



AdminPlus Contact DB User Guide

LEARN OUR SOFTWARE STEP BY STEP

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Rediker Software
2 Wilbraham Road
Hampden, MA 01036
800-882-2994
Visit our website at rediker.com.

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Introduction

Customize Your Database and Manage Students' Contacts

The Contact Data Base gives your school the convenience of having all students' contacts in one easily accessible location. You can quickly export contact information to Microsoft Excel®, and print the database records. Manage individual contact information and households, as well as format various database fields. Edit and customize user rights to ensure that contact information is accessible or restricted to certain users, depending on your preferences.

This Contact Data Base Guide takes you through the most common tasks of this unique database. These tasks include adding and removing contacts, customizing the appearance of certain fields, creating and editing households, and printing contact information. By completing this guide, you'll gain essential knowledge to help you set up and maintain your Contact Data Base in a manner that's most effective to your school.

How to Read This Guide

If you're familiar with our other user guides, you'll find this guide to be organized similarly. Each chapter contains modular topics related to the main theme of the chapter, and each topic focuses on helping you accomplish a specific task. The topics are independent from each other, so you can read the guide in any order and skip to a particular topic and task, based on your needs.

As you follow the steps in a topic, you'll come across supplemental information to further help accomplish the task. The illustrations clarify any possible points of confusion. The note boxes provide you with useful information you should be aware of regarding a particular step. The tip boxes offer advice on options and alternative ways to use the system, which could make your life easier. The warning boxes contain critical information to help you avoid errors or other problems.

CHAPTER 1

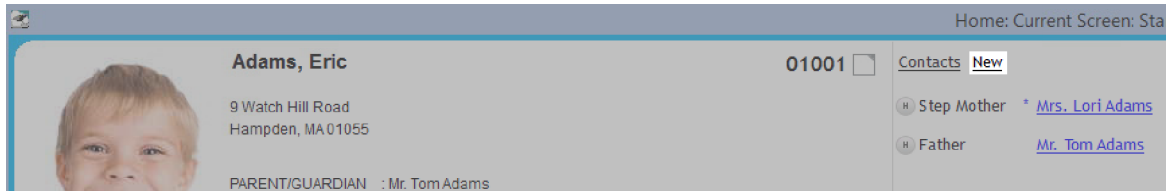
Manage Contacts

Add a New Contact	6
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Add a New Contact

Add a new contact to the database to keep track of the contact's information and how the contact relates to a student. You can enter specific information, such as whether or not the contact has custody of the child and which reports the contact should receive.

1. On the Demographics screen, click a student, and then click **New** in the student snapshot.



The screenshot shows a student snapshot for Adams, Eric. On the left is a photo of a young boy. To the right of the photo, the name "Adams, Eric" is displayed, followed by the address "9 Watch Hill Road, Hampden, MA 01055" and the phone number "01001". Below the address, it says "PARENT/GUARDIAN : Mr. Tom Adams". On the far right, there are two tabs: "Contacts" and "New". Below the "New" tab, there are two links: "Step Mother * Mrs. Lori Adams" and "Father Mr. Tom Adams".

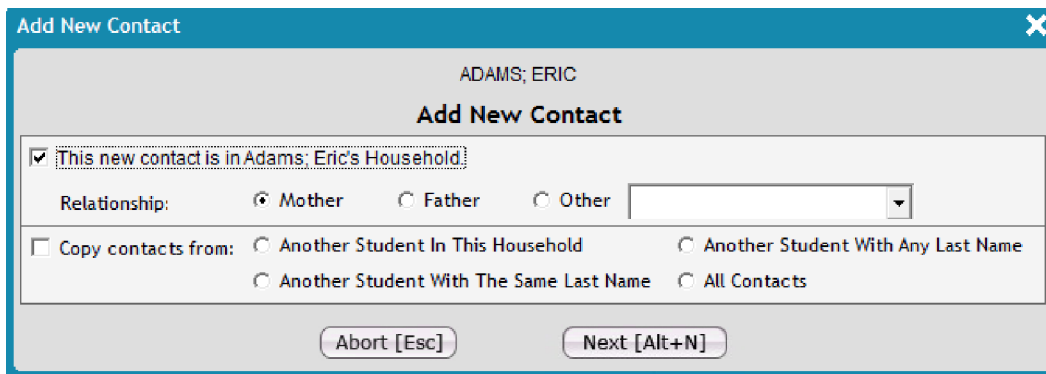
2. Optional: Select the **This new contact is in ... Household** check box if the new contact is a member of the selected student's household.

The contact's data will be automatically populated with the student's address and phone number in step 5.

3. Do either of the following:

- Click **Mother** or **Father**.
- Click **Other**, and click the correct relationship from the **Other** drop-down list, or enter a new relationship in the **Other** drop-down list.

4. Click **Next [Alt+N]**.



The screenshot shows a dialog box titled "Add New Contact" with a close button (X) in the top right corner. The dialog box is for the student "ADAMS, ERIC". It has a title bar "Add New Contact". Inside, there is a checkbox labeled "This new contact is in Adams, Eric's Household:" which is checked. Below this, there is a "Relationship:" section with three radio buttons: "Mother" (selected), "Father", and "Other". To the right of the "Other" radio button is a drop-down menu. Below the "Relationship:" section, there is a checkbox labeled "Copy contacts from:" which is unchecked. To the right of this checkbox are four radio buttons: "Another Student In This Household", "Another Student With Any Last Name", "Another Student With The Same Last Name", and "All Contacts". At the bottom of the dialog box, there are two buttons: "Abort [Esc]" and "Next [Alt+N]".

5. Enter the proper contact information in the **Global Fields** section of the **Contacts: Edit Mode** dialog box.

Global Fields: Fields that contain the contact's name, address, phone number, and employer information (among other fields illustrated below) are considered global fields because they remain the same for the contact regardless of the student that the contact is connected to.

Contacts: View Mode

Dr. Mary Ann Albrecht
(Mother of Adams, Eric)

Enter Student ID / Name

Contact 3 of 3 Lookup [F11]

Global Fields: Applies to this contact

Name: Dr. Mary Ann Albrecht Override

Salutation: Dr. Other Names

First Name: Mary

Middle Name: Ann

Last Name: Albrecht

Suffix: Language: ENGLISH

Household

Ada0001_07999

☒ Lives with this student

☐ Lives with another student ...

☐ Lives with no student

Local Fields: (Applies to the relationship of this contact with Adams, Eric)

Relationship: Mother New

☐ Primary Contact

☐ Enable Parent Portal Access

Allow which reports for 'Adams, Eric' to be sent to or printed for this contact?

☒ Data Base ☒ Scheduling

☒ Attendance ☒ Discipline

☒ Report Cards ☒ Billing

Address Copy From Other Addresses

Street: 9 Watch Hill Road

Line 1: Other Addresses

Line 2: Other Addresses

City: Hampden

State: MA

ZIP: 01055

[Setup Address Layout](#)

E-Mail Other E-Mails

Primary: ma.albrecht@mdgroup.org

Alternate:

Phone Other Phones

Home: (413) 444-6207

Mobile: (413) 555-1717

Office: (413) 567-1290 Extn. 116

User Defined Global Fields

Work: Dr. Albrecht's Office

Summer Home: Falmouth, MA

[Setup Global Fields](#) [Edit Global Fields](#)

User Defined Local Fields

Allow Pick Up: Yes

Custody:

No Release:

Court Orders:

[Setup Local Fields](#) [Edit Local Fields](#)

Exit [Esc] New [F2] Edit [F3] Delete [F8] Show All Fields [F9] Done [F10]

6. In the **Household** panel, do one of the following:
 - If this contact lives with your selected student, click **Lives with this student**.
 - If this contact lives with another student in the district click **Lives with another student**, click , click the appropriate student, and click **Select**.
 - If this contact doesn't live with any students, click **Lives with no student**.

7. Enter the proper contact information in the **Local Fields** section of the **Contacts: Edit Mode** dialog box.

Local Fields: Fields that are specific to the relationship between the student and the contact are considered local fields. For example, local fields define the relationship between the contact and the student, determine parent portal access and which reports should be sent to the contact, and they establish if the contact can pick up the child from school.

Contacts: View Mode

Dr. Mary Ann Albrecht
(Mother of Adams, Eric)

Enter Student ID / Name

Contact 3 of 3 Lookup [F11]

Global Fields: Applies to this contact

Name: Dr. Mary Ann Albrecht Override

Salutation: Dr. Other Names

First Name: Mary

Middle Name: Ann

Last Name: Albrecht

Suffix: Language: ENGLISH

Local Fields: (Applies to the relationship of this contact with Adams, Eric)

Relationship: Mother New

☐ Primary Contact

☐ Enable Parent Portal Access

Allow which reports for 'Adams, Eric' to be sent to or printed for this contact?

☒ Data Base ☒ Scheduling

☒ Attendance ☒ Discipline

☒ Report Cards ☒ Billing

User Defined Global Fields

Work: Dr. Albrecht's Office

Summer Home: Falmouth, MA

User Defined Local Fields

Allow Pick Up: Yes

Custody: No Release: Court Orders:

Setup Address Layout

E-Mail Other E-Mails

Primary: ma.albrecht@mdgroup.org

Alternate:

Setup Global Fields Edit Global Fields

Setup Local Fields Edit Local Fields

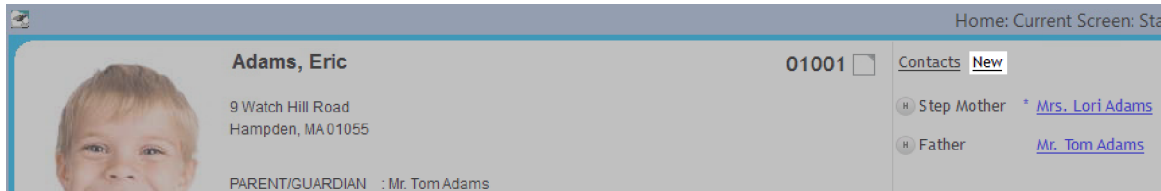
Exit [Esc] New [F2] Edit [F3] Delete [F8] Show All Fields [F9] Done [F10]

8. Click **Save [F10]**, and then click **Done [F10]** at the lower-right corner.

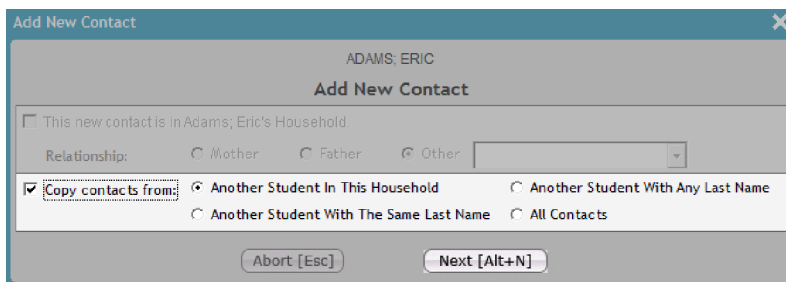
Add an Existing Contact

Transfer contact records from one student to another student, without duplicating the contact entry in the database. Conveniently change the relationship of the contact to each student as needed. For example, Lori is related to two students, but she's the mother of one student and the step mother of another student.

1. On the Demographics screen, click a student, and then click **New** in the student snapshot.

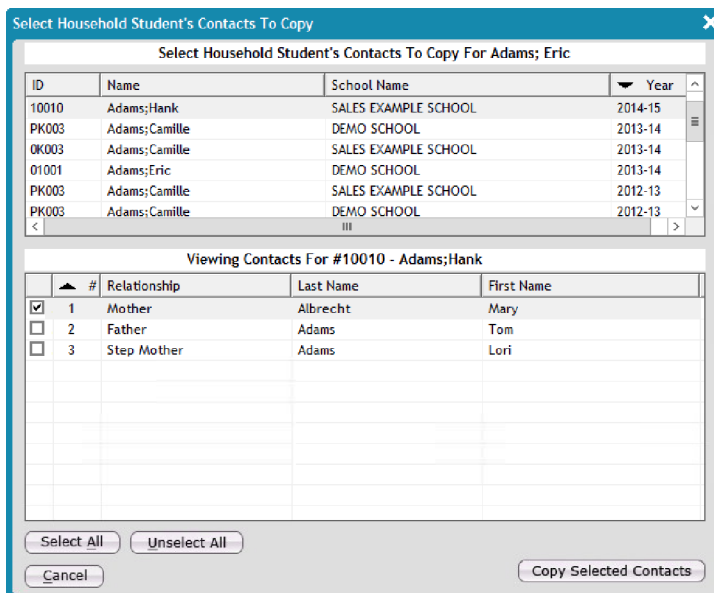


2. Select the **Copy contacts from** check box, click one of the four copy options (depending on where you want to copy contact information from), and click **Next [Alt+N]**.



Important: Skip step 3 if you clicked **Another Student With The Same Last Name**, **Another Student With Any Last Name**, or **All Contacts**.

3. Click a student at the top panel of the **Select Household Student's Contacts To Copy** dialog box, select the check box(es) next to the desired contact(s), click **Copy Selected Contacts**, and skip step 4.



ID	Name	School Name	Year
10010	Adams;Hank	SALES EXAMPLE SCHOOL	2014-15
PK003	Adams;Camille	DEMO SCHOOL	2013-14
OK003	Adams;Camille	SALES EXAMPLE SCHOOL	2013-14
01001	Adams;Eric	DEMO SCHOOL	2013-14
PK003	Adams;Camille	SALES EXAMPLE SCHOOL	2012-13
PK003	Adams;Camille	DEMO SCHOOL	2012-13

#	Relationship	Last Name	First Name
<input checked="" type="checkbox"/> 1	Mother	Albrecht	Mary
<input type="checkbox"/> 2	Father	Adams	Tom
<input type="checkbox"/> 3	Step Mother	Adams	Lori

- Click the desired contact, and click **Select [F10]**.

#	Contact Full Name	Contact Last Name	Contact First Name	Address Line 1
6	Bernie Baldwin	Baldwin	Bernie	
7	Briget Burke	Burke	Briget	
8	Christina Baker	Baker	Christina	
9	Desmond Burke	Burke	Desmond	
10	Desmond Lindsay	Lindsay	Desmond	
11	Dr. Burke	Burke		
12	Dr. Deborah Gurski	Gurski	Deborah	
13	Dr. Desmond E Burke III	Burke	Desmond	
14	Dr. Desmond Robert Burke	Burke	Desmond	

- Enter the proper contact information in the **Local Fields** section of the **Contacts: Edit Mode** dialog box.

Local Fields: Fields that are specific to the relationship between the student and the contact are considered local fields. For example, local fields define the relationship between the contact and the student, determine parent portal access and which reports should be sent to the contact, and they establish if the contact can pick up the child from school.

Contacts: View Mode
Dr. Mary Ann Albrecht
 (Mother of Adams, Eric)

Enter Student ID / Name: [Search]

Contact 3 of 3 [Previous] [Next] [Lookup [F11]]

Global Fields: Applies to this contact

Name: [Dr. Mary Ann Albrecht] [Override]

Salutation: [Dr.] [Other Names]

First Name: [Mary]

Middle Name: [Ann]

Last Name: [Albrecht]

Suffix: [] Language: [ENGLISH] [Settings]

Local Fields: (Applies to the relationship of this contact with Adams, Eric)

Relationship: [Mother] [New]

☐ Primary Contact

☐ Enable Parent Portal Access

Address [Copy From] [Other Addresses]

Street: [9 Watch Hill Road]

Line 1: []

Line 2: []

City: [Hampden]

State: [MA]

ZIP: [01055]

[Setup Address Layout]

Phone [Other Phones]

Home: [(413) 444-6207]

Mobile: [(413) 555-1717]

Office: [(413) 567-1290] Extn. [116]

User Defined Global Fields

Work: [Dr. Albrecht's Office]

Summer Home: [Falmouth, MA]

[Setup Global Fields] [Edit Global Fields]

E-Mail [Other E-Mails]

Primary: [ma.albrecht@mdgroup.org] []

Alternate: [] []

[Setup Local Fields] [Edit Local Fields]

Allow which reports for 'Adams, Eric' to be sent to or printed for this contact?

☒ Data Base ☒ Scheduling

☒ Attendance ☒ Discipline

☒ Report Cards ☒ Billing

User Defined Local Fields

Allow Pick Up: [Yes]

Custody: []

No Release: []

Court Orders: []


[Setup Local Fields] [Edit Local Fields]



[Exit [Esc]] [New [F2]] [Edit [F3]] [Delete [F8]] [Show All Fields [F9]] [Done [F10]]

- Click **Save [F10]**, and then click **Done [F10]**.


Add a Student to a Household

The contacts and students who live at the same address are called a household in AdminPlus. Multiple students and multiple contacts can be part of the same household. You can search for any student in the database, and add that student to an existing or new household, or move a student from one household to another.

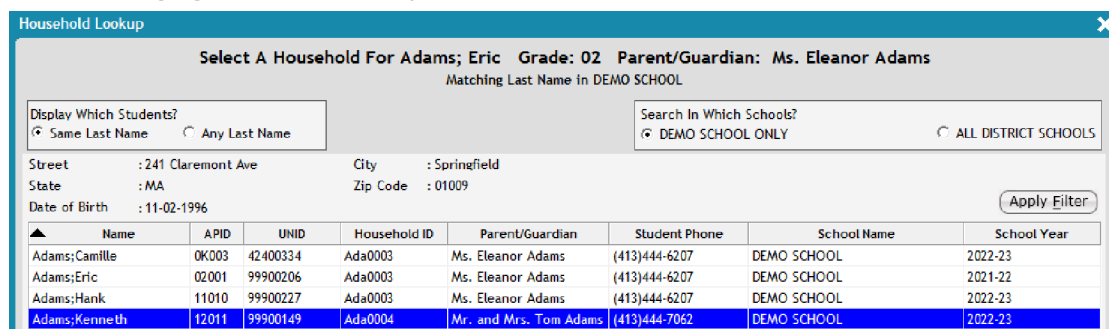
1. In **Data Base**, click **New Files**.
2. To search for a student, click , click a student, and click **Select**.

Tip: You can also search for a student by entering the student's ID or last name into the **Enter ID / Name** box, and pressing Enter. Click  and  to navigate through the list of students until you arrive at the student you're looking for.



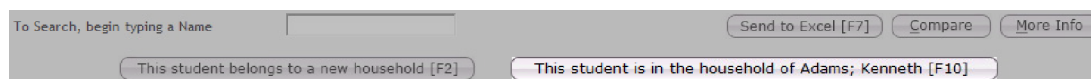
3. Click  next to the **Household ID** box.
4. Do one of the following:
 - Click **Same Last Name** if you want to add the selected student to a household associated with a student by the same last name.
 - Click **Any Last Name** if you want to add the selected student to any household in the database.
 - Click **This student belongs to a new household [F2]** at the bottom of the dialog box to create a new household for this student, and skip steps 5 and 6.
5. Click the desired student from the list. This student is the one who's in the target household that is to be associated with the student you selected in step 2.

The following figure illustrates steps 4 and 5.



Name	APID	UNID	Household ID	Parent/Guardian	Student Phone	School Name	School Year
Adams;Camille	0K003	42400334	Ada0003	Ms. Eleanor Adams	(413)444-6207	DEMO SCHOOL	2022-23
Adams;Eric	02001	99900206	Ada0003	Ms. Eleanor Adams	(413)444-6207	DEMO SCHOOL	2021-22
Adams;Hank	11010	99900227	Ada0003	Ms. Eleanor Adams	(413)444-6207	DEMO SCHOOL	2022-23
Adams;Kenneth	12011	99900149	Ada0004	Mr. and Mrs. Tom Adams	(413)444-7062	DEMO SCHOOL	2022-23

6. Click **This student is in the household of ... [F10]**.

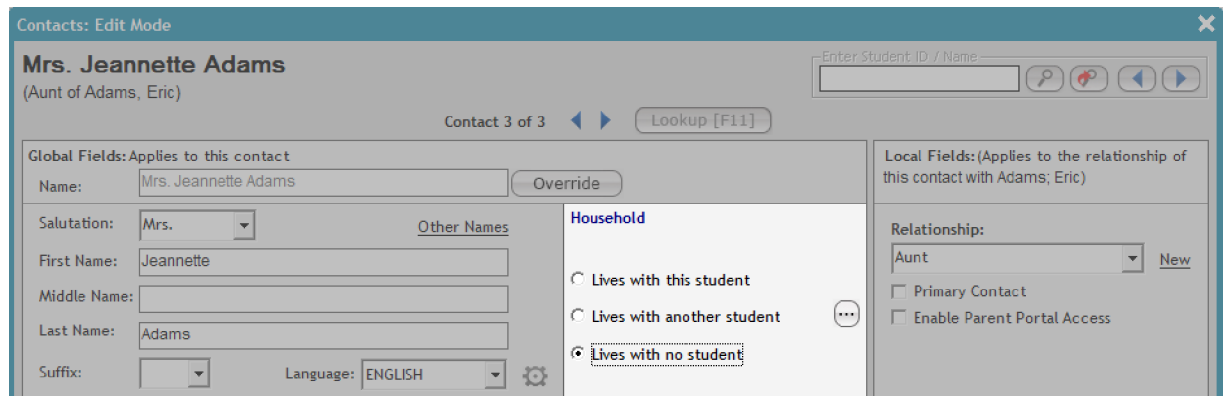


7. Click **Accept**, and then click **Done**.

Remove a Contact From a Household

Using the Household panel in the Contact Data Base, you can edit a student's household and remove a contact from a household, depending on circumstances during the year.

1. Click the contact's name in the student snapshot area.
2. Do either of the following:
 - Click **Lives with another student** if this contact lives with any other student, click the appropriate student who lives with this contact, and click **Select**.
 - Click **Lives with no student** if this contact doesn't live with a student.



Contacts: Edit Mode

Mrs. Jeannette Adams
(Aunt of Adams, Eric)

Enter Student ID / Name:

Contact 3 of 3

Global Fields: Applies to this contact

Name:

Salutation:

First Name:

Middle Name:

Last Name:

Suffix: Language:

Local Fields: (Applies to the relationship of this contact with Adams, Eric)

Relationship:

☐ Primary Contact

☐ Enable Parent Portal Access

Household

☐ Lives with this student

☐ Lives with another student

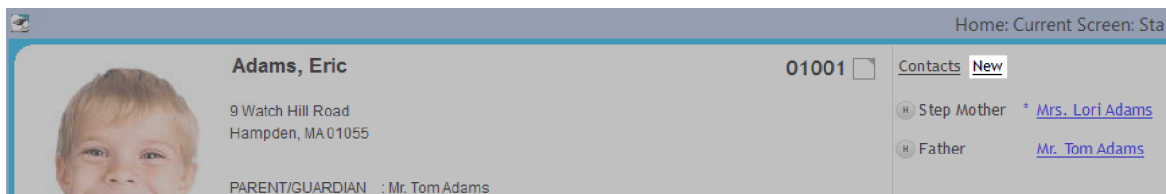
☒ **Lives with no student**

3. Click **Save [F10]**, and then click **Done [F10]**.

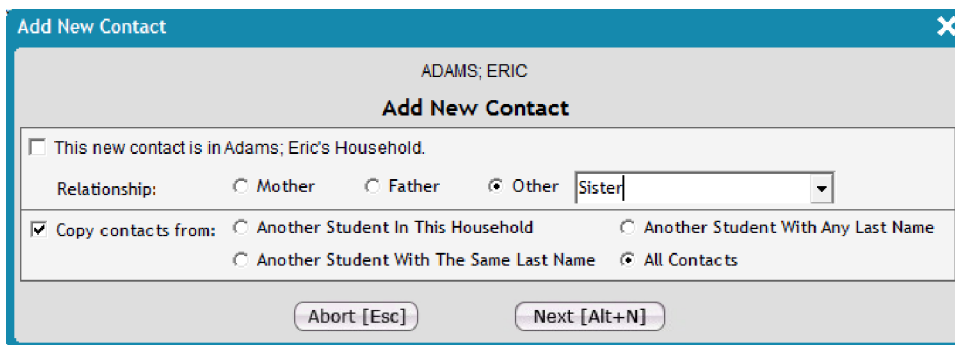
Link a Student to a Contact

Link a student to a contact who isn't in his or her household to ensure your contact is connected to the appropriate student. This feature is useful, for example, if a parent who lives outside of the student's household wants to receive report cards for his or her child. Selecting the **Report Cards** check box in the **Local Fields** area of the contact's information ensures that the parent will receive report cards. For more information on local fields, see "Customize Global and Local Fields" on page 22.

1. On the Demographics screen, click a student, and then click **New** in the student snapshot.

A screenshot of a software interface showing a student's demographic information. On the left is a small photo of a young boy. To the right of the photo, the text reads: "Adams, Eric", "9 Watch Hill Road", "Hampden, MA 01055", and "PARENT/GUARDIAN : Mr. Tom Adams". To the right of this information is a box containing "01001" and a small square icon. Further right are two tabs: "Contacts" and "New", with "New" being the active tab. Below the tabs are two links: "Step Mother" with a blue asterisk and "Mrs. Lori Adams", and "Father" with "Mr. Tom Adams". At the top right of the interface, it says "Home: Current Screen: Sta".

2. Select the **Copy contacts from** check box, and click **All Contacts**.
3. Do either of the following:
 - Click **Mother** or **Father**.
 - Click **Other**, and click the correct relationship from the **Other** drop-down list, or enter a new relationship in the **Other** drop-down list.
4. Click **Next [Alt+N]**.

A screenshot of a dialog box titled "Add New Contact" with a close button (X) in the top right corner. The dialog box has a header area with "ADAMS, ERIC" and "Add New Contact". Below this is a section with a checkbox "This new contact is in Adams, Eric's Household." which is unchecked. Underneath is a "Relationship:" label followed by three radio buttons: "Mother", "Father", and "Other". The "Other" radio button is selected. To the right of the "Other" radio button is a dropdown menu showing "Sister". Below the relationship section is a section labeled "Copy contacts from:" with a checked checkbox. To its right are four radio buttons: "Another Student In This Household", "Another Student With Any Last Name", "Another Student With The Same Last Name", and "All Contacts". The "All Contacts" radio button is selected. At the bottom of the dialog box are two buttons: "Abort [Esc]" and "Next [Alt+N]".

5. In the **Select Contact to Copy** dialog box, click the contact you want to link with the selected student, and click **Select**.
6. Click **Save [F10]**, and then click **Done [F10]**.

Export Contacts to Microsoft Excel

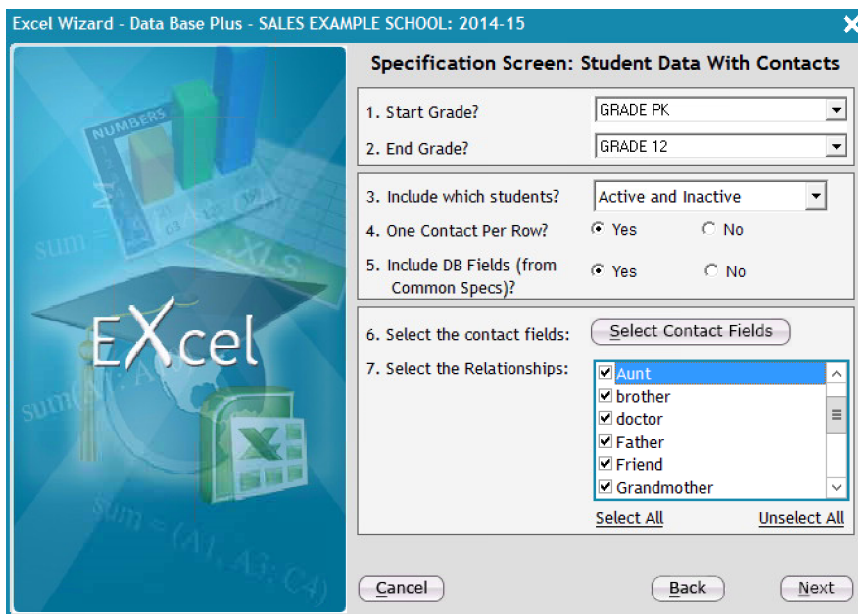
Using the Excel Wizard, you can export Contact Data Base information to Microsoft Excel® for either local or global fields. You can then either print the export directly from Excel or save it as a spreadsheet. This topic first shows you how to export local field information, followed by global field information.

Export Information from Local Fields

Local Fields: Fields that are specific to the relationship between the student and the contact are considered local fields. For example, local fields define the relationship between the contact and the student, determine parent portal access and which reports should be sent to the contact, and they establish if the contact can pick up the child from school.

1. In the **Tools** menu, click **Excel Wizard**.
2. With **1. Data Base Plus** selected on the left, click **Student Data with Contacts** on the right, and click **Next**.
3. In the **Excel Wizard** dialog box, click the **Start Grade** and the **End Grade** from the respective drop-down list.
4. Click **Active and Inactive**, **Active Only**, or **Inactive Only** from the **Include which students** drop-down list, depending on what type of students you want to be displayed.
5. Click **Yes** to display **One Contact Per Row**, or click **No** to have more than one contact per row, depending on how you want your information to be displayed.
6. Click **Yes** to **Include DB Fields**, or click **No** to exclude database fields.
7. Click **Select Contact Fields**.

The following figure illustrates steps 3–7.



Excel Wizard - Data Base Plus - SALES EXAMPLE SCHOOL: 2014-15

Specification Screen: Student Data With Contacts

1. Start Grade? GRADE PK

2. End Grade? GRADE 12

3. Include which students? Active and Inactive

4. One Contact Per Row? ☒ Yes ☐ No

5. Include DB Fields (from Common Specs)? ☒ Yes ☐ No



6. Select the contact fields: [Select Contact Fields](#)

7. Select the Relationships:

- ☒ Aunt
- ☒ brother
- ☒ doctor
- ☒ Father
- ☒ Friend
- ☒ Grandmother

[Select All](#) [Unselect All](#)

[Cancel](#) [Back](#) [Next](#)

8. In the **Available Fields** column, click a field to include in your spreadsheet, and click  to move the desired field to the **Selected Fields** column.
9. Optional: Click any undesired field in the **Selected Fields** column, and click  to remove the field from the printout.
10. Click **Save**.

The following diagram illustrates steps 8–10.

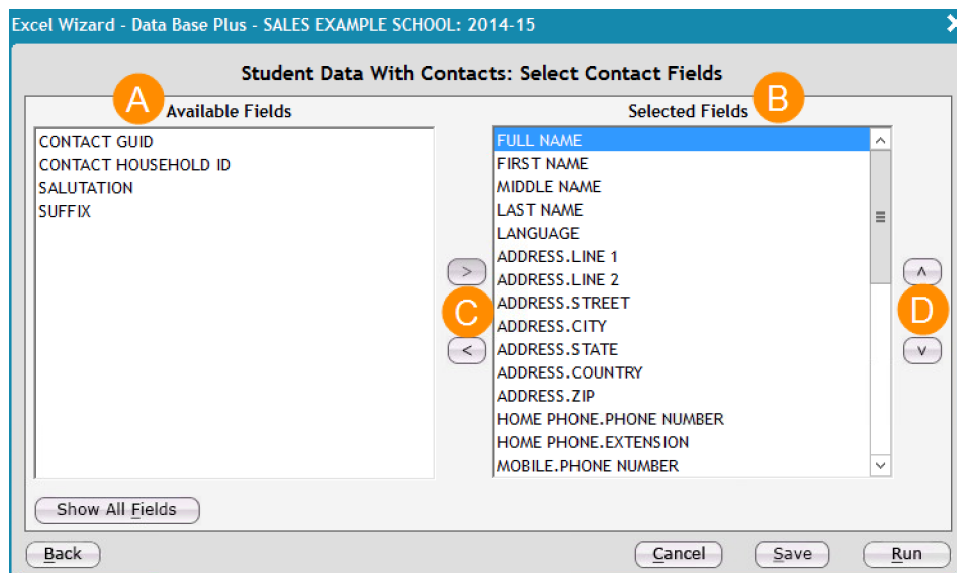


Diagram: Selecting Local Fields for Exporting to Excel

A

Select a field to include from the **Available Fields** area. Fields in this area not yet set to appear in the export. The fields must be transferred to the **Selected Fields** area to show up on the export.

B

Move fields between the **Available Fields** area and the **Selected Fields Area** using right and left arrow buttons.

C

Fields in the **Selected Fields** will appear in your Excel export.


D

Organize the order the fields will appear in your export by using the up and down arrow buttons.

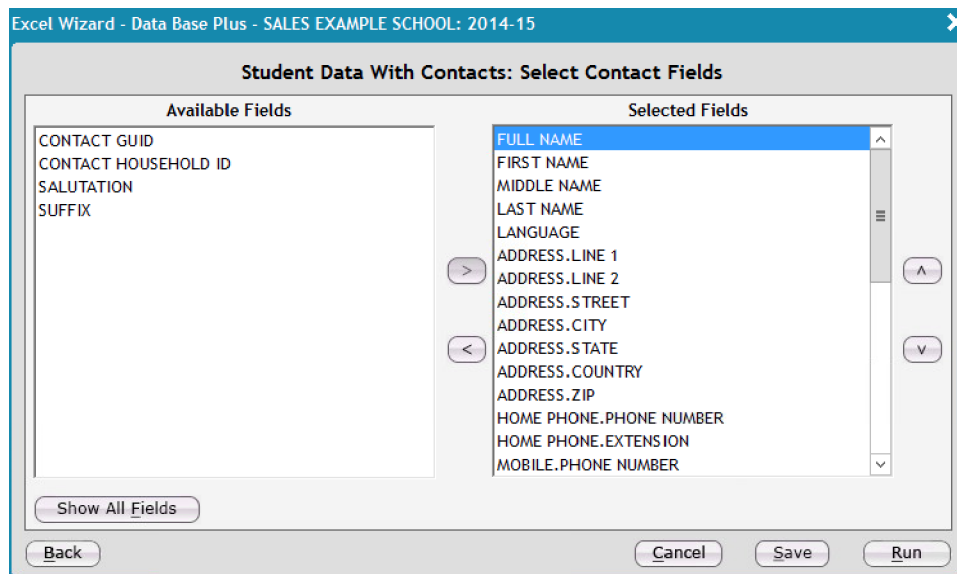
11. Select the check box(es) next to the relationships you want to display, and click **Next**.
Microsoft Excel® opens in a separate window, displaying the export information.

Export Information from Global Fields

Global Fields: Fields that contain the contact's name, address, phone number, and employer information (among other fields illustrated below) are considered global fields because they remain the same for the contact regardless of the student that the contact is connected to.

1. In the **Tools** menu, click **Excel Wizard**.
2. With **1. Data Base Plus** selected on the left, click **Master Contacts** on the right, and then click **Next**.
3. In the **Available Fields** column, click a field to include in your spreadsheet, and click  to move the desired field to the **Selected Fields** column.

The following figure illustrates steps 3–5.



4. Optional: Click any undesired field in the **Selected Fields** column, and click  to remove the field.
5. Click **Next**.

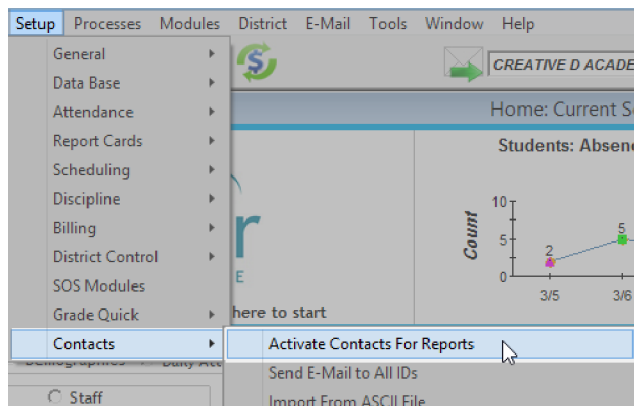
Microsoft Excel® opens in a separate window, showing the export information.

Print a Report with Contacts

The process of printing a report with contact information involves two major parts: mapping the Report Writer codes to the respective contact fields in your Data Base and choosing which contact information to include while generating the report. This feature is useful when you need to print reports for parents and/or guardians.

Map Report Writer Codes to Contact Fields

1. Do either of the following:
 - If contacts have not yet been activated for reports: Click **Setup > Contacts > Activate Contacts For Reports**.

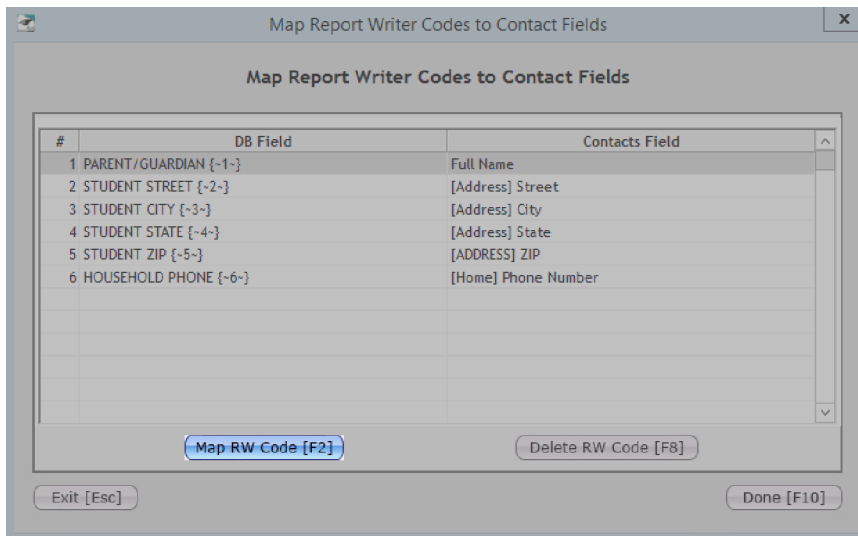


A warning appears (confirm it).



- If contacts have already been activated for reports: Click **Setup > Contacts > Map Report Writer Codes to Contact Fields**.
2. Double-click a **DB Field**, click the desired field from the **Select DB Field** dialog box, and click **Select**.
 3. Double-click a **Contacts Field**, click the desired field from the **Select Contacts Field** dialog box, and click **Select**.
 4. Repeat steps 2 and 3 as necessary to map additional existing fields.

- To add a new field, click **Map RW Code [F2]**, click the desired Data Base field, click **Select**, and then repeat step 3 to map the Data Base field to a Contact Data Base field.

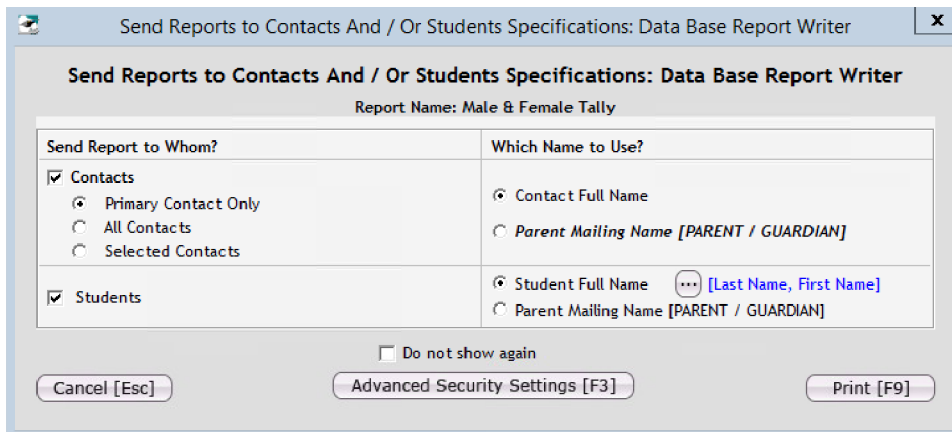


- Optional: To remove a field, click the field, click **Delete RW Code [F8]**, and confirm the warning.
- Click **Done [F10]**.

Print a Report with Contacts

Important: The following steps can be completed after selecting a Report Writer program and completing the proper specifications for that report.

- Complete all the prompts for your report, and generate the report.
The **Send Reports to Contacts And/Or Students Specifications** dialog box appears.



- Select the **Contacts** check box.

3. Do one of the following:

- Click **Primary Contact Only** to send this report to only the selected students' primary contact.
- Click **All Contacts** to send this report to all contacts associated with selected students who have rights to receive reports from the module the report is being run.
- Click **Selected Contacts** to send this report to specific contacts.

4. If you clicked **Selected Contacts** in step 3, click a **NOT USED** cell in the **Value** column, and enter the appropriate Value.

Send Reports to Contacts And / Or Students Specifications: Data Base Report Writer

Report Name: Male & Female Tally

Send Report to Whom?

☒ Contacts

☐ Primary Contact Only

☐ All Contacts

☒ Selected Contacts

Which Name to Use?

☒ Contact Full Name

☐ Parent Mailing Name [PARENT / GUARDIAN]

☒ Students

☐ Student Full Name [Last Name, First Name]

☐ Parent Mailing Name [PARENT / GUARDIAN]

Send reports to contacts matching **ALL** of the following:

#	Field	Criteria	Value
1	Relationship	equals	Mother
2	Primary	equals	NOT USED
3	Allow Pick Up	NOT USED	NOT USED
4	Custody	NOT USED	NOT USED
5	No Release	equals	Yes
6	Court Orders	NOT USED	NOT USED
7	Salutation	equals	Mrs.
8	Last Name	NOT USED	NOT USED
9	First Name	NOT USED	NOT USED
10	Middle Name	NOT USED	NOT USED

Select a criterion and a value to send report to contacts matching them. Leave the value field blank if you want to search for a blank field.

Do not show again

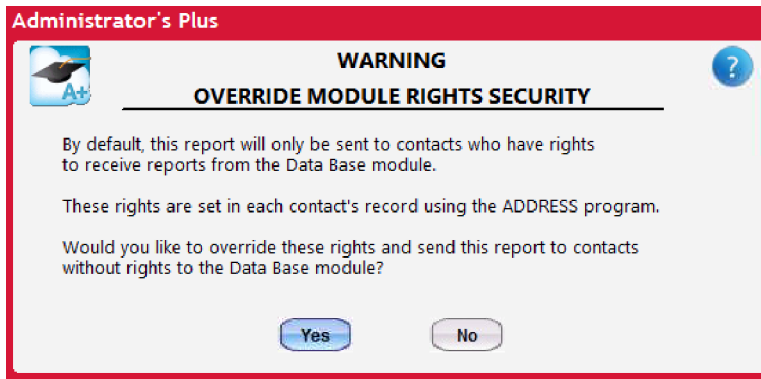
Cancel [Esc] Advanced Security Settings [F3] Print [F9]

Note: To change the criteria of a field, click a **NOT USED** cell in the **Criteria** column, and click the desired criteria from the drop-down list.

5. Click **Contact Full Name** or **Parent Mailing Name [PARENT/GUARDIAN]**.

Note: Clicking **Contact Full Name** retrieves information from the Contact Data Base. Clicking **Parent Mailing Name [PARENT/GUARDIAN]** retrieves information from a Data Base field.

6. Optional: To override the User Right you've set in the Contact Data Base and allow any contact to access this report, click **Advanced Security Settings [F3]**, click **Yes**, and then confirm the warning.



7. Click **Print [F9]**.

Tip: Select the check box **Do not show again** at the bottom of the **Send Reports to Contacts And/Or Students Specifications** dialog box to hide the box in the future. This option can save you time when running reports in the future if you're certain that it's highly likely you won't need to change whom the report is sent to. To enable the box once again: From the body of the report, click the dots next to **Show Sent to Window**, and then clear the check box you had previously selected.

CHAPTER 2

Customize Your Database

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Customize Global and Local Fields

You can create and customize two types of fields in the Contact Data Base: global fields and local fields. Fields you create are called User Defined fields. You can view your User Defined fields in the **User Defined Global Fields** panel and the **User Defined Local Fields** panel when you view an individual contact in the database, as shown in the following example.

Contacts: View Mode

Dr. Mary Ann Albrecht
(Mother of Adams, Eric)

Enter Student ID / Name:

Contact 3 of 3

Global Fields: Applies to this contact

Name:

Salutation:

First Name:

Middle Name:

Last Name:

Suffix: Language:

Local Fields: (Applies to the relationship of this contact with Adams, Eric)

Relationship:

☐ Primary Contact

☐ Enable Parent Portal Access

Address:

Street:

Line 1:

Line 2:

City:

State:

ZIP:

Phone:

Home:

Mobile:

Office: Extn.

User Defined Global Fields

Field	Value
Work	Dr. Albrecht's Office
Summer Home	Falmouth, MA

User Defined Local Fields

Field	Value
Allow Pick Up	Yes
Custody	
No Release	
Court Orders	

Global Fields: Fields that contain the contact's name, address, phone number, and employer information (among other fields illustrated below) are considered global fields because they remain the same for the contact regardless of the student that the contact is connected to.

Local Fields: Fields that are specific to the relationship between the student and the contact are considered local fields. For example, local fields define the relationship between the contact and the student, determine parent portal access and which reports should be sent to the contact, and they establish if the contact can pick up the child from school.

To create a User Defined Global or Local field, do the following:

1. On the Demographics screen, click a student, and click **Contacts** in the student snapshot at the top of the screen.

2. At the bottom of the screen, click **Setup [F12]**, and then click **Setup Global Fields** or **Setup Local Fields**.

3. Click **Add [F2]**.

4. Enter a field name in the **Field Name** column.

The following figure illustrates steps 4–11.

Setup Student Contacts Global Fields

LOCAL vs. GLOBAL fields: A single contact may be linked to multiple students. Local fields apply to the relationship of a contact with just one student. Example: The RELATIONSHIP field is a local field. This same contact may have "MOTHER" in the relationship field for one student and "AUNT" in the relationship field for another student. "PHONE NUMBER" is a global field. The contact's phone number is the same no matter which of their linked students you are looking at.

Field Name	Type	Length	Required	Case	Validation	Default Value
Employer Name	Text	35	Optional	Leave As Is	Not Validated	
EmployerStreet	Text	35	Optional	Leave As Is	Not Validated	
EmployerCityStateZip	Text	35	Optional	Leave As Is	Not Validated	
Employer Phone	Text	15	Optional	Leave As Is	Not Validated	
EmployerBusiness	Text	25	Optional	Leave As Is	Not Validated	

5. In the **Type** column, click **Text**, and click one of the following from the drop-down list:

- **Text:** Characters can be entered in any format.
- **Integer:** Whole numbers can be entered.
- **Decimal:** Numbers can be entered with a decimal point.
- **Date:** Dates can be entered in any format you've chosen.

6. In the **Length** column, enter the maximum character length for that field.

7. Click **Optional** in the **Required** column, and click **Optional** or **Mandatory** from the drop-down list.

Note: **Optional** fields can be left blank, whereas **Mandatory** fields require an entry in order to save the record.

8. Click **Leave As Is** in the **Case** column, and click one of the following from the drop-down list:

- **Leave as Is:** No formatting is applied to this entry.
- **Sentence Case:** The first word of the entry is capitalized, and the rest are left lower case.

- **Lower Case:** Entries are converted to lower case.
- **Upper Case:** Entries are converted to upper case.
- **Title Case:** The first letter of each word is capitalized.

9. Click **Not Validated** in the **Validation** column, and do one of the following:

- Click **Not Validated:** Validation in Contact Data Base means the field is to be a drop-down list from which you can select different values. If you choose not to validate it by clicking this option, information can be typed into the field based on the type you set in step 5.
- Click **Supervisor Only:** Only the SUPERVISOR user can define the values of the drop-down list. Any other user can then select the values from the list.
- Click **Anyone:** Any user with access rights to the Data Base module, regardless of their Contact DB rights, can both select items from the drop-down list *and* define additional list items.

Warning: Although this option offers great flexibility, without proper consistency in defining the list values, the list may become messy over time with several undesirable values. If you wish to create a drop-down list with consistent values that users can then choose from, set the this option to Supervisor so that your supervisor can define what the values should be.

Note: When you enable field validation, the field becomes a drop-down list for which you can define values. For example, if you create a User Defined field called "Alumni," you could then set it to be validated, and define the drop-list options to be "Yes" or "No" or to be based on a specific graduation year.

10. Skip this step and step 11 if you chose not to validate field in step 9. To add items to the validation drop-down list, click **Setup Validation** at the bottom, click **Add**, type field value, and then click **Accept**.
11. Repeat step 10 as necessary to add additional values to the list, and then click **Done** when finished.
12. Enter a value in the **Default Value** column if you want each entry of this field to be the same.

Note: Default Values may be changed after they have been entered by clicking **Edit Local Fields** or **Edit Global Fields** when editing contact information.

13. Click **Save [F10]**, and then click **Done [F10]**.
14. Repeat steps 4–12 to create additional fields.

Set Default Local Field Rights

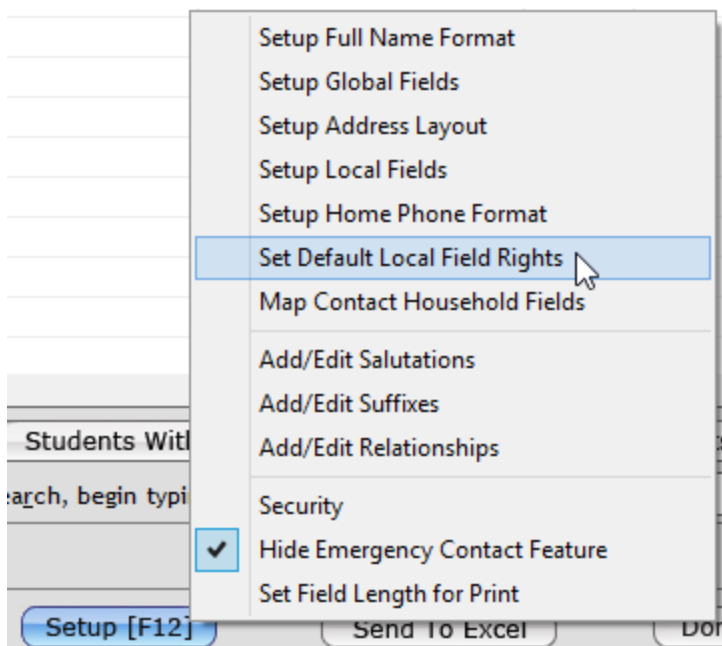
Set default local field rights based on contact type to control contacts' access to the parent portal, reports, and user-defined local fields across all contact records. Customizing the default rights helps your school maintain consistency across contact types as well as avoid errors, such as when a contact has or lacks the appropriate rights (for example, access to the parent portal). Remember that you can still customize these rights differently for certain users on a case-by-case basis if needed.

Example

By default, a school may wish to give every mother and father access to the parent portal as well as to attendance and report card reports. However, the school may also choose not to give these rights to additional contacts by default (such as to a sibling or grandparent).

To set default local field rights, do the following:

1. On the Demographics screen, click **Contacts** in the student snapshot.
2. At the bottom of the **Student Contacts** dialog box, click **Setup**, and then click **Set Default Local Field Rights**.



- Double-click a local field cell corresponding to a contact type, and then click **Yes** or **No** to control that contact type's access to the area. For example, if you click **Yes** for **Parent Portal** corresponding to the user type "Father," all father contact records going forward will have the check box **Enable Parent Portal Access** selected by default (found in the Local Fields area of the contact record). If the area is **AT Reports**, the check box **Attendance** will be selected by default, and all fathers added from then on will be able to receive attendance reports regarding his or her child.

Set Default Local Field Rights Based On Relationship						
Set Default Local Field Rights Based On Relationship						
#	Relationship	Parent Portal	DB Reports	AT Reports	RC Reports	SC Reports
1	Brother	No	No	Yes	No	No
2	Father	Yes	Yes	Yes	Yes	Yes
3	Mother	Yes No	Yes	Yes	Yes	Yes

- Click **Save** at the bottom, or press Enter to skip to the next column.
- Repeat steps 3 and 4 to customize all the necessary default local field rights.
- Do either of the following:
 - Click **Done** to apply the changes to all new contacts created going forward.
 - Click **Apply For Existing Contacts** to apply the changes to present and future contacts.

Warning: The **Apply For Existing Contacts** option overrides all local field selections you've made to present contacts. For example, if you've given the contact type "Father" default access to Attendance reports but you had previously not given access to certain fathers, the new default settings will override your previous customizations.

Edit Contact Data Base User Rights

Specify which default access rights you want to apply to all new users, or customize rights based on user type. Choose which users have complete access, read-only access, or no access at all to the Contact Data Base.

Set Default Rights for New Users

Select the access rights you want to apply to all new users going forward. Setting these default rights saves you time when you know there are certain rights you want to apply to all new users. Remember you still have the flexibility to further customize the rights based on the user type (explained later in this topic in the section Customize Rights for Existing Users Based on User Type).

To set default rights for new users, do the following:

1. On the Demographics screen, click a student, and click **Contacts** in the student snapshot at the top of the screen.



2. Click **Setup**, and then click **Security**.
3. Click **Set Default Rights**.
4. Do any of the following:
 - Select the **Create New Contact Fields** check box to allow new users to create contact fields.
 - Select the **Add Records** check box to allow new users to add records.
 - Select the **Delete Records** check box to allow new users to remove records.

The following figure illustrates steps 4 and 5.

<input checked="" type="checkbox"/> Create New Contact Fields <input type="checkbox"/> Add Records <input type="checkbox"/> Delete Records			
Field Name	Edit Rights		
	All	Read	No
Contact Name	✓		
Other Names	✓		
Address			✓
Phone Number			✓
E-Mail	✓		
Language	✓		
Relationship	✓		
Primary Contact	✓		
Report Rights	✓		
Enable Parent Portal Access		✓	
Global User Defined Fields		✓	
Local User Defined Fields		✓	

5. Click an access right next to a **Field Name**, and do one of the following:

- Click a cell in the **All** column to give all new users all rights.
- Click a cell in the **Read** column to give all new users read-only rights.
- Click a cell in the **No** column to restrict all new users.

6. Click **Done**.

Tip: To apply the rights to all current users, click **Apply to All Current Users**. **Caution:** Keep in mind that this option overrides any rights you may have customized for certain user types. For example, if you previously set specific rights for the office and/or principal user types, the rights will be overridden by the default rights you customized in steps 4 and 5.

Customize Rights for Existing Users Based on User Type

Specify access rights based on the type of user.

1. On the Demographics screen, click a student, and click **Contacts** in the student snapshot at the top of the screen.

2. Click **Setup**, and then click **Security**.

3. Double-click an access right next to a **User Name**, and do one of the following:

- Click **Y** from the drop-down list to give the user all rights.
- Click **N** from the drop-down list to restrict the user.
- Select the check box in the **Co-Owner** column to give a user all rights to the Contact Data Base.

#	User Name	Create New Contact Fields	Add Records	Delete Records	Co-Owner	PRINCIPAL	
1	PRINCIPAL	N	N	N	<input type="checkbox"/>	Field Name	Rights
2	OFFICE	N	N	N	<input type="checkbox"/>	Contact Name	N
3	VICE PRINCIPAL	Y	N	N	<input type="checkbox"/>	Other Names	N
4	PARENTS	N	N	N	<input type="checkbox"/>	Address	N
5	TEACHERS	N	N	N	<input type="checkbox"/>	Phone Number	N

4. Double-click an access right next to a **Field Name**, and do one of the following from the drop-down list:

- Click **Y** to give the user all rights.
 - Click **R** to give the use read-only rights.
 - Click **N** to restrict the user.
5. Click **Save [F10]**, and click **Done [F10]**.

Format Contact Names

Customize the appearance of your Contact Data Base by editing the format of all full names. You can apply your format changes to all past and future contacts, or you can apply the format changes just to future contacts. For example, you could format all full names to appear with a title, followed by a last name, and then a first name, such as Mrs. Adams Eleanor.




1. On the Demographics screen, click a student, and click **Contacts** in the student snapshot at the top of the screen.



2. Click **Setup [F12]**, and then click **Setup Full Name Format**.
3. Click a field in the **Available Fields** box, and click **>** to move the field to the **Selected Fields** box.

A screenshot of a dialog box titled 'Setup Student Contact Fields and Screen Layout'. Inside the dialog, there is a section titled 'Setup Student Contacts Full Name Format'. This section contains two boxes: 'Available Fields' and 'Selected Fields'. The 'Available Fields' box lists 'Salutation (e.g.: Mr.)', 'Middle Name (e.g.: Michael)', and 'Suffix (e.g.: Jr.)'. The 'Selected Fields' box lists 'First Name (e.g.: Sam)' and 'Last Name (e.g.: Adams)'. Between these boxes are arrows for moving fields. Below the boxes is a 'Sample of how Full Name will be displayed:' field showing 'Sam Adams'. Underneath is a 'Select Case Rule for Entering Names:' dropdown menu set to 'As Entered'. At the bottom of the dialog, there are three buttons: 'Exit [Esc]', 'Change Name of Existing Contacts [F5]', and 'Done [F10]'. A note at the bottom of the dialog states: 'FYI: Changing the format of the full name will not change the full name of the existing contacts. You may click the 'Change Name of Existing Contacts [F5]' button below to change them.'

Note: The fields in the **Selected Fields** box are displayed in your Contact Data Base in the corresponding order.

4. Optional: Click a field in the **Selected Fields** box, and click  to remove the field from your Contact Data Base format.
5. Optional: Click a field in the **Selected Fields** box, and click  or  to move the field into your desired position.

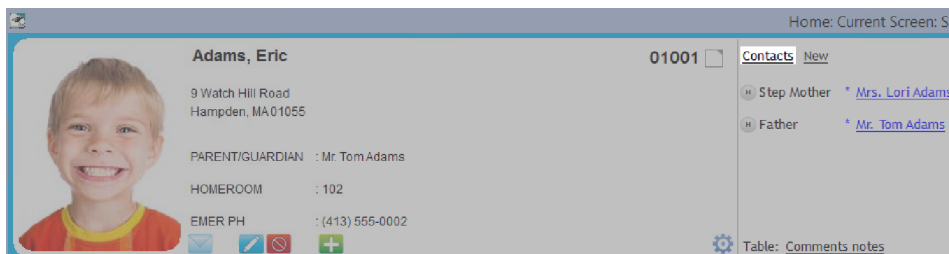
Note: Your information is displayed in the same order as it is in the **Sample of how Full Name will be displayed** box.



6. Repeat steps 3–5 for any applicable fields.
7. Do one of the following:
 - Click **As Entered** in the **Select Case Rule for Entering Names** drop-down list to keep the name in the same format as it was entered.
 - Click **Title Case** in the **Select Case Rule for Entering Names** drop-down list to capitalize each first letter in the name.
 - Click **Upper Case** in the **Select Case Rule for Entering Names** drop-down list to capitalize every letter in the name.
8. Do either of the following:
 - Click **Change Name of Existing Contacts [F5]** to apply your changes to all existing and future contacts.
 - Click **Done [F10]** to apply your changes to only future contacts.

Set up Contact Address Fields

Choose which types of address fields are to be used for the database entries of all contacts.

1. On the Demographics screen, click a student, and click **Contacts** in the student snapshot at the top of the screen.



2. Click **Setup [F12]**, and then click **Setup Address Layout**.
3. Select the check box(es) next to the fields you want to include in your Contact Data Base.
4. Enter a **Default Field Value** in the appropriate text box to display the information by default when a new contact is created.
5. Click a field, and then click  or  to display the fields in the order you choose.
6. Click **Done [F10]**.

The following figure illustrates steps 3–6.

A screenshot of a dialog box titled 'Setup Student Contacts Address Fields'. The dialog box has a close button (X) in the top right corner. Inside, there is a section titled 'Select Fields for Address List' with two columns: 'Select fields' and 'Enter/Edit Default Field Values'. The 'Select fields' column has checkboxes for 'Street', 'Line 1', 'Line 2', 'City', 'State', 'Zip', 'Country', and 'Select All'. The 'Enter/Edit Default Field Values' column has corresponding text boxes. The 'State' box contains 'MA'. To the right of the text boxes are two arrow buttons (up and down). At the bottom of the dialog box are two buttons: 'Exit [Esc]' and 'Done [F10]'.

Select fields	Enter/Edit Default Field Values
<input checked="" type="checkbox"/> Street	<input type="text"/>
<input type="checkbox"/> Line 1	<input type="text"/>
<input type="checkbox"/> Line 2	<input type="text"/>
<input checked="" type="checkbox"/> City	<input type="text"/>
<input checked="" type="checkbox"/> State	<input type="text" value="MA"/>
<input checked="" type="checkbox"/> Zip	<input type="text"/>
<input type="checkbox"/> Country	<input type="text"/>
<input type="checkbox"/> Select All	

Map Household Fields

After you've entered information in the Contact Data Base, data displays in the AdminPlus Data Base if the household fields are mapped accurately. Mapping the fields ensures that household contact fields and student fields are always the same. For example, you could map the **Line 2** Contact Data Base field to the **Apartment Number** Data Base field so that the information is the same both in the Contact Database and on the Demographics screen of the Data Base module.

1. On the Demographics screen, click a student, and click **Contacts** in the student snapshot at the top of the screen.



2. Click **Setup [F12]**, and then click **Map Contact Household Fields**.
3. Click an empty cell in the **Data Base Field** column, and click .

A dialog box titled 'Map Contact Household Fields To DB Fields' with a close button (X) in the top right corner. Inside the dialog is a table with two columns: '#', 'Contact Household Field', and 'Data Base Field'. The table has 8 rows. Row 1: #1, STREET, STUDENT STREET. Row 2: #2, LINE 1, (empty). Row 3: #3, LINE 2, (empty) with a more options icon (three dots) to its right. Row 4: #4, CITY, STUDENT CITY. Row 5: #5, STATE, STUDENT STATE. Row 6: #6, ZIP, STUDENT ZIP. Row 7: #7, COUNTRY, (empty). Row 8: #8, HOME PHONE, HOUSEHOLD PHONE. At the bottom of the dialog are two buttons: 'Exit [Esc]' and 'Done [F10]'.

#	Contact Household Field	Data Base Field
1	STREET	STUDENT STREET
2	LINE 1	
3	LINE 2	...
4	CITY	STUDENT CITY
5	STATE	STUDENT STATE
6	ZIP	STUDENT ZIP
7	COUNTRY	
8	HOME PHONE	HOUSEHOLD PHONE

4. Click the desired Data Base field, click **Select**, and then repeat steps 3 and 4 for all necessary fields.
5. Click **Done [F10]**.



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