



Demographics Training Information

Description: Student Demographics contains a wide range of information on students all in one place. There are over thirty unique tabs in the Student Profile and Browse areas. Demographics training focuses on six unique tabs: General, Entity, Categories, Family, Emergency and Entry/Withdrawal. The Busing, Locker, and Activity tabs will be covered as well as their corresponding buttons. The processes for adding and maintaining demographic information will be covered extensively. Student Demographics reporting will be covered (including Data Mining). Student related utilities will be demonstrated. Navigation, filter options and preferences in the client will be explained.

Click the following link to view an overview tutorial for the Demographics module: [Demographics Overview](#)

NOTE: Underlined items on the agenda are links to more information. Pressing the Ctrl button on the keyboard and clicking the link in the document at the same time will launch the item. You may receive a prompt asking if you wish to open the document. Click OK.

Interaction: The Demographics module affects all other student records related modules due to it being the foundation for all subsequent student records tracking.

Audience: This training is intended for secretaries or other individuals who are involved in basic data entry and reporting. Other staff that may find this training helpful include administrators involved with the entry of and maintenance of new and existing students as well as reporting on this information.

Outcome: Upon completion of this training class, the attendee will be able to do the following:

- Successfully log in and navigate through the program.
- Successfully change to a different student and inquire on all demographic data.
- Thoroughly understand selection filters, student alphakeys and ranges.
- Successfully add a student, including family and emergency contact information.
- Successfully withdraw and re-enter students as needed.
- Successfully create and process Demographic reports including Data Mining.

Resources: Click [here](#) for printable step-by-step information

Best Practices: Click [here](#) for best practice information



Demographics Class Outline

Session 1

General System Overview

- ☐ Overview of the Demographics module (2-5 minutes)
- ☐ Training resources: Documentation, [Forum](#) & [Website Review](#)

Log In Options

- ☐ Log in via the web URL
- ☐ Checking version of the software

Security and Codes

- ☐ Explanation of a screen based on Security Access
- ☐ [Explanation of Codes concept](#)
- ☐ Explanation of AlphaKey

Navigation

- ☐ Arrow buttons
- ☐ Lookup box entry
- ☐ Student Hyperlink
- ☐ Single click/select vs. double click/open
- ☐ Highlight on changes and focus
- ☐ Expand and collapse function
- ☐ Student Indicator
- ☐ Camera – Print Screen
- ☐ Create New Window
- ☐ Preferences

Entity Concept

- ☐ Multiple Entity concept – with specific focus on one Family record
- ☐ Entity - Building - School - Calendar

- ☐ **Review of items discussed in this session** (2-5 minutes)



Session 2

☐ Overview of areas to be covered in this session

Student Inquiry Options (Student Browse and Profile)

- ☐ Changing Entities
- ☐ Student Profile
 - ☐ Ranges
 - ☐ [Student lookup options](#)
 - ☐ Customize Tabs
- ☐ Student Browse
 - ☐ Filters
 - ☐ Look up by last name ID, etc.

Overview of Student Demographics

- ☐ General Tab
 - ☐ Profile
 - ☐ Address
 - ☐ School Path
 - ☐ Vehicles
 - ☐ Web Access
 - ☐ Change History
 - ☐ Notes
- ☐ Entity Tab
 - ☐ Entity Info
 - ☐ Default Entity
 - ☐ Obligations
- ☐ Categories Tab
 - ☐ District
 - ☐ Entity
- ☐ Family Tab
 - ☐ Head of Household
 - ☐ Family Order
 - ☐ Sibling view
- ☐ Emergency Tab
 - ☐ Alert Information
 - ☐ Emergency Contacts

☐ Review of items discussed in this session (2-5 minutes)



Session 3

☐ **Overview of areas to be covered in this session** (2-5 minutes)

Student Add Process

- ☐ Click ADD button to begin Student Add process
- ☐ Search for name to avoid duplicates
- ☐ Complete one Student Add as demonstration
- ☐ Set up individual Entry Defaults
- ☐ Complete one Student Add together – as a group
 - ☐ Complete General, Entity, and Entry information data entry
 - ☐ Enter family and emergency information
- ☐ Add a second student at individual pace
- ☐ Transfer a Student

Family Maintenance Options

- ☐ Adding a Family vs. Adding a Guardian
- ☐ Family Changes
 - ☐ Parents are separating and student is staying at current address
 - ☐ Parents are separating and student is moving from current address with one parent
 - ☐ Parents are separating and one parent (or both) are remarrying
 - ☐ Parents are transferring custody to another party (Foster Care)
 - ☐ Student becomes his/her own Guardian
 - ☐ Former student returning as a guardian for another student

☐ **Review of items discussed in this session** (2-5 minutes)



Session 4

- ☐ **Overview of areas to be covered in this session (2-5 minutes)**

Entry & Withdrawal Process

- ☐ Withdraw and re-enter several students
- ☐ Status Change
- ☐ View Entry/Withdrawal history for other Entities

Demographics Reports

- ☐ Templates
 - ☐ Add, view, edit and clone
 - ☐ My and Shared Templates
 - ☐ Ranges screen
 - ☐ Print Queue
 - ☐ Student Reports
 - ☐ Student Information Report
 - ☐ Duplicate Alphakey
 - ☐ Duplicate Other-ID
 - ☐ Entry/Withdrawal Report
 - ☐ Student Cross-Reference List
 - ☐ Student Notes
 - ☐ Student Registration/Emergency Form
- ☐ Data Mining
 - ☐ Browse Screen
 - ☐ Setup
 - ☐ Field Selection
 - ☐ Running a Data Mining Report
 - ☐ Processing Lists
 - ☐ Address Labels
 - ☐ Information Labels

Custom Forms - Setup and Data Entry Procedures

- ☐ Add fields
- ☐ Build screens 10.
 - ☐ Data Entry and Reporting (Data Mining)



Session 5

☐ **Review of items discussed in this session** (2-5 minutes)

Lockers Processing

- ☐ Locker Codes
- ☐ Locker Area Codes
- ☐ Mass Assign Lockers
- ☐ Mass Unassign Lockers
- ☐ Locker Assignment Card Report

Busing and Busing Tab

- ☐ Busing Overview
- ☐ Add, Edit or Delete a Route
- ☐ Add, Edit or Delete a Bus Stop
- ☐ Bus Route Report

☐ **Review of items discussed in this session** (2-5 minutes)



Session 6

Activities

- ☐ Activities Master
- ☐ Add, Edit or Delete an Activity
- ☐ Add a student to an Activity
- ☐ Add Students by Class

Utilities

- ☐ Mass Change Processing
- ☐ Mass Add Students to Entity
- ☐ Mass Assign Homerooms
- ☐ Mass Assign Advisors

- ☐ **Review of items discussed in this session** (2-5 minutes)



Printable Resources

[Demographic Codes](#)
[Student Management Configuration](#)
[Product Setup Configuration](#)
[Student Profile and Lookup Options](#)
[Student Add Process](#)
[Entry/Withdrawal Tab](#)
[Report Templates](#)
[Demographic Reports](#)
[Print Queue](#)
[Building a Custom Form](#)
[Advanced Custom Forms](#)

Best Practices

[Student Indicators](#)
[Security Concepts](#)

[\(back to top\)](#)