moore, Melissa	1043	556-987-2356	
11	Sanders, Susan	1048		
11	Smith, Amanda	1665	555-555-9876	Robert Smith (h) 555-555-9876 (c) 555-908-3598
11	Wade, Robert R	1065	555-555-4562	Mary Wade (h) 555-555-4562
11	Woodman, Tammara	1069		
	Count: 9			
				•

Below is an example of a single class/contact list.

21.8 Entry Codes

Generate a report based on student entry codes. Find transfers, re-entries, etc. Subtotal by subgroup to view entries by demographic.

	Entry Code Summary								
	Academic Year: 2009-10								
	Grade Level: All								
	Subtotal By: Subgroup								
	Options:								
	Generate Report Back								
•									

Main > Reports > Entry Codes

Generate a report for the chosen academic year.

Grade Level: Narrow students by grade level or include all.

Subtotal By: Choose to include a subtotal by grade level or subgroup, as needed.

Options: Exclude inactive students and/or generate a printable report.

Entry Cod	Entry Code Summary								
Academic Year: 2009-10									
Subgroup	<u>No Entry</u> Code	Normal Entry	InterDistrict Transfer	Re-Entry	<u>Transfer In</u>				
All	<u>6</u>	<u>26</u>	1	2	2				
Asian		<u>4</u>		<u>1</u>					
Black		<u>4</u>							
Female	2	<u>13</u>		2	2				
Hispanic		<u>2</u>	1	<u>1</u>	<u>1</u>				
Low Income	<u>1</u>	1							
Male	<u>4</u>	<u>13</u>	1						
Multiracial	<u>1</u>	1							
<u>White</u> <u>5</u> <u>14</u>									
Back									

<u>Grade</u> Level	<u>Name</u> △	<u>Student</u> <u>Number</u>	Homeroom	Entry Code	Entry Date	Inactive?
10	Moore, Emma			Transfer In	10/7/2009	
10	Sanders, Susan	1048		Transfer In	9/1/2009	
Count	2					

Click the number links to view student details:

21.9 Promotion/Graduation

Generate a report based on student exit codes. Find promotions, graduations, etc. Subtotal by subgroup to view entries by demographic.

Promotion Academic Ye	n/Graduation Summary
Grade Level:	All
Subtotal By:	Grade Level 💌
Options:	 Exclude data for inactive students? Printable?
Generate R	eport Back

Main > Reports > Entry Codes

Generate a report for the chosen academic year.

Grade Level: Narrow students by grade level or include all.

Subtotal By: Choose to include a subtotal by grade level or subgroup, as needed.

Options: Exclude inactive students and/or generate a printable report.

	Promotion/Graduation Summary					
Academic Year: 2009-10						
	<u>No Exit</u> <u>Code</u>	Promoted	Moved	Erroneus Enrollment		
	<u>4</u>	<u>26</u>	<u>1</u>	<u>1</u>	┝─┚	
	Back				<u> </u>	
4				•		

Grade Level	<u>Name</u> △	<u>Student</u> Number	Homeroom	Exit Code	Exit Date	Inactive?
10	Austin, Jane	1072	J Birdman	Promoted		
7	Austin, Tom	1070		Promoted		
10	Baker, Bob B.	1074		Promoted		
7	Creston, Daniel C. "Danny"	1076		Promoted		
7	Jacobs, Harry	1038		Promoted		
10	Jones, Hector	1040		Promoted		
7	Jones, Jacquelyn May "Jackie"	1080		Promoted		
4						

Click the number links to view student details:

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21.10 Transportation Report

Generate a report of student transportation data. Narrow details by grade level, timeframe and transportation code, as needed.

	Transportation	Report	•		
Academic Year: 2009-10					
	Grade Level:	7 - Seventh Grade 9 - Ninth Grade 10 - Tenth Grade 12 - Twelfth Grade			
	Time Frame:	 Year Grading Period 1 Month November 2009 Week Monday 8/31/2009 Date Range Start: 9/1/2009 End: 6/7/2010 			
	Transportation Code:	All			
	Group By:	Student			
	Options:	 Normal Page Printable Page 			
4	Generate Back		•		

Main > Reports > Transportation Report

Choose an academic year for the generated report.

Grade Level: Choose grade level(s) to include on the report.

Time Frame: Select the timeframe for the report.

Transportation Code: Choose which codes to include on the report. **Note:** Student data corresponds to transportation codes entered in the "Yearly Enrollment Info" section on "Student" pages. Transportation Codes are defined at <u>Main > Options > Transportation Codes</u>.

Group By: Choose to view codes by student or transportation code.

Below is an example of a report generated by student:

Transportation Report					
09 0, 12					
Transportation Code	Number of Days				
Takes bus, lives > 1.5mi away	180				
Takes bus, lives > 1.5mi away	180				
Walks to school	180				
Walks to school	180				
Takes bus, lives < 1.5 mi away	180				
Takes bus, lives < 1.5 mi away	180				
Takes bus, lives > 1.5mi away	180				
Walks to school	360				
Takes bus, lives < 1.5 mi away	360				
Takes bus, lives > 1.5mi away	540				
Total	1260				
	09 0, 12 Transportation Code Takes bus, lives > 1.5mi away Takes bus, lives > 1.5mi away Walks to school Walks to school Takes bus, lives < 1.5 mi away Takes bus, lives > 1.5mi away Walks to school Takes bus, lives > 1.5mi away Takes bus, lives > 1.5mi away				

21.11 Birthday Lists

204

Generate a report of student birthdays.

Main > Reports > Birthday Lists

	Student E	Birthdays			
	School: Linco	In School			
	Academic Year: 2009-10				
	Time Frame:	 O Year O Month November ▼ O Week November ▼ 4 ▼ O Day November ▼ 4 ▼ 			
	Who:	All Students Grade Level 7 - Seventh Grade Class 2009-10 6th Grade English, Section 3			
	Sort By:	 Birth Date Last Name Grade Level, Last Name Grade Level, Birth Date 			
	Options:	 Hide Inactive Students Printable Show Header 			
F	Generate Re	eport Back			

Select an academic year and timeframe for student birthday lists.

Narrow student choices by grade level or class, as needed.

Select sorting and options for the generated report.

Below is an example of a birthday report for all tenth graders for the entire school year, showing a header:

School: Lincol Academic Yea Grade Level: T Time Frame: Y	irthday n School ar: 2009 Tenth Gra Year	/S ade	
Month	Day	Student	
March	1	Baker, Bob	10
	13	Smith, Amanda	10
April	15	Austin, Jane	10
Мау	20	Jones, Hector	10
		Wade, Robert	10
September	2	Sanders, Susan	10
December	10	Long, Michael	10
Back	1		

Note: Student birthdays in the same month will show unique days and not repeat the month. Students with the same birth date with appear sequentially and the date is not repeated, when "Sort By" is "Birth Date".

21.12 ID Cards

206

Generate student and/or employee id cards that can be printed and distributed. Id cards can be printed with barcodes for use when purchasing meals. Pictures and other information can be included on the card.

Note: To use unique student/employee numbers when generating barcodes, set the option at Main > Lunch > Options.

Note: Barcodes are generated in the "Code 128" format.

Main > Reports > ID Cards

ID Cards	
	Academic Year: 2009-10
	C Type here to search for a student [?]
Users to Print:	 Students in Grade Level: To - Tenth Grade Twelfth Grade Select All
	O Students in Homeroom: Birdman, Jay
	O Employee: All
	School Name
Fields to Show:	Grade Level
(with barcode)	Homeroom Instructor
	Student Picture
	✓ Include food item on barcode?
Food Items:	Cold Lunch w/Milk Hot Lunch w/Milk
Sort:	Last Name
Format Output For:	CR80 Card
Generate Back	
•	

Choose an academic year to print id cards.

Users to Print: Generate cards for all or select students or employees. Select from all active students and employees in your school's system.

Note: For schools that don't use the "Lunch" module but have generated unique id numbers, an option to choose which number to use on the id card will be available. Choose to use the generated unique number, or the internal id.

Fields to Show: Choose additional fields to print on id cards. Include pictures on cards, as needed.

Food Items: Choose to include the food item with the student/employee ID number on the barcode to make scanning items quicker at time of purchase. **Note:** Food items must be defined for the chosen academic year prior to generating cards with barcodes. Define food items at <u>Main > Lunch > Food Items</u>.

Format Output For: Select the option for printing that best meets your needs when generating id cards. **Note:** You must have a compatible printer to use the "CR80 Card" option. This option generates one id card per "page". Select other label options, if needed. Then once generated, cut to size for students/employees, apply to plastic cards for more durability.

Below is an example of an id card that includes school name, grade level, food item barcode and student picture:



21.13 Student Alerts

Generate a report of alerts for students. View contact, medical, and/or general alerts.

Student Alerts	
	Academic Year: 2010-11
	O Grade Level
	O Homeroom
Students:	O Group
	All Students
	Contact Alerts
Alerts to Show:	Medical Alerts
	Ceneral Alerts
Sort By:	Last Name
	✓ Hide students with no alerts
Ontions:	Show homeroom instructor
options.	☑ Show school name
	Printable Page
Occurrente Descarta Desch	
Generate Report Back	

Main > Reports > Student Alerts

Students: Narrow report by grade level, homeroom, group, or view all students.

Alerts to Show: Select the alerts to include on the report. Note: Medical alerts are available for schools using "Health Records".

Sort By: Select the sort order for the report.

Options: Choose additional options for the generated report.

Below is an example of a report viewing all alert types:

	Student Aler	ts					
	School: Lincoln School Academic Year: 2010-11 Grade Level: 8, 11 Hide students with no alerts: Yes						
	Student	Grade Level	Prevent All Contact With	Medical Alerts	Allergies	General Alerts	
	Austin, Jane	11	Steve Mason	Highly allergic to bee stings. Epi-pen in nurses office.	Wasp or Bee Stings - Epi-pen available		
	Baker, Bob B.	11		Allergy to Peanuts	Peanuts		
	Austin, Tom	8	Steve Mason				
	Creston, Daniel C.	8			Peanuts Tree Nuts		
	Count: 4						-
4						•	

21.14 Progress Report

Generate progress reports for a specified grading period. Select options to customize reports to meet your needs. Generate reports for one or many students. Also generate mailing labels and envelopes.

Progress Report		
Grading Period: 2010 Q4	4 Academic Year: 2010-11	•
Report Title:	Lincoln School Progress Report	
Message:	These are 4th quarter grades only. Final end of year grades will be forthcoming.	
Student(s):	 Grade Level 8 - Eighth Grade Homeroom Group Austin, Tom J Creston, Daniel C. Jacobs, Harry Jones, Jacquelyn May Jones, Joe Jones, Maureen Lynne Preston, Fredrick Show inactive students 	
Show only students with grades at or below:		
Where Shown?	 Printable Page Mailing Labels Envelopes 	-
•		•

Main > Reports > Progress Report

Grading Period: Select the grading period to be shown for the chosen academic year.

Report Title: The title of the progress report.

Message: Add a customized message to the top or bottom of the generated progress report.

Students: Generate a report by grade level, homeroom or group. Select one, many or all students in the chosen category.

Show only students with grades at or below: Generate progress reports only for those students at or below a chosen grade.

Where Shown?: Generate a printable report, mailing labels or envelopes. Several more customizable options are available for printable reports as outlined below.

	Show Summary:	Yes	
	Show Progress		-
	Report Comments:	No - Do NOT show progress report comments	
	Show Missing Work:	Yes	
		Yes	
	Show Assignment Details:	Only Show Assignments Since: March 🔽 1 🔽 2012 📰	
		Sort Details By Category	
	Show Attendance:	Yes	
	Show Grading	Yes - Show Grading Scales Next to Assignment Details	
	Scale:	Show Grading Scale Notes	
	Show Behavior	Yes - Show any logs for student 💌	
	Logs:	Only Show Logs Since: March 💌 1 💌 2012 💌	
		Sort Students By Last Name	
		✓ Show category subtotals	
		☑ Show percentage	
		✓ Show letter grade	
		Round class averages	
	Options:	Show date for each assignment	
		Don't show classes hidden from parents	
		Start each section on a new page	
		Show Parent Signature line	
		□ Show assignment notes	
		✓ Use Report Card class sort order	
	Save Current Settings		
	Generate Report Back		•
•		•	

Show Summary: Show a class summary on the progress report.

Show Progress Report Comments: Determine if/where to include instructor's progress report

comments on the generated report.

Show Missing Work: Include details about missing work on the progress report.

Show Assignment Details: Include details about assignments for each class.

Show Attendance: Include attendance details on the report. You can show daily or period attendance.

Show Grading Scale: Show the grading scale used for the grading period.

Show Behavior Logs: Include details from behavior logs.

Options: The final set of display options control the generic display of information. Save current settings for next time generating reports.

Below is a generated progress report showing a summary, assignments and comments:

ident: Moo	re, Melissa		C	Grade: 10		Date: 12/21/2009
mmary						
Term	Class	Instructor	Current Se	core		
009-10 Q1	Geometry	Birdman J	88.8%=B			
009-10 Q1	Biology	Birdman J	92.86%=#	4		
:009-10 Q1	English	Bradley B	92.86%=4	4		
:009-10 Q1	Social Studies	Winkler E				
Date Due	Assignmen	t Possible Points	Score	%	Letter Grade	Assignment Comments (optional)
/21/2009	Chapter Oui	- 25			-	
7 Z I / Z U U 9	Li oli abrei i Adi	2 ZJ	22	88%	B	
.0/27/2009	Chapter Tes	2 23 t 100	89	88%	В	
.0/27/2009	Chapter Qui Chapter Tes Total	t 100 125	89 111	88% 89% 88.8%	B B B	
etails for 2 Date Due	Chapter Tes Chapter Tes Total 2009-10 Q1 B Assignment	t Possible Points	22 89 111	88% 89% 88.8%	B B B Letter Grade	Assignment Comments (optional)
0/27/2009 etails for 2 Date Due /11/2009	Chapter Tes Chapter Tes Total 2009-10 Q1 B Assignmen Quiz 1	t 100 125 iology t Possible Points 20	22 89 111 Score 17	88% 89% 88.8%	B B B Letter Grade B	Assignment Comments (optional)
0/27/2009 etails for 2 Date Due /11/2009 /24/2009	Chapter Tes Chapter Tes Total 2009-10 Q1 B Assignment Quiz 1 Assignment 2	t 100 125 iology t 20 2 50	22 89 111 * Score 17 46	88% 89% 88.8% 88.8% 85% 92%	B B B Letter Grade B A	Assignment Comments (optional)
0/27/2009 etails for 2 Date Due /11/2009 /24/2009 0/26/2009	Chapter Tes Chapter Tes Total 2009-10 Q1 B Assignment Quiz 1 Assignment 2 extra credit	t 100 125 iology t 20 2 50 0	22 89 111 * Score 17 46 2	88% 89% 88.8% 88.8% 9% 85% 92%	B B B B A A A	Assignment Comments (optional)

Due	Assignment	Points	Score	9%	Grade	Assignment Comments (optional)
9/15/2009	Quiz 1	20	17	85%	В	
10/21/2009	First Paper	50	48	96%	A	Pleasure to have in class
	Total	70	65	92.86 %	Α	

21.15 Gradebook - Eligibility

Generate a report to indicate eligibility for extra-curricular activities based on a specified grade or GPA threshold.

Check Gradeb	ook Eligibility
	Academic Year: 2010-11
	Single grading period Q1 Calculate Using GPA
Timeframe:	C Running total for multiple grading periods End: Q1 Use Weights
	C Date Range Start: End: End:
Who to Show:	Grade Level All Homeroom Group All Students
Threshold:	
Sort By:	Grade Level
Options:	 Hide inactive students Show school name Show classes Show grades Show GPA
r	

Main > Reports > Gradebook - Eligibility

Select an academic year and timeframe for the report.

Timeframe: Run the report for a single grading period, multiple grading periods or a chosen date range.

- For a single grading period, choose to calculate eligibility using GPA. To use GPA instead of a grade, check the GPA option box and then set the GPA threshold. **Note:** If your school uses the Grade Reporting module, you can set an option to calculate unweighted GPA, if needed.

- Choose to use weights when viewing multiple grading periods, as needed. **Note:** Timeframes for multiple grading periods or date ranges are only available if **all** grading periods have start and end dates.

- Use a specified date range to calculate eligibility.

Who to Show: Narrow report by grade level, homeroom, group or include all students. Choices appear once selection is made.

Threshold: Choose a grade or GPA threshold value.

Sort By: Sort the generated report by student name choices or grade level.

Options: Exclude "Inactive" students, and show the school name on the generated report, as needed. Choose to show classes and corresponding grades on the generated report. Choose to show current GPA on the generated report when calculating using GPA.

	O Normal Web Page	
	O Printable Page	
	O Mailing Labels	
	O Envelopes	
	O Printable Letter	
Where Shown?	⊙ Email	
	Template: Failing Grade	
	Contacts	
	✓ Student	
	Preview Only (Does not send email)	
	🗹 Log Email	
·		
Generate Report Bac	ĸ	•

Generate email or printable letters using letter templates, as needed. Additional options appear once selection is made.

Below is an example of a report with a grade threshold of "D", showing classes and grades:

Chec	heck Gradebook Eligibility							
Grading Period: 2008-09 Q1 Grade Level: All								
Grade Level	Student	Class	Instructor	Current Score				
6	Smith, Sam	6th Grade Math	Beth Whitman	56.43=F				
6	Smith, Susan	6th Grade Math	Beth Whitman	67.14=D				
6	Spector, Sally	6th Grade Math	Beth Whitman	59.29=F				
9	Wade, Robert R	Biology	Jay Birdman	61.33=D				
Total=4								
Back								
				Þ				

Below is an example using a GPA threshold of "2":

Check Grading Grade L	k Gradeboo Period: 2009-1 evel: All	k Eligibility 0 Q1	
Grade Level	Student	Current GPA	
10	Jones, Hector	2	
10	Long, Michael	2	
Total=2			
Back	-1		-

For either report type, click a student's name to view their details on "Parent Main".

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21.16 Gradebook - Failing Subgroups

Find the percentage of students with grades at or below the threshold. Identify students who are struggling, so they can get help before they fail standardized tests. **Note:** This report is only available if your school has purchased Core Student Management.

	Predict Failing Subgro	ups	
	Academic Year: 2008-09 💌		
	Grading Period:	2008-09 Q1 💌	
	Grade Level:	9 - Ninth Grade	
	Subgroup:	All	
	Subject:	Mathematics	
	Failure Prediction Threshold:	D	
	Options:	Printable?	
	Generate Report Back		•
4		F	

Main > Reports > Gradebook - Failing Subgroups

View struggling students:

	Identify Failing Students								
Grading Period: 2008-09 Q1 Grade Level: 9 - Ninth Grade Subgroup: All Subject Area: Science									
	Instructor	Class	Student	Ethnicity	Disabled?	Low Income?	Limited English Proficiency?	Current Score	
	Birdman J	Biology	Rodrigues, Robert	Hispanic			true	68.67=D	
	Birdman J	Biology	Wade, Robert R					61.33=D	
	Students at or below D	2 (28.6%)							
	Total Students	7 (100%)							
	Back								-
4									
21.17 Gradebook - Grades

View gradebook grades for a chosen student. Generate a printable page, if needed.

Main > Reports > Gradebook - Grades

Gradebook Grades Student: Cruz, Maria (15795) - 9	Search: C		(ex:7 js	nith)[?] Academic Year	2011-12	1
Class	,	Q1		Q2	Q3	Q4
Algebra 1, Section 1	95	i% = A		97% = A		
English, Sem 1, Section 1	10	0% = A		98% = A		
Phys Ed 1, Section 1	88	% = B		87% = B		
Social Studies,Fall, Section 1	91	% = A		89% = B		

Select an academic year and student to view their current gradebook grades.

Click a grade link to view assignment details for the chosen grade.

Note: Grades shown are from the student's total grade currently in the teacher's gradebook.

21.18 State Standards Coverage

Determine how well state or district defined standards are being covered by courses at your school. Identify gaps and overlaps in coverage of standards by your curriculum.

State S	tandards Coverage
Academi	: Year: 2008-09 💌
Report T	Courses: O Show coverage by course standards O Show coverage by course curriculum maps ype Classes:
	 Show coverage by class standards Show coverage by class curriculum maps Show coverage by class lesson plans
Standard	Language Arts, Late Elementary, Learning Standards
Thresho	Id: • View all standards • View standards covered by less than 1 • class(es)
Options:	 Show description for standard items Show curriculum map details Show class description Show printer-friendly page
Generat	e Report Back

Main > Reports > State Standards Coverage

Report Type: Choose which type of report to generate:

Courses:

- Determine the number of course standards that cover a chosen state standard.

- Determine the number of course curriculum maps that cover a chosen state defined standard.

Classes:

- Determine the number of class standards that cover a chosen state standard.
- Determine the number of class curriculum maps that cover a chosen state standard.
- Determine the number of class lesson plans that cover a chosen state standard.

Standard: Choose a standard for which to assess coverage. Standards shown are state and district defined standards only.

Threshold: Choose to view all standards or select a threshold. To view only those standards without coverage, select a threshold coverage of less than 1.

Options: Select items to show on report.

Below is an example of a printer friendly report for standard coverage by course curriculum maps, viewing all standards, and showing descriptions for standards, courses and curriculum maps. Overall 36 of the 57 standard items for this state standard are covered by at least 1 curriculum map.

State Standards Coverage by Course Curriculum Map					
State Overa	Standard : Language Arts, Middle/Junior High Sch II 36 out of 57 standard items covered.	nool (Grade 6	i-8), Learning Standards		
Number	Standard	Coverage	Course Description	n - Cu m iculum Map	
1	Read with understanding and fluency.	0			
1.A	Apply word analysis and vocabulary skills to comprehend selections.	0			
1.A.3a	Apply knowledge of word origins and derivations to comprehend words used in specific content areas (e.g., scientific,	3	Sixth Grade Language Arts/English Sixth Grade Language Arts/English	6 - Writng, Grammar, and Usage II 6 - Writng, Grammar, and Usage III	
	political, literary, mathematical).		Sixth Grade Language Arts/English	6 - Writng, Grammar, and Usage IV	
1.А.ЗЬ	Analyze the meaning of words and	2	Sixth Grade Language Arts/English	6 - Writng, Grammar, and Usage III	
	phoses in their concext		Sixth Grade Language Arts/English	6 - Writng, Grammar, and Usage IV	
1.B	Apply reading strategies to improve understanding and fluency.	0			
1.B.3a	Preview reading materials, make predictions and relate reading to information from other sources.	5	Sixth Grade Language Arts/English Sixth Grade Language Arts/English	6 - Writng, Grammar, and Usage II 6 - Poetry	
			Sixth Grade Language Arts/English	6 - Fiction and Drama	

Below is an example of a printer friendly report for standard coverage by course standards, viewing all standards, and showing descriptions for standards and courses. Overall 57 of the 57 standard items for this state standard are covered by standards for at least 1 course.

State Standards Coverage by Course Standards

State Standard: Language Arts, Middle/Junior High School (Grade 6-8), Learning Standards

Number	Standard	Coverage	Course Description
1	Read with understanding and fluency.	1	124 - English
1.A	Apply word analysis and vocabulary skills to comprehend selections.	1	124 - English
1.A.3a	Apply knowledge of word origins and derivations to comprehend words used in specific content areas (e.g., scientific, political, literary, mathematical).	1	124 - English
1.A.3b	Analyze the meaning of words and phrases in their context.	1	124 - English
1.B	Apply reading strategies to improve understanding and fluency.	1	124 - English
1.B.3a	Preview reading materials, make predictions and relate reading to information from other sources.	1	124 - English
1.B.3b	Identify text structure and create a visual representation (e.g., graphic organizer, outline, drawing) to use while reading.	1	124 - English
1.B.3c	Continuously check and clarify for understanding (e.g., in addition to previous skills, draw comparisons to other readings).	1	124 - English
1.B.3d	Read age-appropriate material with fluency and accuracy.	1	124 - English

21.19 Employee Details

Generate customized reports for employees at your school. Many filtering options are provided to meet your needs. Easily generate mailing labels and data files.

	Employee D	etails]		
	Sho	w Which Employees			
	C Single Emp	loyee: Admin, Adam			
	 All employees in school 				
		Filter Employees			
	SchoolInsight User Role	School District Admin School Admin Other Instructors			
	Active	Any 💌			
	Hire Date				
	Tenured	Any 💌			
	Birthdate	Any 🗸 🔽 🔽			
	Gender	Any			
	Ethnicity	Any			
	Position Type	Any			
	Highest Degree	Any			
	Sort Emplo	yees By			
	Last Name		•		
•		Þ			

Main > Reports > Employee Details

Generate a report for one or many employees at your school.

Filter Employees: Generate report for employees matching chosen filters.

Sort Employees By: Choose the sort order for report data.



Fields to Show: Select the fields that you want to be shown on the report using the "Add/Remove" buttons. These will be your column headings. Use the "Move Up/Down" buttons to sort the order that the columns will appear on the report.

Where Shown?: Choose the type of report to generate. Additional available options are shown once a selection is made.

Below is an example of a report showing employee names, school and user role:

	Employee Detail	s	
	Full Name	School Name	SchoolInsight User Role
	Admin, Adam	Lincoln School	School Admin
	admin, test	Lincoln School	School Admin
	Birdman, Jay	Lincoln School	Instructor
	Bradley, Brenda	Lincoln School	Instructor
	Chase, Brian	Lincoln School	Instructor
	Counselor, Guidance	Lincoln School	Instructor
	Johnson, Joe	Lincoln School	Other
	Jones, Karen	Lincoln School	Instructor
	Nurse, Nancy	Lincoln School	School Admin
	Principal, Betty	Lincoln School	School Admin
	Rutherford, Ann	Lincoln School	Instructor
	Smith, Matt	Lincoln School	Instructor
	test, test	Lincoln School	Instructor
	Whitman, Beth	Lincoln School	Instructor
	Winkler, Eric	Lincoln School	Instructor
	Count=15		
	Back		
•) b

21.20 Teacher/Class Quality

Generate a report that shows the number of "highly qualified" teachers in your school. **Note:** This field is set when creating new or editing existing <u>instructors</u>.

```
Main > Reports > Teacher Quality
```

T	eacher Quality	
S	itatus	Count
н	lighly Qualified Teachers	1
N	IOT Highly Qualified Teachers	1
U	Inclassified Teachers	8

Generate a report that shows the number of classes taught by "highly qualified" teachers. **Note:** Classes must have "Subject Area" defined to be included.

Main > Reports > Class Quality

Class Quality	
Academic Year: 2008-09	
Status	Count
Classes Taught by Highly Qualified Teachers	14
Classes Taught by NOT Highly Qualified Teachers	0
Classes Taught by Unclassified Teachers	24
Classes Not in Selected Subject Areas	37

Reports	225

22 Email / Announcements

SchoolInsight makes it easy to share information with parents, students or staff. It also logs all email sent to students for easy review.



Email/Announcements			
Setup	Daily Work	Reports	
Email Addresses	Email Parents/Students	Email Log Report	
Email Address Search	Email Staff		
Email Signature	Announcements		
			_
Back to Main			-
		► I	

Note: Email Addresses can also be accessed at Main > Email Addresses.

22.1 Email Address Search

Search for an existing student or parent email address. Once found, edit/delete/merge the email address or resend a welcome message.

Main > Email/Announcements > Email Address Search

	Email Address Search	•
	Email: bjb@ip.com	
	Search Back	
◀		

Email: Enter an email address for the search. **Note:** Wildcards (%) are allowed for entries of 7 characters or more.

Search

Search all of SchoolInsight for an existing email address. **Note:** Admins can only manage email addresses that belong to their school.

Below is an example of a search result:

	Email Addres	ss Search	ı				
	Email Address: taustin@au.com						
	Accounts in your	district					
	Email	Name	Role	Student(s)	School(s)		
	taustin@au.com	Tony Austin	Parent	Contact for: Ally Austin Jane Austin Tammi Austin Tom Austin	Gradeschool Lincoln School	edit delete resend	
	Count	1					
	Search Again Back						
4							Þ

The following links perform the same functions as on the "Email Addresses" page.

<u>Edit</u>

Modify the chosen student/contact email address and/or password. Send a welcome email to the contact with their login and password information. Merge two email accounts together. For more details on merging account email addresses see the "Merge Accounts" section.

Delete

Remove an email address from the chosen student/contact.

Resend

Automatically resend a welcome email with login and password information to the chosen email account. This is helpful for students/parents who've misplaced their password.

22.2 Email Signature

Create a "signature" to attach to the bottom of emails you send from SchoolInsight. This is a convenient reminder to parents about how to contact you. To modify your signature, highlight the text to change, type in the new information and "Save".

Main > Email Signature



22.3 Email Parents/Students

Communicate with parents and/or students via email.

Note: To include attachment references for an email, upload the attachment to your digital locker. Once uploaded, parents/students have immediate access to the file(s). For more details on using digital lockers goto <u>Main > Digital Lockers</u>.

Main > Email/Announcements > Email Parents/Students

Compose Email
Student: Austin, Jane (1072) - 11 Search: Jane Austin (ex: 7 j smith) [?] Academic Year: 2010-11
□ Show students without email addresses?
TO:
"Melissa Austin" <maustingau.com></maustingau.com>
✓ "Tony Austin" <taustin@au.com></taustin@au.com>
SUBJECT
We Beth Bradley
Teacher
Lincoln School
phone: 555-5555
email: bradley@teacherease.com
You can find more information online at: http://www.teacherease.com
If you yould nother WAT receive this evail in the future
update your account:
http://www.teacherease.com/common/UpdatePassword.aspx
✓ Save a copy of this email to Email Logs
Send Back

Student: Search for a student by initial, name or and/or grade level. Use the [clear] link to do another search. (See <u>Student Search</u> for more details.)

Select which persons will receive the email. Enter subject and email text. Choose to log a copy of the sent email.

Note: If your email address resulted in <u>delivery failures</u> you must update your account before sending email. Student/Contact email addresses resulting in <u>delivery failures</u> are blocked and must be corrected.

22.4 Email Staff

You can quickly send email to any/all instructors/administrators:

Main > Email/Announcemen	ts > Email Staff
--------------------------	------------------



Note: If your email address resulted in <u>delivery failures</u> you must update your account before sending email. Staff email addresses resulting in <u>delivery failures</u> are blocked, will not appear in the list and must be corrected in order to send/receive emails.

22.5 Announcements

Announcements allow admins to communicate with large groups of parents/students. Announce upcoming events, recruit volunteers, etc. Send email announcements to students and their contacts for the entire school or a chosen grade level or group.

Announce	ments				
Mode: All	-	1		Academic Year: 2012-13	•
All		L		1	
Dat Grade	Level	it By	Sent To	Subject	
8/16/2010	Bradle	ey	Group: Speech Team	Speech team schedule of events	delete
3/5/2010	Bradle	ву	7 - Seventh Grade	7th Grade Field Trip	delete
3/5/2010	Bradl	ву	Entire School	School Survey	delete
11/3/2009	Bradle	ву	Entire School	School Announcement	delete
Send Annour	ncement	Back			•
			-		

Main > Email/Announcements > Announcements

Review sent announcements that were saved in SchoolInsight. Click the "Subject" link to view the announcement details. Delete announcements that are no longer needed.

Send Announcement

Create an announcement to send to contacts and/or students. Send a copy to chosen staff.

Send Announceme	ent	L		
		Academic Year: 2012		
Recipients:	Contacts 🗹 Students			
Send for Students In:	 Grade Level Group All Students 			
CC Staff:	 School Admins Instructors 			
Subject:				
Subject: 				
	-			
Send Back		▼ ▼		

Main > Email/Announcements > Announcements > Send Announcement

Recipients: Send the announcement to contacts, students or both.

Send for Students In: Select to send the announcement by grade level, group, or to all students. To send announcements to groups, first create groups at <u>Main > Groups</u>. **Note:** To select non-sequential grade levels/groups, click items while holding the ctrl key on your keyboard.

CC Staff: Send a copy of the announcement to your school admins and/or instructors.

Enter a subject line and then type in the announcement in the provided text box.

Post a copy of this announcement: Save a record of your announcement in Schoollnsight.

Note: If your email address resulted in <u>delivery failures</u> you must update your account before sending email. Staff/Student/Contact email addresses resulting in <u>delivery failures</u> are blocked, will not receive announcements and must be corrected. View failing email addresses on the <u>Email</u> <u>Addresses</u> page.

22.6 Email Log Report

Utilize the email log report to see a record of sent announcements and/or email messages. View emails/announcements sent to a student, or view all emails/announcements sent to or by an employee.

Email Log F	Report		
		Academic Year: 2012-13	•
Who To Show:	 Single Student Type here to search for a student C Employee 		
What to Show:	 Emails Announcements 		
Options:	Printable Page		
Generate Rep	ort Back		•

Main > Email/Announcements > Email Log Report

Academic Year: Select an academic year to view email/announcements.

Who to Show: View emails/announcements either sent to a student or view those sent to or by an employee.

What to Show: Choose to view emails, announcements, or both. Note: Announcements are included that were sent at the corresponding level or where they are being viewed. For example, a district announcement would not be included in the list generated at the school level.

Below is an example of emails and announcements a	sent to a student:
---	--------------------

	туре	From	Subject	10	
7/10/2013	Email	J. Birdman	Test Reminder	T. Austin M. Austin T. Austin J. Birdman	delete
7/8/2013	Announcement	B. Bradley	Fist Day of Student Attendance	Contacts and Student Entire School CC: School Admins, Instructors [show]	

Date	Туре	From	Subject	То	
7/10/2013	Email	J. Birdman	Test Reminder	J. Jones J. Jones	delet
7/10/2013	Email	J. Birdman	Test Reminder	T. Austin M. Austin T. Austin J. Birdman	delet
7/8/2013	Announcement	B. Bradley	Fist Day of Student Attendance	Contacts and Student Entire School CC: School Admins, Instructors [show]	

Below is an example of emails sent by and announcements sent to an employee:

Use the link in the "Subject" column to view the corresponding email/announcement contents.

<u>Send Email</u> Compose an email and send it to student/parents. Choose to log the email, as needed. See <u>Main ></u> Email/Announcements > Email Parents/Students for more details.

Delete

Remove the chosen email from the logs.

23 Letter Templates

Use letter templates to communicate easily with students, parents and/or employees. Create a library of letters for repeated use throughout the year. Customize letter templates for specific communication to many persons. Letters can then be mailed and/or emailed when generating corresponding reports.

Main > Letter Templates

	Letter Templates							
	School: Lincoln School							
	Template Type	Description	Active?					
	General	<u>Finals</u>	Yes	edit delete				
	Grades	Failing Grade	Yes	edit delete				
Create Letter Template Back								
4				▶	-			

Depending on what portion of SchoolInsight your school has purchased, some letter templates will be initially provided for you. If no templates exist, you can create your own to communicate information using the "General" and "Grades" template types. "General" types will appear for use on the "Custom Student Report" at <u>Main > Reports > Custom Report</u>. "Grades" types will appear for use on the "Check Grade book Eligibility" report at <u>Main > Reports > Gradebook - Eligibility</u>.

Create Letter Template

Create a new letter template to mail and/or email. Click the template "Description" to view the letter template.

<u>Edit</u>

Modify the letter template details or change active state.

Delete

Remove the template. **Note:** Once deleted, the template cannot be recovered. You may want to make it inactive instead.

23.1 Create Letter Template

Create a new letter template to be mailed and/or emailed to students, parents and/or employees when generating reports.

	Create Letter Te	mplate	
	*Template Type:	General]
	*Description:		
	*Top Body		
	Report Details	Details determined by type of report letter was generated from.	
	*Bottom Body		
	Letter Signature		
	*Subject: (email only)		
	*Number Templates Printable per Page:	1	
	Active:	Yes	
	* Required fields. Save Back		
C			

Main > Letter Templates > Create Letter Template

Template Type: Choose the type of letter template to create.

Note: You may only have the option to use "General" and "Grades" depending on what modules your school has purchased.

"General" templates will appear for use on the "Custom Student Report" at <u>Main > Reports > Custom</u> <u>Report</u>.

"Grades" templates will appear for use on the "Check Grade book Eligibility" report at <u>Main > Reports</u> <u>> Gradebook - Eligibility</u>.

Note: for the following purchased modules:

- Lunch letter templates can also be accessed at <u>Main > Lunch > Letter Templates</u> and are used with the "<u>Account Balances</u>" report.

- Discipline templates can also be accessed at <u>Main > Discipline > Letter Templates</u> and are used to notify persons concerning a discipline incident at <u>Main > Discipline > Discipline Incidents > Notify</u>.

- Attendance templates can also be accessed at <u>Main > Attendance > Letter Templates</u> and are used with the "<u>Truancy</u>" and "<u>Perfect Attendance</u>" reports.

- Grades templates for report cards are accessed by <u>Main > Report Card - Honor Roll</u> and <u>Report Card - Low Grades</u> reports.

Description: Provide a descriptive title for your letter template. This will appear on the reports as an available template in the dropdown box.

Top Body: Enter introductory text for the top body of the letter/email.

Report Details: Differs based on the report. Contain details as to the purpose of the letter/email. For example, for "Gradebook-Eligibility" it would contain details about low/failing grades.

Bottom Body: Enter closing text for the bottom body of the letter/email.

Letter Signature: Enter a closing salutation and signature for the letter/email.

Subject: Create a subject title to be used when generating emails.

Number of Templates Printable per Page: Determine the number of letters to print on a single page when printing letters.

Active: Template is active or not. Default is "Yes".

24 Groups

Create groups to manage special student teams at your school for clubs, sports, etc. Assign instructors to manage groups. <u>Send announcements</u> and run reports by group. **Note:** Set permissions to allow teachers to create/manage groups at Main > Options > Permissions.

Main > Groups

Groups		
Show All G	roups (including	groups with instructors)
Group	Instructor	
Math Club	Birdman, Jay	members edit delete
Science Club	Rutherford, Ann	members edit delete
Speech Team		members edit delete
Yearbook Staff	Chase, Brian Jones, Karen	members edit delete
Create Group	Back	

Show all groups: View/manage groups for your school, including those with instructors assigned.

Create groups for a chosen academic year. Assign students and/or instructors to groups.

Create Group

Create a new group for the chosen academic year. Assign instructor(s) and add students, as needed. **Note:** Add instructor(s) to allow them to view/manage the group details. **Note:** Set permissions to allow teachers to create/manage groups at <u>Main > Options > Permissions</u>.

<u>Members</u>

View/manage students for a chosen group.

<u>Edit</u>

Modify details (description, instructor) for a chosen group. Mark a group active/inactive.

Delete

Remove a group that doesn't have students assigned. You may want to mark it "inactive" instead.

24.1 Create Group

Create a new group for your school. Choose to assign instructor(s) to the group.

Main > Groups > Create Group

	Create Group	
	Academic Year 2009-10	
	Description:	
	Instructor:	
		_
	Save & Add Students Save Only Back	•
◀		

Description: Name of the new group.

Instructor: Assign one or more instructor to manage the group. Use the + to enter multiple instructors. Once assigned, instructors can view/manage the group from Instructor Main. They can perform the same functions as an admin; add/delete student members, assign additional teachers, edit group details, etc. **Note:** Set permissions to allow teachers to create/manage groups at <u>Main > Options > Permissions</u>. If permissions don't allow teachers to modify groups they will only be able to view groups and their members.

Save & Add Students

Save the new group and add student members. Narrow student choices by grade level, as needed.

24.2 Members

Manage student members for a chosen group. Add, delete, mass delete students.

Main > Groups	>	Members
---------------	---	---------

	Group Members								
	Group: Math Club [Birdman, Jay] Academic Year: 2009-10								
	Student	Grade Level			Instructor(s)				
	Austin, Jane	10	delete		Birdman, Jay				
	Baker, Bob B.	10	delete						
	Jones, Hector	10	delete						
	Moore, Emma	10	delete						
	Smith, Amanda	10	delete						
	Count: 5								
	Add Students	to Group Ma	ass Del	ete	Back	•			
•					·				

Add Students to Group

Add one or more students to the group.

Delete

Remove a chosen student from the group.

Mass Delete

Remove multiple students from a group. **Note:** All students must be deleted from a group prior to deleting the group.

24.3 Add Students to Group

Add students to new or existing groups. Narrow student list by grade level, as needed. **Note:** Students can be on multiple groups.

For new groups:

Main > Groups >	 Create 	Group >	Save &	Add Students
-----------------	----------------------------	---------	--------	--------------

	Add	Students to Grou	р					•
	Group	: Speech Team		_			Aca	ademic Year: 2009-10
	Grade	Level: 7 - Seventh Gr	ade	•				_
	Save	Back						
		Student	Γ	Student		Student	Student	
		Austin, Tom	Γ	Jones, Joe		Smith, Sam	Tank, Tim	
	•	Creston, Daniel C.	Г	Jones, Maureen Lynne	•	Smith, Susan	Time, Justin	
		Jacobs, Harry	Ŀ	Preston, Fredrick		Spector, Sally		
	V	Jones, Jacquelyn May	Γ	Reddy, Ian	V	Suchmore, Mary		•
◀								

For existing groups:

Add Students to Group Group: Math Club [Birdman, Jay] Academic Year: 2009-10 Grade Level: All • Student Student Student Student Already Sanders, Susan - \square \Box Tank, Tim - 7 Jones, Joe - 7 Austin, Jane - 10 \square in Group 10 Jones, Maureen Lynne \Box Time, Justin - 7 \Box Austin, Tom - 7 Smith, Adam - 12 - 7 \Box Wade, Robert R - 10 \Box \checkmark Baker, Bob B. - 10 Long, Michael - 10 Smith, Adam - 12 $\mathbf{\nabla}$ Winkler, Wendy - 11 Smith, Amanda - \Box Already \Box Creston, Daniel C. - 7 Manning, Fred - 10 in Group 10 Woodman, Tammara - \Box \Box Cruise, Mandy - 11 Martin, Emily - 10 \Box Smith, Sam - 7 10 Already ~ Fisher, Karen - 11 Moore, Emma - 10 Smith, Susan - 7 in Group Jacobs, Harry - 7 \Box \Box Spector, Sally - 7 Moore, Melissa - 10 Already Jones, Hector - 10 \Box Preston, Fredrick - 7 student, new - 9 in Group Jones, Jacquelyn May Suchmore, Mary -Reddy, Ian - 7 - 7 7 Save Back

Main > Groups > Members > Add Students to Group

25 Digital Lockers

School Admins and instructors can upload their own documents to an area of SchoolInsight called "Digital Lockers". Once uploaded, files are shared electronically with parent/students who have access to SchoolInsight from the parent portal. Use digital lockers for important parent/student communication, such as, newsletters, forms, policy changes, etc. Instructors can also upload assignment attachments for parents/students use. **Note:** Admins must be given permissions to view/ modify digital lockers. This is done when creating/editing admins at <u>Main > Admins</u>.

Each document file is virus scanned during the upload. Space usage is tracked and visible for each user.

Digital Lo	ckers			
			Academic Year: 2009-1	10 🗖
Date	Description	Attachment	File Size	
10/30/2009	October School Newsletter	October Newsletter.pdf	0.19 MB	edit delete
9/14/2009	Test Dates	School Testing Dates.doc	0.02 MB	edit delete
9/4/2009	State Report Card	School State Report Card.pdf	0.19 MB	edit delete
Total Digital	Locker		0.4 MB	
Total Other Y	<u>/ears</u>	0.02 MB		
Total Space	Used	0.42 MB		
Total Space	Available	50 MB		
Total Space Free 49.58 MB (99.1				
Add File N	/lass Delete Files Back			

Main > Digital Lockers

Each admin manages their own digital locker space and content, adding and removing documents as needed.

Add File

Add a file to your digital locker. **Note:** All digital locker content is viewable from Parent Main. **Note:** Once added, click an attachment name to open/save the file.

Mass Delete Files

Remove one/many files from a chosen academic year. Quickly delete all files from a previous school year. Use caution as this cannot be undone. **Note:** Files used for "Online Registration" cannot be deleted.

<u>Edit</u>

Modify the date, description and/or file name for a chosen file. **Note:** These changes affect the digital locker file only, not the original uploaded file.

Delete

Remove a chosen file from your digital locker. Once removed the file cannot be recovered by SchoolInsight. **Note:** Files used for "Online Registration" cannot be deleted.

Total Other Years

View digital locker space used per academic year. Choose to delete one/many files from a chosen year. The delete functions the same as "Mass Delete Files", above.

25.1 Add File

Add a file to your digital locker. All digital locker content is viewable from Parent Main. Once added, your digital locker space will reflect the file size and remaining available space.

Digital	Locker - Add Files]
Academi	c Year: 2009-10 💌	
Date:	Friday 1/8/2010	
Descript	ion:	
File:	Browse	
Save	Back	-
•		

Main > Digital Lockers > Add File

Choose an academic year for the document file.

Date: Select a date for the added file. Default is today's date.

Description: Enter a description of the document, as needed.

File: Enter a file name or browse to find the file to add.

26 Bus Routes

Manage school bus routes for your school. Create routes and corresponding stops for a chosen academic year. Assign students and generate reports to view student's bus route and stop information.

Note: During the fall of 2010 a redesign took place to allow students to be assigned to multiple bus routes. Students can now be assigned separate morning and afternoon routes. If your school used "Bus Routes" prior to the redesign, student's existing bus stops have been assigned to the "Morning" bus stop and their "Afternoon" bus stop will be blank. You will want to edit/mass edit students to assign an afternoon stop. For more details on assigning students to bus stops see <u>Main > Bus</u> <u>Routes > Bus Stops > Assign Students to Stops</u>.

You may also want to edit existing bus stops to add a drop off time. See <u>Main > Bus Routes > Bus</u> <u>Stops</u> for more details.

Note: Your school must have purchased Core Student Management in order to use Bus Routes.

View existing or create new bus routes for a chosen academic year.

	Bus Rout	es		_
	Academic Ye	ar: 2008-	09 💌	
	🗹 Hide Inac	tive Bus Ro	putes	
	Description	Capacity		
	East Route	44	stops edit delete merge	
	North Route	44	stops edit delete merge	
	South Route	44	stops edit delete merge	
	West Route	44	stops edit delete merge	
	Count=4	Active=4		
	Create Bus	Route R	un Bus Report Printable Page Copy Bus Routes	Back 🚽
4				•

Main > Bus Routes

Initially, no bus routes will exist and you will be prompted to create one.

Create Bus Route

Create a new bus route for the chosen academic year.

<u>Stops</u>

View existing or create new bus stops for the chosen route.

<u>Edit</u>

Modify a chosen bus route name, capacity or mark active/inactive.

Delete

Remove the chosen bus route. **Note:** Routes with assigned stops cannot be deleted. Remove stops first.

<u>Merge</u>

Combine bus routes to remove duplicates. Existing bus stops for chosen routes will be combined. **Note:** Use with caution. Once bus routes are merged, they cannot be separated.

Run Bus Report

Generate a report of student bus route assignments.

Printable Page

Generate a printable view of the bus routes page.

Copy Bus Routes

Copy bus routes from one academic year to another.

26.1 Create Bus Route

Create a bus route for the chosen academic year.

Main > Bus Routes > Create Bus Route

Create Bus Route	•
Academic Year: 2008-09	
Description:	
Capacity:	
Active: Yes	
Save & Create Stops Save Only Back	• 1

Description: Enter a bus route description.

Capacity: Enter the route capacity, as needed. This would typically be the maximum number of students able to occupy the bus.

Active: Mark the route active/inactive.

Save & Create Stops

Save the bus route and create stops for the route.

26.2 Bus Stops

View existing or create new bus stops for the chosen bus route. **Note:** Once created, assign existing students to bus stops at <u>Main > Students - Multi View > Mass Edit</u>. Assign a single student at Main > Students - Multi View > Edit or Main Students - Single View > Edit Student.

Main > Bus Routes > Stops

Bus Route: East Route Academic Year: 2009-1 Image: Hide Inactive Bus Stops Description Pickup Time Dropoff Time Notes Bus Route 225 Angling Road 7:00am 3:30pm edit delete merge East Route 112 Royce Road 7:05am 3:35pm edit delete merge East Route 14 Elm Street 7:10am 3:40pm edit delete merge	Bus Stops					
Image: Wide Inactive Bus Stops Pickup Time Dropoff Time Notes Bus Route 225 Angling Road 7:00am 3:30pm edit delete merge East Route 112 Royce Road 7:05am 3:35pm edit delete merge East Route 14 Elm Street 7:10am 3:40pm edit delete merge	Bus Route: Eas	st Route 💌				Academic Year: 2009-10
Bus RouteDescriptionPickup TimeDropoff TimeNotesEast Route225 Angling Road7:00am3:30pmedit delete mergeEast Route112 Royce Road7:05am3:35pmedit delete mergeEast Route14 Elm Street7:10am3:40pmedit delete merge	Hide Inactive	Bus Stops				
East Route 225 Angling Road 7:00am 3:30pm edit delete merge East Route 112 Royce Road 7:05am 3:35pm edit delete merge East Route 14 Elm Street 7:10am 3:40pm edit delete merge	Bus Route	Description	Pickup Time	Dropoff Time	Notes	
East Route 112 Royce Road 7:05am 3:35pm edit delete merge East Route 14 Elm Street 7:10am 3:40pm edit delete merge	East Route	225 Angling Road	7:00am	3:30pm		edit delete merge
East Route 14 Elm Street 7:10am 3:40pm edit delete merge	East Route	112 Royce Road	7:05am	3:35pm		edit delete merge
	East Route	14 Elm Street	7:10am	3:40pm		edit delete merge
Count=3 Active=3			Count=3	Active=3		
	Create Bus Sto	p Printable Page Bac	k			
Create Bus Stop Printable Page Back	1					•

Initially, no bus stops will exist and you will be prompted to create one.

Create Bus Stop

Create a new bus stop for the chosen bus route.

Printable Page

Generate a printable view of the bus stops page.

<u>Edit</u>

Modify a chosen bus stop name, pickup/drop off time(s), notes or mark active/inactive. **Note:** For bus stops that existed prior to the fall 2010 redesign, only a pickup time will be recorded. You may want to edit the stops to add drop off times for completeness.

Delete

Remove the chosen bus stop.

<u>Merge</u>

Combine bus stops to remove duplicates. Existing student stop assignments for the chosen stops will be combined. **Note:** Use with caution. Once bus stops are merged, they cannot be separated.

26.2.1 Create Bus Stop

Create a bus stop for the chosen bus route.

Main > Bus Routes > Stops > Create Bus Stop

Create Bus Stop
Bus Route: East Route
Description:
Pickup Time:
Dropoff Time:
Notes:
Active: Yes
Save Back

Description: Enter a bus stop description. Generally, this would be the address where the bus will stop and pick up students.

Note: Either the pickup or drop off time can be left blank. This means that the bus does not make a stop for whichever timeframe is left blank.

Pickup Time: Enter the time when the bus will stop to pickup students in the morning.

Drop off Time: Enter the time when the bus will stop to drop off students in the afternoon.

Notes: Enter any additional information needed for this stop.

Active: Mark the stop active/inactive.

26.2.2 Assign Students to Stops

Once bus stops are created for the bus routes, students can be added to stops. Students can be added to the same or different stops for the morning and afternoon, as needed.

Note: During the fall of 2010 a redesign took place to allow students to be assigned to multiple bus routes. Students can now be assigned separate morning and afternoon routes. If your school used "Bus Routes" prior to the redesign, student's existing bus stops have been assigned to the "Morning" bus stop and their "Afternoon" bus stop will be blank. You will want to edit/mass edit students to assign an afternoon stop.

Note: If a student only rides the bus one way, set the appropriate stop for **either** "Morning" or "Afternoon". Leave the other timeframe blank to indicate that they do not ride the bus in that timeframe.

To add a single student to a stop, or to set their "Afternoon" bus stop, goto Main > Students - Single View > Edit Student and scroll down to the "Yearly Enrollment Info" section. Choose the appropriate stop from the dropdown box. Of course, bus stop information can also be entered when creating new students.

You can set the afternoon stop to be the "same as morning" or you can select a different stop, when needed.

	Yearly Enrollment Info			
Academic Year:	2009-10			
*Grade Level:	10 - Tenth Grade			
Homeroom Instructor:	Brian Chase			
Advisor:	Karen Jones			
Team:	10th Grade Team 💌			
Transportation Code:	Transportation Code Takes bus, lives > 1.5mi away 💌	Effective Date +		
Bus Stop:	Bus Stop: Afternoon: South Route - 456 Pine (7:40am)			
Graduation Date:				

Main > Students - Single View > Edit Student

Mass edit students to assign the same bus stop(s) to many students.

If a student was assigned a bus route, prior to the redesign, their afternoon stop will be blank. You'll want to mass edit students to set their afternoon bus stops. This is done at $\frac{\text{Main} > \text{Students} - \text{Multi}}{\text{View} > \text{Mass Edit}}$.

You can quickly set stops to be the same for the both morning and afternoon. Choose "same as morning" from the "Afternoon" dropdown box, select appropriate students and "Save".

Main > Students - Multi View > Mass Edit

Bue Stop:	Morning:	•
Bus Stop.	Afternoon: same as morning	•

26.3 Bus Report

Generate a report of student bus route and stop information.

Main > Bus Routes > Run Bus Report

Bus	Report Options
Acade	emic Year: 2008-09 💌
Bus F	Route: O Specific Bus Route: East Route
Show	C Assigned Students Only C Unassigned Students Only C All Students
Sortin	ng: Pickup Time
Option	ns: Hide inactive students (or not enrolled)
Gene	erate Report Back

First, select an academic year for a generated bus report.

Bus Route:

- All Bus Routes: View details of student bus route/stop assignments. Note: To view all students or unassigned students, use this option.

- **Specific Bus Route:** View students assigned to a chosen bus route, along with stop and pickup times.

Show: Choose to view students assigned to a bus route, students with no bus route assignment or both. **Note:** To view all students or unassigned students, specify the "All Bus Routes" option, above.

Sorting: Choose report sort options.

Options: Decide to hide inactive students and/or create a printable version of the report.

Below is an example of a bus report for all routes and all students, sorted by last name:

Bus Report					
Bus Route: East Ro	oute				
Studen	Bu	s Stop	Pickup Ti	me Notes	
Austin, Tom		14 Elm S	Street	7:10am	
Creston, Daniel C.	"Danny"	14 Elm S	Street	7:10am	
Jacobs, Harry		125 Angl	ing Road	7:00am	
Jones, Jacquelyn I	125 Angl	ing Road	7:00am		
Jones, Joe	125 Angl	ing Road	7:00am		
Jones, Maureen Ly	112 Roy	ce Road	7:05am		
Preston, Fredrick "	Chip"	112 Roy	ce Road	7:05am	
Reddy, Ian		112 Roy	ce Road	7:05am	
Smith, Sam		112 Roy	ce Road	7:05am	
Smith, Susan		112 Roy	ce Road	7:05am	
Student Count=10)	Number	of Stops=3	Route Cap	pacity=44
Bus Route: North R	loute				_
Student	Bus S	stop	Pickup Tin	ne Notes	
Hernandez, Sofia	19 West Wa	ay	7:30am		1
Jones, Hector	19 West Wa	ay	7:30am		-
Long, Michael	19 West Wa	ау	7:30am		
Rodrigues, Robert	19 West Wa	ay	7:30am		
Winkler, Thomas	ad	7:15am			
Student Count=5	Number of	Stops=2	Route Capa	acity=44	
Bus Route: South F	Route				
Student	Bus St	top	Pickup Tim	e Notes	
Spector Sally	123 Forest		7:35am		
opooloi, oailj	1231 01630				
Suchmore, Mary	123 Forest		7:35am		

26.4 Copy Bus Routes

Copy existing bus routes from one academic year to another. **Note:** All existing bus routes and corresponding stops will be copied.

Сору	Bus Rout	es		
Copy bu	is route inform	ation to an	other acade	mic
Current	Academic Ye	ar: 2008-0	9 💌	
	Bus Route	e Copy Opti	ons	
New Ac	ademic Year:		2009-10	•
Сору Ви	us Information	to Students	s 🔽	
Note: Bu You may	is Route Inform want to prom Bus Route	mation will note studer es to Copy	only be cop its prior to	bied f copy
Note: Bu You may Copy?	s Route Inform want to pron Bus Route	mation will note studer es to Copy	only be cop nts prior to	oied f copy
Note: Bu You may Copy?	s Route Inform want to pron Bus Route Description	mation will note studer es to Copy Capacity	only be cop nts prior to Inactive?	bied f
Note: Bu You may Copy?	Bus Route Inform Want to pron Bus Route Description East Route	mation will note studer es to Copy Capacity 44	only be cop its prior to Inactive?	bied f
Note: Bu You may Copy?	Bus Route Bus Route Description East Route North Route	Capacity 44	only be cop nts prior to Inactive?	oied f copy
Note: Bu You may Copy?	Bus Route Bus Route Description East Route North Route South Route	es to Copy Capacity 44	only be cop nts prior to Inactive?	oied f
Note: Bu You may Copy?	Bus Route Bus Route Description East Route North Route South Route West Route	Capacity 44 44	only be cop its prior to Inactive?	oied f
Note: Bu You may Copy?	Bus Route Bus Route Description East Route North Route South Route West Route	es to Copy Capacity 44 44 44	only be cop nts prior to	bied f

Main > Bus Routes > Copy Bus Routes

Current Academic Year: Copy bus route information from the selected academic year.

New Academic Year: Copy bus route information to the selected academic year.

Copy Bus Information to Students: Check to copy all student bus stop assignments from one academic year to another. **Note:** Promote students to the new academic year first. Students must exist in both years to be copied.

Copy?: Select which route(s) information to copy.
Tutoring/Activity Logs 27

School Admins can track student's extracurricular activity hours by date. Define categories to track different kinds of activities, such as tutoring, service, etc. Log details for one or many students. Generate reports to view student activity details. Note: Your school must have purchased Core Student Management in order to use Tutoring/Activity Logs.

Note: Set Admin permissions to view/modify Tutoring/Activity Logs at Main > Admins > Create/Edit.

٠ Tutoring/Activity Log Main Setup Daily Entry Reports Log Details Categories Logs Log Summary Back to Main

Categories

Define categories for tracking tutoring/activity hours.

Main > Tutoring/Activity Logs

Logs

Enter hours for student's activities by date and category.

Log Details

Generate a report of tutoring/activity log details for one or many students.

Log Summary

Generate a summary report of hours logged for one or many students.

27.1 Categories

Define tutoring/activity categories to track student hours by date.

Main > Tutoring/Activity Logs > Categories

	Tutoring	g/Activ	ity Catego	ories 🔺
	Category	Active		
	Service	Yes	edit delete	1
	Tutoring	Yes	edit delete	
	Create Ca	tegory	Back	-
•				Þ

Initially, the 'Tutoring' category will be provided for you.

Create Category

Create additional categories to meet your school's needs. Enter a descriptive category name.

<u>Edit</u>

Modify the category name. Mark the category active/inactive.

Delete

Remove an unused category. **Note:** Once used in a log, a category cannot be deleted.

27.2 Logs

Record/view student extracurricular hours for a chosen academic year. Filter logs by student, date, or employee and category. **Note:** Individual student logs can also be viewed/managed from the "Tutoring/Activity Logs" tab on the "<u>Students - Single View</u>" page.

Main > Tutoring/Activity Logs > Logs

	Tutoring	g/Activity	/ Logs						
	Academic	Year: 200	9-10 💌					Mode: Student	•
	Student:	Austin, Jan	e - 10	▼ Se	arch: a			Category: All	•
	Date	Category	Hours	Employee	Date Modified	Comments			
	1/29/2010	Service	4	Karen Jones	2/2/2010	Community Service	edit delete		
	2/2/2010	Tutoring	1		2/2/2010	Peer Tutoring	edit delete		
	Count: 2		Total: 5						
	Create Lo	g Mass C	Create Lo	gs Printable	e Page 🛛 Back				-
◄						-			

View tutoring/activity logs for a chosen academic year. Select "Mode" to view logs by student, date, or employee. Narrow to view by single category or view all.

Create Log

Enter a new student activity log. The page will be pre-populated with corresponding student/date/ employee information based on the chosen 'Mode'.

Mass Create Logs

Log an activity for many students at the same time. Select an academic year and grade level. Enter activity details. Select students for the created log.

Printable Page

View a printable version of the activity log page.

<u>Edit</u>

Modify details for a chosen log.

Delete

Remove a student activity log. Note: Use caution when deleting as this cannot be undone.

27.2.1 Create Log

Create a new log of extracurricular hours for a student.

	Create Lo	>g ▲
	*Student:	Austin, Jane - 10
	*Date:	2/2/2010
	*Category:	
	*Hours:	
	Employee:	
	Comments:	
	* - Required F	Fields
	Save Save	e & Create Another Back
4		

Enter log details for a chosen academic year.

Student: Use [clear] to search for a different student. Use the 📕 to add more students, if needed.

Date: Enter date that activity hours were performed.

Category: Choose category for the log hours.

Hours: Enter the number of hours that apply to this activity log.

Employee: Choose to enter an employee's name, if needed. Use this field to record who supervised the student's hours, or who is creating the log.

Comments: Enter additional comments for the log.

27.3 Log Details

Generate a report of tutoring/activity log details for one or many students. Narrow by timeframe/ category/employee, to meet your reporting needs.

	Tutoring/A	Activity Log Details	
	Academic Ye	ar: 2009-10 💌	
	Time Frame:	 Year Grading Period 1 Month February 2010 Date Range Start: 2/2/2010 End: 2/2/2010 	
	Students:	 Single Student Type here to search for a student Grade Level All All Students 	-
	Category:	All	
	Employee:	All	
	Options:	 Hide Inactive Students Hide Inactive Categories Printable Page 	
•	Generate Re	eport Back	•

Main > Tutoring/Activity Logs > Log Details

Choose an academic year for the generated report.

Time Frame: Choose to generate a report for a year, grading period, month or selected date range.

Students: Select student(s) for the generated report.

Category: View total hours by a single category or view all.

Employee: Narrow report to view summary for a chosen employee, or view all.

Options: Select options for the generated report.

Below is an example of a detailed report for the year for all students, categories and employees:

Date	Student	Category	Hours	Employee	Date Modified	Comments
/22/2010	Austin, Jane	Service	8	Brian Chase	2/2/2010	Community service project for World Studies class
/22/2010	Baker, Bob B.	Service	8	Brian Chase	2/2/2010	Community service project for World Studies class
/22/2010	Jones, Hector	Service	8	Brian Chase	2/2/2010	Community service project for World Studies class
/22/2010	Long, Michael	Service	8	Brian Chase	2/2/2010	Community service project for World Studies class
/22/2010	Moore, Melissa	Service	8	Brian Chase	2/2/2010	Community service project for World Studies class
/22/2010	Smith, Amanda	Service	8	Brian Chase	2/2/2010	Community service project for World Studies class
/22/2010	Wade, Robert R	Service	8	Brian Chase	2/2/2010	Community service project for World Studies class
/29/2010	Austin, Jane	Service	4	Karen Jones	2/2/2010	In school service
/2/2010	Austin, Jane	Tutoring	1		2/2/2010	Peer Tutoring
/3/2010	Austin, Jane	Tutoring	1.5		2/2/2010	Peer Tutoring
Count: 10		Total: 62.5				

27.4 Log Summary

Generate a summary report of hours logged for one or many students. Narrow by timeframe/ category/employee, to meet your reporting needs.

	Tutoring//	Activity Log Summary				
	Academic Year: 2009-10 -					
	Time Frame:	 Year Grading Period Q1 Month February 2010 Date Range Start: 2/2/2010 End: 2/2/2010 				
	Students:	 Single Student Type here to search for a student Grade Level All All Students 				
	Category:	All				
	Employee:	All				
	Options:	 Hide Inactive Students Hide Inactive Categories Show Zeros As Blank Printable Page 				
4	Generate Re	eport Back				

Main > Tutoring/Activity Logs > Log Summary

Choose an academic year for the generated report.

Time Frame: Choose to generate a report for a year, grading period, month or selected date range.

Students: Select student(s) for the generated report.

Category: View total hours by a single category or view all.

Employee: Narrow report to view summary for a chosen employee, or view all.

Options: Select options for the generated report.

Below is an example of a summary report for the year for all students, categories and employees:

	Tutoring/Activity Log Summary 🔺							
	Academic Year:	2009-10						
	Student	Service	Tutoring	Total				
	Austin, Jane	12	<u>6.5</u>	18.5	1			
	Baker, Bob B.	<u>8</u>	<u>4</u>	12	1			
	Jones, Hector	<u>8</u>	<u>4</u>	12	1			
	Long, Michael	<u>8</u>	<u>4</u>	<u>12</u>	1			
	Moore, Melissa	<u>8</u>	<u>4</u>	<u>12</u>	1			
	Sanders, Susan		<u>4</u>	<u>4</u>	1			
	Smith, Amanda	<u>8</u>	<u>4</u>	<u>12</u>	1			
	Wade, Robert R	<u>8</u>	<u>4</u>	<u>12</u>	1			
	Total:	<u>60</u>	34.5	<u>94.5</u>	-			
	Back				•			
•				۱.	ſ			

Click a link to view details for the logged hours.

28 Lockers

Enable locker management at your school for a chosen academic year. Create and manage lockers by locker group. Automatically generate locker assignments. Define multiple locker combinations then advance to new combinations when needed.

Note: Your school must have purchased Core Student Management in order to use Lockers.

	Lockers		
	Setup	Ongoing Work	Reports
	Options .	Locker Assignments	Locker Details
	Locker Groups	Update Combinations	
	Lockers		
	Import Lockers		
	Copy Lockers		_
	Back to Main		-
•			•

Main > Lockers

28.1 Options

Enable use of locker management and configure locker assignments. **Note:** Options can also be set from at <u>Main > Options > Lockers</u>.

Note: Your school must have purchased Core Student Management in order to use Lockers.

	Locker Options	
	Academic Year: 2009-10	
	Locker Options	
	🗹 Enable Locker Management	
	□ Allow multiple students in the same locker	
	Max Combinations per Locker 4	
	Auto-assign Lockers by	
	O Homeroom	
	Grade Level O Toom	
	C Team	
	Save Back	•
•		

Main > Lockers > Options > Edit

Setup locker options for a chosen academic year.

Choose to allow students to share a locker.

Set the maximum number of combinations for each locker. **Note:** This number is used when assigning combinations at $\underline{Main > Lockers > Mass Edit Combinations}$. It is also used when importing lockers at $\underline{Main > Lockers > Import Lockers}$.

Determine whether to have lockers automatically assigned by homeroom, grade level, or teams. **Note:** You must use teams for scheduling in order to assign lockers by team. More details can be found at Main > Scheduling.

28.2 Locker Groups

Create locker groups, then automatically assign students to a series of lockers in the group.

Main > Lockers > Locker Groups

	Locker Groups							
	Academic Year: 2009-10							
	Description	Grade Level	Notes					
	7-A Lockers	7	7A Lockers	lockers edit delete				
	7-B Lockers	7	7B Lockers	lockers edit delete	\vdash			
	Create Locker Group Back							
•				•				

Lockers

View/manage a chosen locker group. <u>Create a new locker</u>, add it to a group and assign combinations. Add/remove lockers from a chosen group. **Note:** The locker is added to/removed from the chosen group. The locker, existing assignment and combination(s) are **not** changed.

<u>Edit</u>

Modify the locker group description, grade level and/or notes.

Delete

Delete a locker group. **Note:** This removes the lockers from the group. It does not delete the lockers or any existing assignments or combinations.

Create Locker Group

Create a new locker group based on your chosen option of grade level, homeroom or team. Choose to also create a series of lockers for the group. Assign a group prefix and specify a first/last number range, to meet your school's needs.

	Create Locker Group	_
	Academic Year: 2009-10	
	*Description:	
	*Grade Level:	
	Notes:	×
	* Required fields	
	Also create a series of lockers for this group	
	Prefix of Locker Numbers:	
	First Number in Series:	
	Last Number in Series:	
	Save Back	-
•		

28.3 Lockers

Manage lockers and combinations. Mass create new lockers and assign to locker groups. Assign locker combinations.

	Lockers									
	Locker Group	p: All	•				Acade	mic Year: 200	9-10	•
	Mass Creat	e Lockers C	reate Locker	Mass Edit Loc	kers Mass E	dit Combir	nations B	ack		
	Locker Number △	Current Combination	Combination 1	Combination 2	Combination 3	Locker Group	Notes	<u>Needs</u> Maintenance	Active	
	100	11-1-11	11-1-11				non- grouped		Yes	edit delete
	7A25	23-6-49	23-6-49	18-9-16	42-9-87	7-A Lockers	Broken lock	Yes	No	edit delete
	7A26	61-9-10	12-5-64	61-9-10	31-4-12	7-A Lockers			Yes	edit delete
	7A27	29-9-84	8-15-51	29-9-84	65-8-76	7-A Lockers			Yes	edit delete
	7A28					7-A Lockers			Yes	edit delete
	7A29					7-A Lockers			Yes	<u>edit</u> delete ▼
4										

Main > Lockers > Lockers

View/manage lockers for a chosen academic year. Narrow by locker group, as needed.

Mass Create Lockers

Create many lockers and assign them to a locker group.

Create Locker

Create a single locker, assign it to a group and enter locker combinations.

Mass Edit Lockers

Update lockers for a chosen academic year. Update for one locker group or for all. Set lockers to active/inactive, mark "needs maintenance" and/or move lockers to another locker group.

Mass Edit Combinations

Assign combinations to lockers. Assign multiple combinations to be used in subsequent years, or as needed. **Note:** The number of combinations available is set at <u>Main > Lockers > Options</u>.

Edit

Modify locker details. Mark if a locker needs maintenance and/or mark it active/inactive.

Delete

Remove a locker. **Note:** You cannot delete lockers that are assigned to students.

266	Admin	Basic	Setu	p
266	Admin	Basic	Setu	

28.3.1 Mass Create Lockers

Mass create a series of lockers and assign them to locker groups.

Main > Lockers > Lockers > Mass Create Lockers

Mass Create Locke	rs	
Academic Year: 2007-08		_
Prefix of Locker Numbers:	6	
*First Number in Series:	1	
*Last Number in Series:	40 Example: Prefix=A, First Number=1, Last Number=100 Will create a series of lockers A001, A002, A003,, A100	
Locker Group:	 No Group Use Existing 6th Grade Create New Description: Team: Notes: 	
Save Back		•

Create a series of lockers for a chosen academic year.

Prefix: Add a prefix for the locker series, as needed.

First/Last Number in Series: Choose the start/end numbers for the locker series.

Locker Group: Select locker grouping for series of lockers. **Note:** You must use locker groups to auto-assign lockers to students. Define locker groups at <u>Main > Lockers > Locker Groups</u>.

28.3.2 Mass Edit Combinations

Enter locker combinations. Define multiple locker combinations then advance to new combinations when needed, such as, at the start of a new academic year.

	Mass Edit Co	mbinations			<u> </u>
	Locker Group: 7	-A Lockers 💌		Academi	c Year: 2009-10 💌
	Save Back				
	Locker Number	Locker Group	Combination 1	Combination 2	Combination 3
	7A25	7-A Lockers	23-6-49	18-9-16	42-9-87
	7A26	7-A Lockers	12-5-64	61-9-10	31-4-12
	7A27	7-A Lockers	8-15-51	29-9-84	65-8-76
	7A28	7-A Lockers			
	7A29	7-A Lockers			
•					

Main > Lockers > Lockers > Mass Edit Combinations

Enter combinations for lockers in a chosen academic year. Narrow by locker group, as needed.

Combinations can be any format needed. Use the "Tab" button to quickly move to the next box.

Note: The number of combinations is based on "Max Combinations per Locker", set at <u>Main ></u> <u>Lockers > Options</u>.

28.3.3 Edit Locker

Modify details for a chosen locker. Existing locker assignments will remain for the locker.

Main > Lockers > Lockers >	Edit
----------------------------	------

	Edit Locker			•
	Academic Year: 2009-	10		
	Locker Number:	7A25		
	Locker Group:	7-A Lockers 💌		
		23-6-48	0	
	Locker Combinations:	18-9-16	 Current Combination 	
		42-9-87	O	
	Notes:			
	Needs Maintenance:	No 💌		
	Active:	Yes 💌		_
	Save Back			•
•			•	

Locker Number: Change the current locker number. **Note:** If assigned, the student's assignment will reflect the new number.

Locker Group: Move the locker to a different locker group.

Locker Combinations: Modify the locker combinations and/or switch to use a different combination.

Notes: Add notes, as needed.

Needs Maintenance: Mark a locker as needing maintenance. View all lockers needing maintenance on the <u>Locker Details</u> report.

Active: Mark locker active/inactive. Quickly find inactive lockers using the Locker Details report.

28.4 Import Lockers

Import locker numbers and combinations.

Main > Lockers > Import Lockers

Import Loc	kers
Academic Year	2009-10 💌
File Name:	Browse
Delimiter:	Comma Delimited (CSV) with no surrounding quotes
Preview Mode:	 Show errors only Show errors and duplicates Show all
Preview Bac	<u>-</u>

Select an academic year for the imported lockers.

File Name: Browse or enter the import file name. Expected format is locker number, combination 1, combination 2, combination 3, ... (# based on "Max Combinations per Locker", set at <u>Main > Lockers</u> <u>> Options</u>)

Delimiter: Choose the delimiter that matches your import file format.

Preview Mode: Review details prior to import.

- Show errors only view data that will result in an import error
- Show errors and duplicated view data that will result in errors or duplicate entries
- Show all view all data details along with errors and duplicates

Below is an example of a import preview showing all information:

Status	Locker Number	Combination 1	Combination 2	Combination 3
	Locker Number	Combination 1	Combination 2	Combination 3
	6A001	14-2-34	75-7-77	65-2-32
	6A002	34-4-56	72-5-97	65-6-12
Error: Invalid Locker Number		56-7-65	54-6-12	98-0-10
	7A021	98-9-76	45-3-34	67-2-43
	8A050	23-3-45	76-9-01	98-1-34
	8A051	45-2-65	90-2-43	12-34-1
Total Rows: 7	Rows to insert: 6 Existing Rows to Existing Rows wit	update:0 h no changes:0		Invalid Rows: 1

28.5 Copy Lockers

Copy locker options, lockers and groups from one academic year to another. Copy locker assignments for students that exist in both years.

	Copy Lockers	_					
	Current Academic Ye	ear: 2009-10 💌					
	Locker Copy Options						
	New Academic Year:	2010-11 💌					
	Options:	☑ Locker Options					
		C Lockers					
		Locker Groups					
		Student Locker Assignment					
	Copy Back	•					
•		•					

Main > Lockers > Copy Lockers

Select items to copy from one academic year to another.

Choose to copy current locker options, lockers and/or locker groups from one year to the next.

Copy student locker assignments, as needed. **Note:** Students must exist in both academic years. You may need to promote students prior to copying locker assignments. For more details see <u>Main ></u> <u>Students - Multi View > Promote Students</u>.

28.6 Locker Assignments

Automatically assign lockers to students based on locker groups.

Locker Assignment						
Grade Level: 7 - Seventh Grad	e 💌			Мо	de: Grade Le	evel -
Students to Show: Students wi	th Lockers 💌		ļ	Academic Year: 2	2009-10	•
Auto-Assign Lockers Mass	Unassign Lockers	Back				
<u>Student Name</u> △	Grade Level	Locker Number	Current Combination	Locker Group	Notes	
Austin, Tom	7	7A25	23-6-49	7-A Lockers	Broken lock	edit
Creston, Daniel C. "Danny"	7	7A31	45-9-99	7-A Lockers		edit
Jacobs, Harry	7	7B62	56-9-76	7-B Lockers		edit
Jones, Jacquelyn May "Jackie"	7	7A26	61-9-10	7-A Lockers		edit
Jones, Joe	7	7A28		7-A Lockers		edit
Jones, Maureen Lynne	7	7A35		7-A Lockers		edit
Preston, Fredrick "Chip"	7	7B63	89-0-10	7-B Lockers		edit
Reddy, Ian	7	7A32		7-A Lockers		edit
Smith, Sam	7	7A33		7-A Lockers		edit
Smith Susan	7	7A30		7-A Lockers		edit

Main > Lockers > Locker Assignments

Assign lockers automatically for the chosen academic year and mode.

Mode: Assign lockers by grade level, homeroom, locker or team. You can further narrow choices, such as for a specific grade level, once the mode is selected. **Note:** You must use teams for scheduling in order to assign lockers by team. More details can be found at Main > Scheduling.

Students to Show: Quickly find students or lockers with/without assignments. Selections change based on "Mode".

- Mode = Grade Level or Homeroom or Team, Show = All, Student with Lockers, Students without Lockers, Inactive Students

- Mode = Lockers, Show = All, Lockers with Students, Lockers without Students

Auto-Assign Lockers

Automatically assign students to lockers based on chosen options. Choose to assign students alphabetically. Choose to re-assign students with lockers.

Mass Unassign Lockers

Mass unassign lockers by grade level, homeroom, locker group, or all. Remove locker assignments for the chosen academic year.

<u>Edit</u>

Assign/unassign locker for a single student. Modify the locker combination.

28.6.1 Auto-Assign Lockers

Mass assign lockers to students based on chosen options. Note: You must use locker groups to auto-assign lockers to students. Define locker groups at Main > Lockers > Locker Groups.

Main > Lockers > Locker Assignments > Auto-Assign Lockers

	Auto-Assign Lockers	<u> </u>
		Academic Year: 2009-10
	Automatically assign students in the following grade level(s) to lockers in the appropriate group:	7 - Seventh Grade 9 - Ninth Grade 10 - Tenth Grade 11 - Eleventh Grade 12 - Twelfth Grade
	Options:	 Exclude inactive students Assign students alphabetically (uncheck for random) Reassign students already in lockers
4	Save Back	

Automatically assign students to lockers based on chosen options. **Note:** Assignments are made based on the auto-assign mode chosen at <u>Main > Lockers > Options</u>.

Choose to assign students alphabetically or randomly.

Choose to re-assign students with lockers. This is useful when students move to other grade levels, teams, etc.

28.6.2 Mass Unassign Lockers

Unassign many lockers based on a chosen mode for the academic year.

Main > I	Lockers >	Locker	Assignmen	ts
----------	-----------	--------	-----------	----

ow: Both	Active and Inactive Students		100		-
Unassign	Student Name	Locker Number	Current Combination	Locker Group	Notes
	Austin, Tom	7A25	23-6-49	7-A Lockers	Broken lock
	Creston, Daniel C. "Danny"	7A31	45-9-99	7-A Lockers	
	Jacobs, Harry	7B62	56-9-76	7-B Lockers	
	Jones, Jacquelyn May "Jackie"	7A26	61-9-10	7-A Lockers	
	Jones, Joe	7A28		7-A Lockers	
•	Jones, Maureen Lynne	7A35		7-A Lockers	
	Preston, Fredrick "Chip"	7863	89-0-10	7-B Lockers	
	Reddy, Ian	7A32		7-A Lockers	
	Smith, Sam	7A33		7-A Lockers	
•	Smith, Susan	7A30		7-A Lockers	
	Spector, Sally	7A34		7-A Lockers	
	Suchmore, Mary	7B61	34-3-56	7-B Lockers	
	Tank, Tim	7A29		7-A Lockers	
	Time, Justin	7A27	29-9-84	7-A Lockers	
	Students=14				

Mode = All: Unassign lockers for one or many students. Filter students by active/inactive, as needed.

Mode = Grade Level: Unassign lockers for all students in a chosen grade level.

Mode = Homeroom: Unassign lockers for all students in a chosen homeroom.

Mode = Team: Unassign lockers for all students in a chosen team.

Mode = Locker Group: Unassign lockers for all students in a chosen locker group. **Note:** The lockers remain in the locker group.

28.7 Update Combinations

Change the locker combination used in a series of combinations. This is especially useful for updating all combinations for a new academic year.

Main > Lockers > Update Combinations

Update Locker Combinations 🛋
Academic Year: 2009-10
Changes made to each locker
• Use next combination in sequence
C Use combination 1
Save Back

Choose to use the next in sequence or select a specific combination number in the series.

Note: Changes are applied to all lockers for the chosen academic year.

28.8 Locker Details

Generate a report of locker details to help manage lockers.

Main >	Lockers :	> Locker	Details
--------	-----------	----------	---------

	Locker Details	i	
	Academic Year: 2	009-10	
	Lockers to Show:	All	
		🔽 Locker Number	
		Student Name (if any)	
		Current Combination	
	Columns to Show:	Combination Position	
		All Combinations	
		Notes	
		🗹 Needs Maintenance	
		☑ Active/Inactive	
		Exclude Inactive Lockers	
	Options:	🗌 Show Only Lockers Needing Maintenance	
		Printable Page	
			1
	Generate Report	Back	•
4		•	

Generate a locker report for a chosen academic year.

Lockers to Show: Generate a report for all lockers, or narrow by those assigned/unassigned to students.

Columns to Show: Select items to include on the report. Quickly find lockers that are active/inactive and/or need maintenance.

Options: Include/exclude inactive lockers, show lockers needing maintenance and generate a printable page.

Below is an example of a report generated for lockers assigned to students, showing student name and needs maintenance:

	Locker Detail	s		
	Academic Year: 2 Lockers To Show Exclude Inactive I	009-10 : Assigned to Students .ockers: Yes		
	Printable Back	<		
	Locker Number	Student Name	Needs Maintenance	
	7A25	Austin, Tom	True	
	7A26	Jones, Jacquelyn May	False	
	7A27	Time, Justin	False	
	7A28	Jones, Joe	False	
	7A29	Tank, Tim	False	
	7A30	Smith, Susan	False	
	7A31	Creston, Daniel C.	False	
	7A32	Reddy, Ian	False	
	7A33	Smith, Sam	False	
	7A34	Spector, Sally	False	
	7A35	Jones, Maureen Lynne	False	
	7B61	Suchmore, Mary	False	
	7B62	Jacobs, Harry	False	
	7B63	Preston, Fredrick	False	
	Count: 14			-
•			•	

29 Online Registration

Conduct your annual student registration process using SchoolInsight. Determine which students will be returning to your school for the upcoming academic year. Have parents update their contact information from the parent portal. Attach forms/documents for parents to view/print/sign/return. Monitor registration progress online. Allow online payment of registration fees.

Note: Your school must have purchased Core Student Management in order to use Online Registration.

Note: Promote students to the chosen (upcoming) year to allow parent access to online registration. Online registration is for use by parents of current students with enrollments in both the current, active year and the next, future year.

SchoolInsight provides the flexibility of managing online registration multiple ways to suit your district/ school unique needs. Determine your configuration and complete setup prior to enabling online registration.

0	nline Registratio	on			_
			Academic Year:	2013-14	•
Se	etup	Daily Work	Reports		
Op	otions	Student Registration Status	Registration Details		
Re	egistration Process	Registration Fee Waiver/Lunch Status			
Re	egistration Fees				
В	Back to Main				-
•					

Main > Online Registration

Academic Year: Choose an academic year for online registration. This is typically the upcoming school year. **Note:** You must promote students to the chosen registration year before parents can register them online.

Options

Enable online registration, set the start/end dates and manage what parents view on the parent portal.

Registration Process

Define the process steps and forms to be used during online registration. **Note:** The registration process can be managed at either the district or school level. If managed by the district, the forms and steps will be set for the district and schools cannot make changes. However, registration options are managed for each school individually, per academic year.

Registration Fees

Define optional and mandatory fees by grade level. Assign fee amounts based on student need; allow waivers. Align fees with an account and category as defined in <u>Main > Tuition/Fees > Accounts</u>.

Student Registration Status

Monitor the progress of student registration. See which parents still need to complete their forms.

Registration Fee Waiver/Lunch Status

View, enter and approve registration fee waivers. Automatically align registration waivers with the student's lunch program. **Note:** The Online Registration District Option, "When determining registration fee waivers, use lunch program information" must be set to "Yes" to use this functionality.

Registration Details Generate a report to view status of online registration.

29.1 Registration Options

Determine and set the configuration for using online registration. Enable the use of online registration for a chosen academic year. Set the timeframe for online registration. Manage what parents see on the parent portal.

Note: The registration process can be managed at either the district or school level. If managed by the district, the forms and steps and registration fees will be set for the district and schools cannot make changes. However, school registration options are managed for each school individually, per academic year.

	Edit Online Regist	ration Options					
		Academic Ye	ar: 2013-14	-			
		District Options					
	District has one online re	gistration process and online registration form	No 💌				
	Enable Calculation of Re	gistration Fees	Yes 💌				
	Enable Online Payment of	of Registration Fees	Yes 💌				
	When determining regist	When determining registration fee waivers, use lunch program information					
	Allow deposits to student lunch accounts during registration						
	Issue registration fee wa Note: These children w	Issue registration fee waivers for children in family beyond Note: These children will receive the registration fee waiver price					
1		School Options					
	Use Online Registration	Yes					
	Registration Start Date	5/10/2013					
	Registration End Date	7/12/2013					
		O Display reminder on main page					
	Parent Login	Returning students should register for the 2013-14 by 6/1/13. br>Please click the online registration	school year 🔺 link below. 🔻				
		C Online Registration Form must be filled before access is granted					
		C None					
	Save Back			•			
•				►			

Main > Online Registration > Options

District Options: Note: District options are not tied to an academic year, they apply to all years.

Where is online registration managed?

- Manage at district level? Create one registration form/steps for all schools to use. Setup fees for all schools in a central location. Provides consistency across all schools in your district. Note: Fees can vary per school.
- Manage at school level Allow each school to create their own registration forms/steps and setup their own fees.

Will you manage registration fees online?

• Enable calculation of registration fees? Allows you to create registration fees based on existing

Accounts/Categories defined per school at "Main > Tuition/Fees". When set to "Yes" allows the remaining district options to be enabled. If set to "No", none of the remaining district options are used. **Note:** If district has one online registration process, registration fees are managed at the district level.

- Enable online payment of fees? Allow parents to pay fees using credit cards and/or E-Checks during the registration process. Reduce time and paperwork for both parents and schools. Note: An "Authorize.net" account must be setup and online payment must be enabled prior to using this option. See <u>Main > Tuition/Fees > Options > Online Payment</u> for more details.
- Use student lunch program to determine registration fee waivers? Set registration fees based on assigned student lunch programs. Also allows parents to request a fee waiver during online registration. Direct certified students are automatically waived. (See <u>Main > Lunch > Student</u> <u>Lunch Programs</u> for more details on lunch program setup.)
- Allow parents to add deposits to their student lunch accounts during registration? Save time by letting parents add money to their student's lunch accounts when paying their registration fees online.
- Provide a fee waiver for families with multiple students in the district? A fee waiver will be applied to any students **beyond** the chosen value. For example, if set to the "2nd Child", the 3rd child and beyond will have the waiver applied.

School Options: Note: School options apply to the chosen academic year.

Use Online Registration: Activate online registration for the upcoming school year. This allows parents to indicate if their student is returning to the school and to modify their contact information, when allowed. (See <u>Online Registration > Registration Process > Edit Form</u> for more details). **Note:** Promote students to the upcoming year to allow parents access to online registration.

Registration Start/End Date: Set the timeframe, start/end dates, for the online registration process.

Parent Login: Determine what parents see on the parent portal for online registration.

- Display a reminder on main page: Enter a message that will appear on Parent Main when parents login.
- Have a registration form "popup" when parents login to Parent Main, requiring them to fill out and save the form prior to going to any other part of the parent portal.
- None: No message or forms will be automatically displayed on the parent portal. The "Online Registration" link will be shown.

29.2 Registration Process

Manage the process steps and forms used for your school's online registration. Define process steps, add items to the registration form, attach other documents for parents to view/sign/return.

Note: The registration process can be managed at either the district or school level. If managed by the district, the forms and steps will be set for the district and schools cannot make changes.

Main > Online Registration > Registration Process

Onli	ne Registration Process				
			Academic	Year: 2011-12	•
Step	Description	Grade Level	Attachments	Track Completion	
1	Complete Registration Form	All		Yes	<u>view</u> form
2	Please sign and return the following document(s) to the school office.	All	Internet Access Approval.doc Picture Consent Form.doc	Yes	<u>edit</u> <u>delete</u>
3	Please review the following document(s) for the upcoming school year with your student(s).	All	Student Handbook 2011.doc	Yes	edit delete
Cr	eate Step Edit Form Copy Back				

The registration form and initial step of the online registration process is provided for you. Make modifications as needed to meet your school's registration needs.

Create Step

Add more steps to the online registration process. You can define different steps for different grade levels. Add attachments for parents to view/print/sign/return, with corresponding instructions. **Note:** If online registration is managed by your district, schools can view the registration steps but cannot make modifications.

Edit Form

Modify the registration form. Allow contact information to be updated. Add/delete registration fields, as needed. **Note:** If online registration is managed by your district, schools can view the registration form but cannot make modifications.

Copy

Copy registration steps/forms from one academic year to another.

Edit

Modify the details for a chosen online registration step. Add/delete attachments, change the grade levels, adjust sort order, etc. **Note:** If online registration is managed by your district, schools can view the attachments but cannot make modifications.

Delete

Remove a step from the online registration process. **Note:** If online registration is managed by your district, schools can view the registration steps but cannot delete steps.

For details on what parents will see/do from the parent portal please see the "<u>Parents Online</u> <u>Registration</u>" section below.

29.2.1 Create Step

Create additional online registration process steps. Attach documents for parents to review, print, sign and return to the office. Provide external URLs for parents to access during registration.

create Online	Registration Step	-
		Academic Year: 2013-14
*Description:	Please sign and return the following document (s) to the school office.	
Min Grade Level:	All	
Max Grade Level:	All	
Attachments:	Browse +	
External URL:		
Track Completion:		
Sort:	Bottom of list (after Complete Online Registration Form)	
indicates required	fields	
Save Back		

Main > Online Registration > Registration Process > Create Step

Description: Enter instructions for parents to view for this online registration step.

Min/Max Grade Level: Narrow the grade level for this step, as needed.

Attachments: Provide corresponding attachments for the online registration step, such as, a form to print, sign and return to the office. **Note:** The return of forms to the office cannot be tracked automatically online. <u>Edit the registration status</u> to manually update when the forms are returned.

External URL: Enter a URL for parents to access during the registration process. For example, this could take them to a Federal form that needs to be filled out.

Track Completion: Keep track of when the registration step has been completed.

Sort: Determine where in the process this step should be placed.

29.2.2 Edit Form

Modify the registration form that parents see on the parent portal. A default registration form is provided for you. Modify existing and/or add new fields, as needed. **Note:** The Online Registration Form can be viewed in two modes. Use the check box at the top of the page to toggle between multitab or single-tab mode. The chosen mode is what parents will see on the parent portal.

Online Registration Form					
Uncheck to change look and feel back to 'Flat mod	e'	Ac	ademic Year	2013-14	
Description	Field	Grade Levels			
Student Information	Tab		edit		
Please complete all student information fields.	Header	All	edit delete		
Is your child returning?	Student Returning	All	edit		
Please verify your home address.	Physical Address	All	edit delete		
Please verify your phone number.	Home Phone	All	edit delete		
Family Information	Tab		edit		
Please complete all family information.	Header	All	edit delete		
Allow family information to be updated?	Yes		edit		
Emergency Contacts	Tab		edit		
Please complete all emergency contact information.	Header	All	edit delete		
Allow contact information to be updated?	Yes		edit		
Miscellaneous	Tab		edit delete		
Please complete all of the following fields.	Header	All	edit delete		
Create Field Preview Form Back	·				

Main > Online Registration > Registration Process > Edit Form

Create Field

Create a new field to add to the registration form. Enter a description and min/max grade level for the field, as needed. Select the field from the provided dropdown list. Fields consist of commonly used student data along with any custom student data fields defined by your school and/or district. **Note:** Use the "Sort" option to indicate where to place the new field.

Preview Form

Review the form to see what parents will view on the parent portal. Select a specific student or grade level to see the corresponding form details.

<u>Edit</u>

Modify chosen registration field details. **Note:** If you don't want parents to update contact information online, edit the corresponding field and change the value to "No". **Note:** When in tab mode, you can edit the tab field to change the description.

Delete

Remove a registration field from the form.

29.2.3 Copy Registration Process

Copy online registration process steps and corresponding forms/attachments from one academic year to another.

Copy Re	gistrati	on Process From	2011-12			
Copy Re	gistrati	on Process To	2012-13			
Сору	Step		Description	Grade Level	Attachments	Track Completion
•	1	Complete Regis existing form in	Complete Registration Form (This form will replace the existing form in the next year)			yes
2	2	Please sign and school office.	Please sign and return the following document(s) to the school office.		Internet Access Approval.doc Picture Consent Form.doc	yes
V	3	Please review th school year with	e following document(s) for the upcoming your student(s)	All	Student Handbook	yes

Main > Online Registration > Online Registration Process > Copy

Choose the academic years to copy existing registration process steps from/to.

Select the steps to copy. **Note:** If a registration form exists in the "copy to" year, the existing form will be overwritten. **Note:** All forms and attachments for chosen steps will also be copied.

29.3 Registration Fees

View/manage registration fees for a chosen academic year. Define mandatory and optional fees by grade level. Assign fee amounts based on student need; allow waivers, as needed. Align fees with an account and category as defined in <u>Main > Tuition/Fees > Accounts</u>. **Note:** The Online Registration District Option "Enable Calculation of Registration Fees" must be set to "Yes" in order to use this functionality. See <u>Main > Online Registration > Registration Options</u> for more details.

Registration Fees					Academic	Year: 2013-14	1
Create Registration Fe	ee Back						
Description	Mandatory/ Optional	Fee Amount	S	Account	Category	Grade Levels	
Kindergarten Registration	Mandatory	Student Type	Amount	General	Registration	K	edit delete
registration		Paid	\$50.00			K <u>uerete</u>	uerete
		Free	\$0.00				
		Reduced	\$25.00				
		Direct Certified	\$0.00				
		Registration Fee Waiver	\$0.00				
Registration Fee	Mandatory	Student Type	Amount	General	Registration	5670	edit delete
		Paid	\$150.00		ree	5, 0, 7, 0	uelete
		Free	\$0.00				
		Reduced	\$75.00				
		Direct Certified	\$0.00				
		Registration Fee Waiver	\$0.00				

Main > Online Registration > Registration Fees

Create Registration Fee

Define mandatory and optional fees to be charged during student registration.

Edit

Modify existing fee details. Set fee to active/inactive.

Delete

Remove the registration fee from the chosen academic year.

29.3.1 Create Registration Fee

Define mandatory and optional registration fees by grade level. Align fees with existing school accounts and categories. Set fee amounts based on student need.

Main > Online Registration > Registration Fees > Create Registration Fee

Mandatory Fees: Define mandatory registration fees:

Create Registra	tion Fee			
Description:				
Mandatory/Optional:	Mandatory 💌			
Fee Amount:	Student Type	Amount		
	Paid			
	Free			
	Reduced			
	Direct Certified			
	Registration Fee Waiver			
Account:	Club Fees	·		
Category:	Art Club			
Grade Levels:	00 🗆 EC 🔲 PK	КПК		
	□ 1 □ 2 □ 3	☐ 4		
	5 6 7	8		
	🗆 9 🗖 10 🗖 11	□ 12		
	🗖 PG 🗖 Other 🗖 UN			
	🗆 SM 🗖 SS			
Save Back				
		Þ		

Enter a description for the mandatory fee.

Fee Amount: Enter fee amounts based on student type. **Note:** Available student types vary based on which online registration options are chosen. The above scenario shows student types based on having "When determining registration fee waivers, use lunch program information" set to "Yes" at <u>Main > Online Registration > Registration Options</u>.

Select the corresponding account and category for the fee. **Note:** Accounts and Categories are defined at <u>Main > Tuition/Fees > Accounts</u>.

Grade Levels: Assign the fee to chosen grade level(s).

	Create Registration Fee				
	Description:				
	Mandatory/Optional:	Optional 💌			
	Fee Amount:	 C Fixed Amounts C Parent Choice (parents can enter their own amount to charge) 			
	Account:	Club Fees			
	Category:	Art Club			
	Grade Levels:	□ 00 □ EC □ PK □ K			
		5 6 7 8			
		□ 9 □ 10 □ 11 □ 12			
		PG Other UN EE			
		SM 🗖 SS			
	Save Back		<u> </u>		
4					

Optional Fees: Define optional registration fees:

Enter a description for the optional fee.

Fee Amount:

- Fixed Amount: Enter a fixed fee amount based on student type.
- Parent Choice: Allow parents to enter an amount of their choosing. This is useful for items such as donations.

Remaining items work the same as for mandatory fees.

29.4 Parents Online Registration

The following outlines the parent's portion of the online registration process.

Once online registration is enabled, the "Online Registration" link is made available, on the parent portal, for custodial parents of students that were promoted to the year being registered. Parents can access the next year, even if it is marked as "Future", in order to complete online registration and pay the registration fees. **Note:** Parents need to have their own email addresses. They cannot register or pay fees using an email address shared with their children.

There are several possible parent workflows based on your school's setup:

- Parents login, fills out registration form, completes other steps. Parents select optional fees, enter lunch account \$, and complete payment online with credit card/echeck. Parents can request a fee waiver, as needed.
- Parent comes to the school, works with admin to select fees. Parent pays in person with cash/ check. Admins can request a fee waiver, as needed.
- Parent fills out registration form, completes other steps. Admins select and applies optional fees

and/or waivers. Parents complete payment online.

If the "Parent Login" <u>registration option</u> is set to "Display a reminder on main page", the provided message appears at the top of Parent Main during the registration timeframe:

	Parent Main							
	Welcome! TeacherEase helps teachers better communicate with parents and improve student performance. Choose any link below to view information about your student.							
	Student: Austin, Tom J	Year: 2012-13 Grade 10 💌						
	Announcement - Returning students should register for the 2013-14 school year by 7/12/13. Please click the online registration link below. Online Registration							
	Academics	Communicate	Miscellaneous					
	Schedule	Email Settings	Calendar					
	Assignments & Lessons	Announcements	Behavior Logs					
	Student Progress Update	Send Email to Teachers	Menus					
	Attendance	Email Logs	Fees					
	Report Cards	Digital Lockers	Online Registration					
	Course Registration		Donation					
			Update Email/Password		_			
4					•			

Parents click the "Online Registration" link to complete the registration process. Parents with multiple students in the district can view/complete registration for all students. First they will complete the registration form, then they can pay the corresponding fees.

Parent Main > Online Registration

lease complete all the s	steps below to r	egister your student(s) for the upcoming school year.		
		R	egistration Year	:2013
Student	Step	Description	Complete	
Austin, Tammi Gradeschool	1	Complete Online Registration Form	edit form	
Austin, Tom J Lincoln School	1	Complete Online Registration Form	edit form	
Austin, Ally Gradeschool	1	Complete Online Registration Form	edit form	

If the "Parent Login" <u>registration option</u> is set to "Registration form must be filled before access is granted", the message, below, is shown at the top of Parent Main and the registration form will automatically "popup" to be completed. The parent must fill out and save the form before they can access any of the other information on the Parents pages, including grades.

Parent Main	>	View	Student	Registration	>	Registration	Form
-------------	---	------	---------	--------------	---	--------------	------

Main	Logout	Support			
Please complete the registration form for the new academic year before you can access other student information.					
Parents fill out the student registration form, including any fields added to the student information section. If allowed, they can also update their child's contact information and add emergency contacts. **Note:** For parents with multiple students, they can update the contact information for one, and the same information will be propagated to all of their students. Items at the top of the form in the "Student Information" box, must be updated per student.

Registration Form	
Please fill out the online registration form for each of your returning students. Cli Student: Austin, Tom	ick "Save" when complete. Registration Year: 2011-1
Student Information	
Will your child be returning this year?	
Student's Home Phone 555-555-5555	
Custodial Parent/Guardian	Custodial Parent/Guardian
Name: Melissa Austin	Name: Tony Austin
Relationship: Mother	Relationship: Father
Address 1: 123 Way	Address 1: 123 Way
Address 2:	Address 2:
City, State Zip: IL 💽 60134	City, State Zip: 60134
Home 555-555-5555 Work Phone:	Home 555-555-5555 Work Phone:
Other Phone: Cell Phone: 555-123-4567	Other Phone: Cell Phone: 555-123-9876
Can Pickup 🔽	Can Pickup 🗹
Save Add Emergency Contact Back	

Once a parent has updated and saved a registration form for a student, that step will be marked as "Complete" and they will not be able to make any additional changes to the form. If more changes are needed, the Admin can edit the student's registration status and "reset" the form. This will remove any previous changes made by the parent and allow them fill out the registration form again. See " <u>Edit Registration Status</u>" for more details.

Parents can view current status of the online registration for each of their students, see each process step and access any attachments. **Note:** Admins have to manually update the "Complete" status for steps other than the registration form. See "Edit Registration Status" for more details.

	Online Registration Please complete all the steps below to register your student(s) for the upcoming school year.							
			R	egistration	Year: 2013-14			
	Student	Step	Description	Complete				
	Austin, Tom J	1	Complete Online Registration Form	edit form				
	Lincoln School	2	Please sign and return the following document(s) to the school office. Internet Access Approval.doc Picture Consent Form.doc	~				
	Payments - Please select any optional fees and pay mandatory fees to complete your student's registration							
	Back							
•								

Parents edit the form and complete the information, then Save.

lease fill out all tabs in the online	registration form	m. Click 'Next >>' to get to la	ater tabs. Click 'Sav	e' when com
tudent: Austin, Tom J				
Save << Prev Next >> Bac	k			
				_
Student Information Family	Information	Emergency Contacts	Miscellaneous	
·,		Leou	1	
Is your child returning? Yes				
	Address 1	123 Way		
	Address 2			
Please verify your home address	Address 3			
	City, State Zip	Aurora	IL	• 60134
		·		

Once the registration forms are completed, parents can use Online Payment to <u>pay their student</u> <u>registration fees</u>. Parents can also <u>apply for fee waivers</u>. **Note:** District options must be set to enable these functions.

29.4.1 Parents Pay Fees

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Admin Basic Setup

If the corresponding options are set, once parents complete all registration forms they can use Online Payment to pay their student registration fees. They can also add money to their student's lunch account. Parents can request a registration fee waiver, as needed.

Parent Main > Online Registration > Pay Registration Fees

Pay Registr	ation Fe	es					
Select optional f	ees you wi	sh to pay for the upcoming school year. Mand	atory fees have been automatica	ally selected.			
Registration Year: 2							
Student	Selected	Fee	Amount				
Austin, Tom J		Club Fee	\$15.00				
Lincoln School Paid Student		Registration Fee	\$150.00				
		Deposit for student lunch account (optional)	\$10				
	Subtotal:		\$175.00				
Payment Total:	Payment Total:		\$175.00				
Continue Request Registration Fee Waiver/Free-Reduced Lunch			Back				

Parents with multiple children can select and pay fees for all students in the district. Mandatory fees are automatically selected. Parents can select optional fees, as provided.

Pay Registrati	on Fees						
Select optional fees	s you wish to	pay for the upcoming school year. Mandatory	fees have been automatically s	elected.			
			R	Registration Year: 2013-14			
Student	Selected	Fee	Amount				
Austin, Tammi		Registration Fee	\$150.00				
Gradeschool Paid Student		Club Fee (optional) - \$15.00	\$15.00				
		Deposit for student lunch account (optional)	\$5				
	Subtotal:		\$170.00				
Austin, Tom J		Registration Fee	\$150.00				
Paid Student		Club Fee (optional) - \$15.00					
	•	Drama Club (optional) - \$25.00	\$25.00				
		Deposit for student lunch account (optional)	\$10				
	Subtotal:		\$185.00				
Austin, Ally		Registration Fee	\$0.00				
Gradeschool Fee Waiver Studen	it 🔽	Club Fee (optional) - \$0.00	\$0.00				
		Deposit for student lunch account (optional)	\$5				
	Subtotal:		\$5.00				
Payment Total:			\$360.00				
Continue Requ	Continue Request Registration Fee Waiver/Free-Reduced Lunch Back						
4.1							

In the scenario above the parent has 3 children in the district. The district option was set to waive fees after the 2nd child, so their third child has had their registration fees waived.

If parents enter lunch deposits, amounts will be added to the corresponding student lunch accounts.

Once parents select the optional fees, they can complete their fee payments online. This works the same as <u>Online Payment of Parent Fees</u> for Tuition/Fees and Lunch. If paying for students in multiple schools they will receive a receipt for each school.

	Choose Payment T	уре	•
	*Payment Type:		
	*Credit Card Number:		
	*Expiration Date (mm/yy):	(e.g. 05/05)	
	*CVV Code: [?]		
	School:Lincoln SchoolTotal:\$175.00		
	Continue Back	_	
	District Policy: Refund Pr	<u>tivacy</u>	Ŧ
4		Þ	

29.4.2 Parents Request Waiver

If the corresponding options are set, parents can enter household information to determine eligibility for registration fee waivers and free/reduced lunch.

Parent Main > Online Registration > Pay Fees > Request Registration Fee Waiver/Free-Reduced Lunch

Request Registration Fee Waiver/Free-Reduced Lunch					
This page allows you to submit income information and apply for registration fee waivers and free-reduce lunch. Eligibility will be calculated below.					
Students in Family: Austi	n, Tammi; Austin, Tom J; Aust	in, Ally	Registration Year: 2013-14		
	Ca	Iculation Information			
Household Size:	5				
Income Amount:	35000	Annual			
Date Requested:	6/27/2013				
Calculate Eligibility					
	C	Calculated Eligibility			
Eligibility: Free					
Based upon household size and income, you're eligible for free lunch pricing. To complete the application process, you may be required to bring paperwork documenting your income to the school. Please contact the school with any questions.					
Submit for Approval	Back				

Parents enter the household information and then "Calculate Eligibility". If they meet the eligibility requirements, the may submit their request for approval to the school.

They will need to wait for confirmation of the approval prior to completing the payment process. They will also get the following message at the top of the "Pay Registration Fees" page:

The household size and income you entered calculate to fee waiver eligibility of 'Free' status. Prior to seeing the 'Free' rates for registration fees (if applicable) you will need to have this request approved by your school. This may involve providing proof of income (paycheck stub, W-2 form, etc). Please contact your school if you need more information.

After the school approves or denies the waiver, parents can pay any remaining fees online, if enabled.

If the calculation results in them being ineligible for a waiver, they can continue with paying their fees online, or contact the school with further information.

29.5 Student Registration Status

View/manage student registration status. View/modify status details for chosen student(s). Track progress status at bottom of page.

View student registration status for a chosen academic year. Narrow details by student return status, registration form status, registration status and/or grade level. Quickly find all returning students with incomplete registration status.

	Stude	nt Registratio	on Status						
	Online R	ine Registration Form Status: All Grade Level: 11 - Eleventh Grade			•]			
	Registration Fee Waiver and Lunch Status: All Registration Status: All			•			Student Retur	ning: All 💌]
							Payment Status:	All]
						Acade	mic Year: 2013-14	•]
	Grade Level	Student	Online Registration Form Status	Student Returning	Registration Fee Waiver and Lunch Status	Payment Status	Registration Status		
	11	Austin, Tom J	Completed/Reviewed	Yes	None	Not Paid	In Process	<u>view edit</u> apply fees delete	
	11	Creston, Daniel C. "Danny"	Awaiting Review	Yes	Approved - Free/Waived	Not Paid	In Process	<u>view edit</u> apply fees delete	
	11	Jacobs, Harry	Not Completed	Yes	None	Not Paid	No Contact Yet	<u>view edit</u> apply fees	
		Count: 14	Not Complete: 12 (85.7%) Awaiting Review: 2 (14.3%) Completed/Reviewed: 0 (0%)	No Response: 11 (78.6%) Returning: 3 (21.4%) Not Returning: 0 (0%)	None: 13 (92.9%) Awaiting Review: 0 (0%) Approved: 1 (7.1%) Rejected: 0 (0%)	Paid: 0 (0%) Not Paid: 14 (100%)	No Contact Yet: 12 (85.7%) In Process: 2 (14.3%) Complete: 0 (0%)		
4	MassE	dit Mass Apply	/ Fees Printable Bac	:k					•

Main > Online Registration > Student Registration Status

Mass Edit

Update registration status for many students at once.

Mass Apply Fees

Apply registration fees to many students at once. **Note:** Students must be marked as returning to apply fees. Mandatory fees are automatically applied, optional fees can be selected.

<u>View</u>

Review a chosen student's registration status. Preview their registration form and any changes made to their contact information. Forms can also be completed, if necessary. Registration fee waivers can also be reviewed/approved.

Edit

Modify a chosen student's registration status details. Mark when paper forms have been returned to the office. See the Edit Registration Status section for more details.

Apply Fees

Apply optional registration fees to a chosen student's account. Setup registration fees for all students in a family. **Note:** Student must be marked as returning to apply fees.

29.5.1 Mass Edit Registration

Update registration status for multiple students.

Main > Online Registration > Student Registration Status > Mass Edit

I	Mass Edit Registration								
	Student	Returning:	All 💌	Reg	istration Form Statu	s: All			
	Registra	ation Status	rade Level: All	•					
	Academic Year: 2011-12								
	Save Back								
			Inform	nation to Edit					
	Student	t Returning:				Yes 💌			
	Registr	ation Status	3.			•			
	Comple	ete Registra	ation Form						
	Please Intern Pictur	sign and re net Access / re Consent	eturn the following document(s) to the scho Approval.doc Form.doc	ool office.					
	Please Stude	review the r ent Handbo	following document(s) for the upcoming so ok 2011.doc	chool year with yo	ur student(s).				
		Grade Level	Student	Student Returning	Registration Status	Registration Form Status			
		7	Adams, Mary		No Contact Yet	Not Completed			
		7	Adams, Melissa		No Contact Yet	Not Completed			
		6	Andrews, Randy		No Contact Yet	Not Completed			
Ì	1					•			

Narrow students by selecting details from dropdown lists at the top of the page.

Information to Edit: Enter information to update for the selected students.

Select the students to update and "Save".

29.5.2 Mass Apply Fees

Apply registration fees to many students at once, as needed. Mandatory fees are automatically applied to students in the corresponding grade level(s). Allow parents to select optional fees, or apply optional fees for them.

	Mass A	pply Fees				
	Grade Lev	vel: 11 - Eleve	enth Grade	•	Academic Year: 2013	-14 💌
	Save	Save Back				
	Fee to Apply					
	Registrat	Registration Fee: Registration Fee Grade Level				
				Student	Fee Waiver and Lunch Status	Price
		11	Austin, Tom J		None/Not Waived	\$150.00
	Image: Creston, Daniel C. Image: Creston, Daniel C. Image: Creston, Daniel C. Image: Creston, Daniel C. Image: Creston, Daniel C.		Danny"	Free/Waived	\$0.00	
			None/Not Waived		\$150.00	
	Count: 3					
	Save E	Back				
•						•

Main > Online Registration > Student Registration Status > Mass Apply Fees

Narrow student list by grade level, as needed.

Select the fee to apply to the students.

Select the students to receive the fee and Save.

29.5.3 Edit Registration Status

Manage/update details for the student's registration status. Review the online registration form status. Mark finished items as complete. Update status when paper forms have been signed/returned to the office. Admins can also review/request registration fee waivers and apply optional registration fees from this page. They can also complete registration forms for the parents, when needed.

	Edit Registration Status							
	Student	: Austin, Tom J	Academic Year: 2013-1					
	Student	Returning:	Yes 💌					
	Registr	ation Status:	In Process					
	Online I	Registration Form Status:	Awaiting Review					
	Registr	ation Fee Waiver and Lunch Status:	None request					
	Paymer	nt Status	Not Paid					
	Notes:				 ▼			
	Step	I	Description	Complete				
	1	Complete Online Registration Form Parent has made changes		Awaiting Review	review			
	2	Please sign and return the following o	document(s) to the school office.	No 💌				
	Save	Mark all complete Save & Apply F	Registration Fees to Student Account(s) Bac	k		•		
•								

Set/update a student's registration status information. Add notes when needed. Mark when all paper forms have been returned to the office.

Mark all complete

Sets all registration steps to Complete=Yes and updates "Registration Status" to "Complete".

Save & Apply Registration Fees to Student Account(s)

Saves any updates to this page and takes you to the "Apply Fees" page.

Review the registration form. Request a fee waiver.

29.5.3.1 Review Registration Form

Review changes made to student/contact data during the online registration process. Mark as reviewed, rollback changes, or reset the form to allow parents to start over.

Main > Online Registration > Student Registration Status > [View or Edit] > Review

	Review Onlin	e Registration F	orm Data				
	Student: Austin, To	om J					
	Show change	s only					
	Student/Contact	Field	Old Value	New Value			
	Austin, Tom J	State Health Exams		Y			
		Phone	555-555-5556	555-555-5555			
		Physical Zip		60134			
		Physical State		IL			
		Physical City		Aurora			
		Physical Address 1		123 Way			
Rollback student changes							
Rollback contact changes							
	Save & Mark Rev	viewed Save, But R	leview Again La	ter Reset Ba			

Use check boxes to rollback student and/or contact changes made on the registration form.

Save & Mark Reviewed

Save the form and update the online registration form status to "Completed/Reviewed".

Save, But Review Again Later

Save the form, but keep the online registration form status marked as "Awaiting Review".

Reset

Remove any changes parents made to the online registration form and allow them access again from the parent portal. This includes both student and contact information.

29.5.4 Apply Fees

Apply fees and pay registration fees. Useful when parents come to the school to pay their registration fees.

	Apply Regis	stration	Fees to Student Account(s)		_
					Academic Year: 2013-14
	Student	Selected	Fee	Amount	
	Jacobs, Sam		Registration Fee	\$150.00	
	Lincoln School Paid Student		Club Fee (optional) - \$15.00		
		~	Drama Club (optional) - \$25.00	\$25.00 remaining	
			Deposit for student lunch account (optional)	\$ 10	
	Subtotal:		·	\$185.00	
	Payment Total:	:		\$185.00	
	Save & Contin	ue Back			
•					•

Main > Online Registration > Student Registration Status > Apply Fees

Apply optional registration fees to a chosen student's account. Enter student lunch account deposit, as needed.

<u>Save & Continue</u> Save the fees/deposits and continue with payment.

	Pay Regist	ration Fees						
	Student: Jaco	bs, Sam (1684) - 7 [L 🔻 Sea	rch:	lacobs		Academic Year: 2013-14	•
	Create Payme	ents/Deposits	Back					
	Student	Account	Description		Amount		Payment Details	
	Jacobs, Sam Lincoln	Club Fees 🗕	Current Balance:	\$	(25.00)	Total Payment:	185.00	
	School - 7		Payment:	\$	25.00	*Date:	Friday 6/28/2013	
			New Balance:	\$	0.00	*Payment Type:		
		Course Fees	Current Balance:	\$	0.00	Notes:	-	נ
		General –	Current Balance:	\$	(150.00)			1
			Payment:	\$	150.00			
			New Balance:	\$	0.00			
		Lunch +	<u>Current</u> Balance:	\$	0.00			
		Tuition 🕂	Current Balance:	\$	0.00			
	Jacobs, Sam F	Payment Total:		\$	185.00			
			Total Paym	nent: \$	185.00			
	Create Paym	ents/Deposits	Back					-
•								•

Enter payment information and log deposit details for corresponding accounts. Details can be viewed for the student at <u>Main > Tuition/Fees > Fees</u> for a chosen account.

29.6 Registration Fee Waiver/Lunch Status

Review/approve/request registration fee waivers and update student lunch program status.

Main > Online Registration > Registration Fee Waiver/Lunch Status

	Registration Fee Waiver/Free-Reduced Lunch Status										
	Status:	All		Grade Level: All							
						Academic Ye	ar: 2013-14 💌				
	Grade Level	Student	Status	Lunch Program	Direct Certified	Registration Fee Waiver					
	11	Austin, Tom J	Awaiting Approval	None	No	No	<u>view requests request</u> waiver				
	11	Creston, Daniel C. "Danny"	Approved	Free	No	Yes	<u>view requests request</u> waiver				
	11	Jacobs, Harry	None	None	No	No	<u>view requests request</u> waiver				
	11	Jones, Jacquelyn May "Jackie"	None	None	No	No	<u>view requests request</u> waiver				
	11	Jones, Joe	None	None	No	No	<u>view requests request</u> waiver				
		Count: 5	None: 3 (86.67%) Awaiting Approval: 1 (6.67%) Approved: 1 (6.67%)	None: 4 (93.33%) Reduced: 0 (0%)	Yes: 0 (0%) No: 5+ (100%)	Yes: 1 (6.67%) No: 4 (93.33%)					
			Rejected: 0 (0%)	Free: 1 (6.67%)							
	Mass	Approve Printable Ba	ack					-			
4											

Narrow by status, grade level and chosen academic year.

Mass Approve

View/approve many student waiver requests at once.

View Requests

View/approve a request for a chosen student. Update student lunch program information. When the request is approved the lunch program information is automatically populated. **Note:** If multiple students in the same family are in different schools in the district, review/approval of requests must be done for each student, per school.

Once all students are approved, the parents will be able to pay their fees online, when that option is enabled.

Request Waiver

Enter a waiver request for a chosen student. Useful when admins need to request waivers for parents. Once saved you are taken to the "Review" page to view the request and either approve or reject it.

Student Austin, Forma								Acqueinie	Tean. 2013
Registration Fee Waiver/Free-Reduced Lunch Request									
Income & Household Size:	Date Rec	uested	House	hold Size	Income	e Amount	Timeframe	Eligibility	
	6/27/2013	3	5		35000		Yearly	Free	
Status:	Approved								
Approve Reject Fields Which Control Lunch and Registration Fee Pricing									
Lunch Program:			nch Iram	Effec Dat	tive ie	Direct Certified	Ŧ		
		Free	•	8/15/20	13 💌	No 💌			
Registration Fee Waiver:			•		•	No 💌			
			Yes 🔻						

Manually set the lunch program, if needed.

29.7 Registration Details

Generate a report to view student progress in completing online registration. View status of returning students.

Who: • Grade Level • Grade Level • Grade Level • Select All • Group • Student Returning: • All • All	
Who: Grade Level 6 - Sixth Grade 9 - Ninth Grade 9 - Ninth Grade 11 - Eleventh Grade 12 - Twelfth Grade 12 - Twelfth Grade 12 - Twelfth Grade Student Returning: All	-
C Group Student Returning:	
Student Returning:	
Registration Status All	
Registration Form Status All	
Normal Web Page Printable Page Normal Labels C Envelopes Comma Delimited (CSV) Printable Letter Email	
Generate Back	

Main > Online Registration > Registration Details

Generate a report by grade level or group. Determine details to include on the report. Automatically send email or generate printable items.

Below is an example of a report snowing all information for gra	rade 11:
---	----------

Student Registrat Academic Year: 2013-1 Grade Level: 11	tion Details		
Back			
Name	Student Returning	Registration Status	Form Status
Austin, Tom J	Yes	In Process	Completed/Reviewed
Creston, Daniel C.	Yes	In Process	Not Completed
Jacobs, Harry	Yes	No Contact Yet	Not Completed
Jones, Jacquelyn May	Yes	In Process	Not Completed
Jones, Joe		No Contact Yet	Not Completed
Jones, Maureen Lynne		No Contact Yet	Not Completed
Preston, Fredrick		No Contact Yet	Not Completed
Reddy, Ian		No Contact Yet	Not Completed
Smith, Sam		No Contact Yet	Not Completed
Smith, Susan		No Contact Yet	Not Completed
Spector, Sally		No Contact Yet	Not Completed
Suchmore, Mary		No Contact Yet	Not Completed
Tank, Tim		No Contact Yet	Not Completed
Time, Justin		No Contact Yet	Not Completed
Count: 14	No Response: 10 (71.43%) Returning: 4 (28.57%) Not Returning: 0 (0%)	No Contact Yet: 11 (78.57%) In Process: 3 (21.43%) Complete: 0 (0%)	Not Complete: 13 (92.86%) Not Reviewed: 0 (0%) Completed/Reviewed: 1 (7.14%)

View progress status at bottom of page.

30 Help/Training/Videos

Access user documentation/help, online training and instructional videos.

Main > Help/Training/Videos

	Help, Training, and Videos	
	Help Online Training Videos	_
	All files are PDF format and require Adobe Acrobat to view.	
	Admin Guides	
	Basic Setup [PDF] Attendance [PDF]	
	Grade Reporting [PDF]	
	Multilingual [PDF] Scheduling [PDF]	
	Advanced Scheduling [PDF]	
	Tuition/Fees [PDF]	
	Curriculum Mapping [PDF]	
	Lunch [PDF]	
	Discipline [PDF] Longitudinal Data Analysis [PDF]	
	Health Records [PDF]	
	District Admin Guide [PDF]	
	Instructor Guides	
	Secondary User's Gradebook Guide [PDF] Secondary User's Planning Guide [PDF]	
	Self-Contained User's Gradebook Guide [PDF]	
	Self-Contained User's Planning Guide [PDF]	Ţ
•		٢

Use the tabs to access the desired information:

Help: Access online product help for Admins and Instructors. Click a link to immediately access the corresponding help files. Access a PDF version of the corresponding User Guide by clicking the [PDF] link next to the topic. **Note:** Context sensitive help for any page can also be accessed by clicking "Online Help" under the "Help" tab when on a page. Individual help pages can also be printed.

Online Training: Access training materials for Admin product training. Each training is comprised of individual lessons which can be viewed in any order desired by click the corresponding link. Access a PDF version of the training slides and notes by clicking the [PDF] link next to the training title.

Videos: Access instructional videos for Admins and Instructors on a specific product topic. These videos can also be accessed by clicking "Videos" under the "Help" tab.