



AdminPlus Database Guide

LEARN OUR SOFTWARE STEP BY STEP

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Introduction

The [Data Base module](#) of AdminPlus is a powerful student information system database that seamlessly integrates all modules in the Administrator's Plus student information system.

The database's flexibility, ease of use, 100% customizable report writers, and unsurpassed features make it ideal for public and private schools of all sizes.

Our online articles will get you started on some of the main tasks you'll perform in the Data Base module. When developing these articles, we conducted a research study of our support tickets and documentation analytics to discover which tasks our users find the most important. The result is a collection of handpicked topics that will help make your day as productive as possible with AdminPlus Data Base.

CHAPTER 1

Customize Information

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1.1 Add a Student or Staff Member

Before you can customize and manage information about students and staff members, you must first add them to the database.

Add a Student

1. On the AdminPlus toolbar, click **New > Student > Manual Entry**.
2. Click the student's grade level, and then click **Select**.
3. In the **Add or Edit Names for Student or Staff** dialog box, and then do the following:
 - Enter the student's **Last Name** and **First Name**.

Last Name	<input type="text" value="Adams"/>
First Name	<input type="text" value="Camille"/>
Middle Name	<input type="text"/>
Abbreviated Name	<input type="text"/>

Note: The **Middle Name** field is optional.

- Verify that the following are correct:
 - **Entry Date:** the date the student enters the school
 - **Entry Code:** the way the student enters the school
 - **Language**

Grade	<input type="text" value="2"/>	Entry Date	<input type="text" value="2017-09-07"/>
Record#	<input type="text" value="29"/>	Entry Code	<input type="text" value="E1 - Transfer"/>
Unique ID#	<input type="text"/>	With Date	<input type="text"/>
Household ID	<input type="text"/>	With Code	<input type="text"/>
Calendar	<input type="text" value="MASTER SCHOOL CALENDAR"/>	Language	<input type="text" value="ENGLISH"/>

- Click **Next [F10]**.

4. In the **Household Lookup** dialog box, do one of the following:
 - Click an existing student record to connect to another student at the same address, and then click **This student is in the household of [Student Name] [F10]**.

Note: By default, existing students with the same last name are displayed. To connect to an existing student with a different last name, click **Any Last Name** for **Display Which Students**.

- Click **This student belongs to a new household [F2]** to assign a new Household ID.

Household Lookup

Select A Household For Adams; Matthew Grade: 10
Matching Last Name in SCHOOL OF ROCK

Display Which Students?
☒ Same Last Name ☐ Any Last Name

Search In Which Schools?
☒ SCHOOL OF ROCK ONLY ☐ ALL DISTRICT SCHOOLS

Street : 9 Watch Hill Road City : Hamden
 State : MA Zip Code : 01055
 Date of Birth : 2008-03-07 Apply Filter

Name	APID	UNID	Household ID	Parent/Guardian	Student Phone	School Name	School Year
Adams;Camille	0K003	42400334	Ada0001	Ms. Eleanor Adams	(413) 444-6207	SCHOOL OF ROCK	2016-17
Adams;Eric	01001	99900206	Ada0001	Ms. Eleanor Adams	(413) 444-6207	SCHOOL OF ROCK	2017-18
Adams;Hank	10010	99900227	Ada0001	Ms. Eleanor Adams	(413) 444-6207	SCHOOL OF ROCK	2017-18
Adams;Kenneth	11011	99900149	Ada0002	Mr. and Mrs. Tom Adams	(413) 444-6207	SCHOOL OF ROCK	2017-18

Displaying 4 of 4 Student(s)

To Search, begin typing a Name

Send to Excel [F7] Compare More Info

This student belongs to a new household [F2]
 This student is in the household of Adams; Camille [F10]

5. If there's a scheduling year set in AdminPlus, the **Adding: [Student Name]** dialog box appears, prompting you to add the student to the scheduling year as well as the active year. To do this, click option 1 **Add this member**, and then click **Next**.

Administrator's Plus

Adding: Biondi; Jason

To Scheduling Year: 2018-19

ENTRY DATE: YEAR START APID : 02030
 ENTRY CODE: E1 UNIQUE ID: 99912924

☒ 1. Add this member
☐ 2. Change entry date
☐ 3. Change entry code
☐ 4. Do not add this member

Quit Previous Next

The **Information** message appears to confirm that the student has been added to both the active year and the scheduling year. The new Household ID that's been assigned to the student is listed in the message. Click **Done** to continue.

- If you've placed the student in the household of a student with a different last name, the **Select Household Students' Contacts to Copy** dialog box appears. Select the check boxes for all contacts you want to copy to the student, and then click **Copy Selected Contacts**.

Select Household Student's Contacts To Copy

Select Household Student's Contacts To Copy For #07003 - Kesser;Miles

ID	Name	School Name	Year
0K003	Adams;Camille	SCHOOL OF ROCK	2016-17
01001	Adams;Eric	SCHOOL OF ROCK	2017-18
02001	Adams;Eric	SCHOOL OF ROCK	2016-17
11010	Adams;Hank	SCHOOL OF ROCK	2016-17
10010	Adams;Hank	SCHOOL OF ROCK	2017-18

Viewing Contacts For #0K003 - Adams;Camille

	#	Relationship	Last Name	First Name
<input checked="" type="checkbox"/>	1	Mother	Adams	Lesley
<input checked="" type="checkbox"/>	2	Father	Adams	Jonathan
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Select All Unselect All *Household contacts are added by default and cannot be unselected.

Cancel Copy Selected Contacts

- In the **Adding: [Student Name]** dialog box, click option 2 **Enter demographics now for this student**, and then click **Next**.

Administrator's Plus

Adding: Nappi; Dana

☐ 1. Add another student
☒ 2. Enter demographics now for this student
☐ 3. Quit

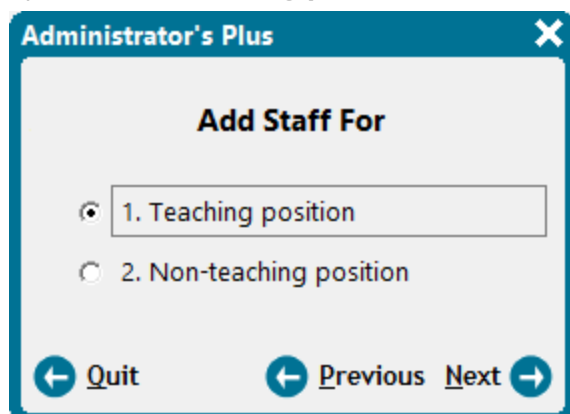
Quit Previous Next

You're redirected to the Demographics screen to customize the student's demographic information.

Add a Staff Member

1. On the AdminPlus toolbar, click **New > Staff**.

If your school specifies whether a staff member is teaching or non-teaching and has enabled this distinction in AdminPlus, the **Add Staff For** dialog box appears. Click option 1 **Teaching position** or option 2 **Non-teaching position**.



Note: To enable the teaching vs. non-teaching distinction, go to **Data Base > New Files > Specs.** [Alt + S]. Then, on the **Page 2** tab of the **Specifications: New Files** dialog box, click **Yes** for **Use Staff IDs 301 to 600**.

2. In the **Add or Edit Names for Student or Staff** dialog box, do the following:

- Enter the staff member's **Last Name** and **First Name**.



Note: The **Middle Name** field is optional.

- Verify that the following are correct:
 - **Entry Date** (the date the staff member enters the school)
 - **Entry Code** (the way the staff member enters the school)
 - **Language**

Grade	STAFF	Entry Date	09-07-2017
Record#	38	Entry Code	E1 - Transfer
Unique ID#		With Date	
Household ID		With Code	
Calendar	MASTER SCHOOL CALENDAR	Language	ENGLISH

- Click **Next** [F10].
3. In the **Adding: [Staff Member Name]** dialog box, click option 2 **Enter demographics now for this staff**, and then click **Next**.

Administrator's Plus ✕

Adding: Bachelder, May

☐ 1. Add another staff
☒ 2. Enter demographics now for this staff
☐ 3. Quit

⬅ Quit
⬅ Previous
Next ➡


You're redirected to the Demographics screen to customize the staff member's demographics.

1.2 Edit a Student's or Staff Member's Name





There are times when you may need to edit a student or staff member's name. Through the **Lookup** screen, you can quickly edit any student or staff member name when necessary.

1. On the **Lookup** screen, do one of the following:
 - Click **Students**.
 - Click **Staff**.
2. Enter a student's or staff member's name in the search text box to navigate to a profile.

Home: Current Screen: Standard






Bell, Theodore
122 Chaplin Mills Road
Longmeadow, MA 01055

PARENT/GUARDIAN : Mr. and Mrs. Rocky Bell
STUDENT CELL : (413)555-0019
BUS : 15
   


☒ Lookup ☐ Demographics ☐ Daily Att ☐ Period Att ☐ Grades ☐ Schedules

☒ Students ☐ Staff

Name: ☐ Begins With ☒ Contains [364 / 364]

	(All)	(All)		(All)	(All)
#	APID	Name	Grade	STUDENT STREET	
19	09027	Bean, Donald	09	415 Tenney Hill	
20	0K001	Bebe, Mark	OK	7 Lighthouse Road	
21	07001	Bell, Theodore	07	122 Chaplin Mills Road	
22	0K004	Bemis, Bridgett	OK	54 St. Jon Ave	

3. Click a name to highlight the demographic information and to show the student's profile.
4. Click .

5. In the **Add or Edit Names for Student or Staff** dialog box, click the **First Name** text box or the **Last Name** text box to edit the name.

Dialog box showing name fields:

Last Name	Bell
First Name	Theodore
Middle Name	
Abbreviated Name	Bell;T

Search bar: Enter ID / Name

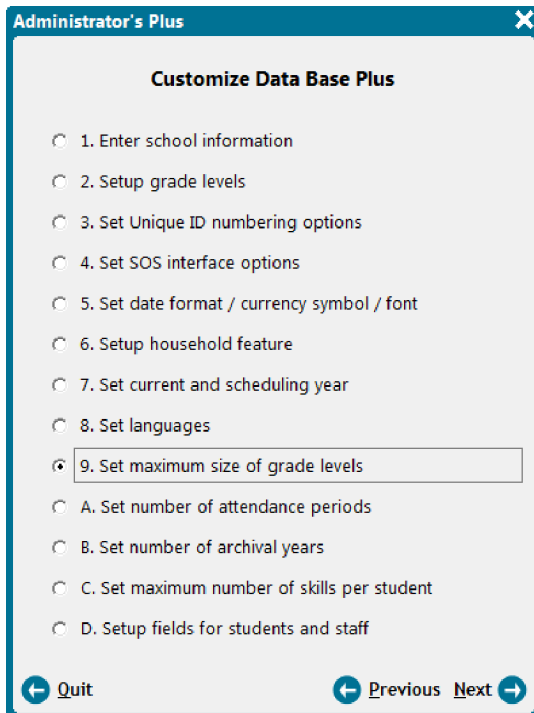
Buttons: Other [F9], Accept

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

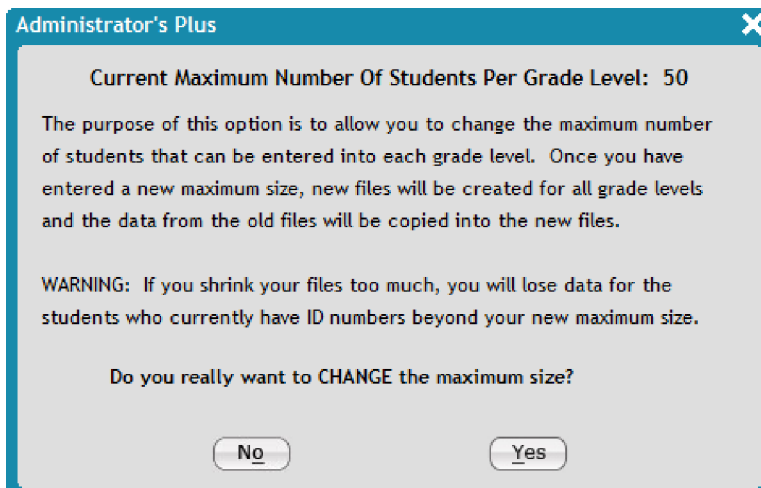
1.3 Edit the Size of a Grade Level

During your school year, when students transfer and enter into the school system, you might need to increase the size of your grade levels. By editing the size of a grade level, you can enter more students into AdminPlus.

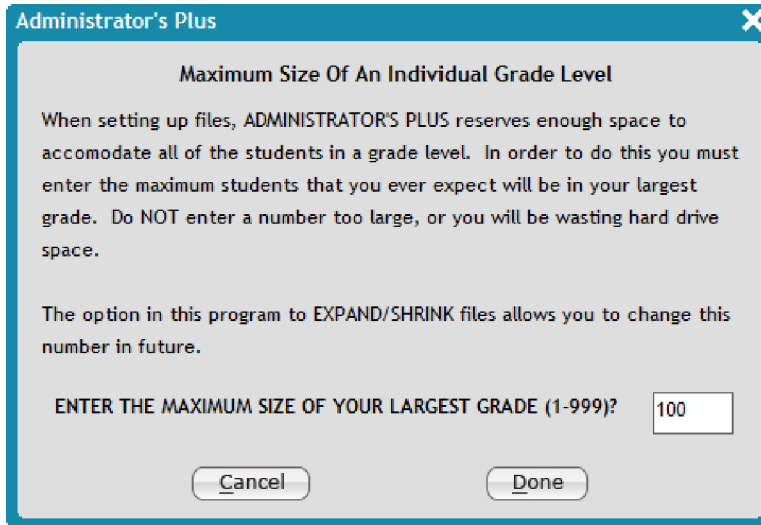
1. In **Data Base**, click **Cust DB**.
2. Click **9. Set maximum size of grade levels**, and click **Next**.



3. Click **Yes**.



4. Enter the new grade level size in the **Enter the Maximum Size of Your Largest Grade (1-999)** text box, and click **Done**.



The image shows a dialog box titled "Administrator's Plus" with a close button (X) in the top right corner. The main title inside the dialog is "Maximum Size Of An Individual Grade Level". Below this, there is a paragraph of text: "When setting up files, ADMINISTRATOR'S PLUS reserves enough space to accomodate all of the students in a grade level. In order to do this you must enter the maximum students that you ever expect will be in your largest grade. Do NOT enter a number too large, or you will be wasting hard drive space." Another paragraph follows: "The option in this program to EXPAND/SHRINK files allows you to change this number in future." Below the text, there is a label "ENTER THE MAXIMUM SIZE OF YOUR LARGEST GRADE (1-999)?" and a text input field containing the number "100". At the bottom of the dialog, there are two buttons: "Cancel" and "Done".

Administrator's Plus

Maximum Size Of An Individual Grade Level

When setting up files, ADMINISTRATOR'S PLUS reserves enough space to accomodate all of the students in a grade level. In order to do this you must enter the maximum students that you ever expect will be in your largest grade. Do NOT enter a number too large, or you will be wasting hard drive space.

The option in this program to EXPAND/SHRINK files allows you to change this number in future.

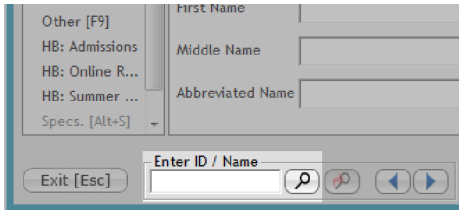
ENTER THE MAXIMUM SIZE OF YOUR LARGEST GRADE (1-999)?

Note: Only increase the maximum size of your grade to what is necessary. For example, if you have 10 students entering, increase the grade size by 10. If you increase the grade size to a number much greater than what is necessary, you could experience a slow network connection.

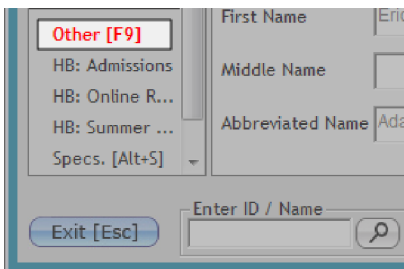
1.4 Move a Student to a New Grade Level

If, for any reason, a student needs to be moved to a new grade level, you can quickly adjust the grade level using the **Advanced Lookup**.

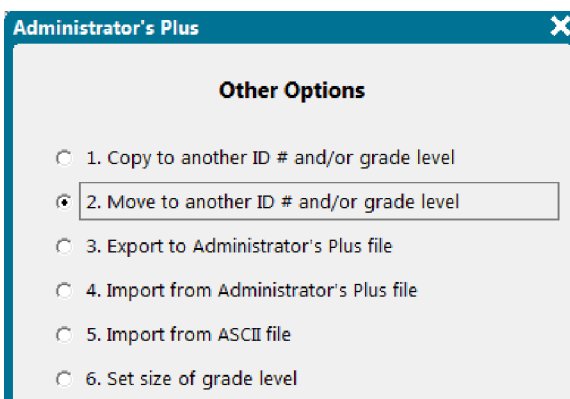
1. In **Data Base**, click **New Files**.
2. Click (🔍) to look up a student.



3. In the **Advanced Lookup** dialog box, click the student you want to move to a new grade level, and click **Select**.
4. In the **Add or Edit Names for Student or Staff** dialog box, click **Other [F9]** in the leftmost panel.



5. In the **Other Options** dialog box, click **2. Move to another ID # and/or grade level**, and click **Next**.



6. Click the grade you want to move the student to, and click **Next**.
7. In the **Add or Edit Names for Student or Staff** dialog box, click **Done**.

1.5 Move Students to Another School

When students move from a lower school to an upper school to continue their education, their information needs to be transferred from one school to the next. This is a two-step process: The first part involves performing an Administrator's Plus export of the highest grade level in the lower school. The second part involves importing the desired grade into the upper school.

Export from the Highest Grade Level in the Lower School

Note: Do this while logged in to the current school year (the school year that has just been completed).

Warning: Before you begin, you must create a backup of the directory into which you will be importing students.

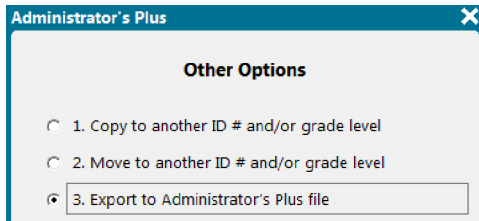
1. In **Data Base**, click **New Files**.
2. Click the highest grade level from the **Grade** drop-down list.

The screenshot shows a window titled "Add or Edit Names for Student or Staff". On the left is a menu with options: Add [F2], Edit [F3], Inactivate [F8], Delete, Entry Date [F3], Entry Code [...], Unique ID# [...], Household I..., and Check For R... On the right, there are several fields: "Grade" is a dropdown menu currently showing "12"; "Record#" is a list box showing numbers 6 through 12, with "12" selected; "Unique ID#" is a text field; "Household ID" is a text field showing "12"; and "Calendar" is a dropdown menu showing "STAFF".

3. Click **Other [F9]**.

The screenshot shows a window titled "Other [F9]". On the left is a menu with options: Other [F9], HB: Admissions, HB: Online R..., HB: Summer ..., and Specs. [Alt+S]. On the right, there are three text fields: "First Name", "Middle Name", and "Abbreviated Name", all of which are empty. At the bottom, there is a section labeled "Enter ID / Name" with a text field and three buttons: a magnifying glass, a red X, and a blue arrow.

4. Click **Export to Administrator's Plus file**, and click **Next**.



5. Browse your computer for the file path of where you want to send the Administrator's Plus export file.

Note: By default, this reads C:\ADMIN.ASC.

6. Click **Done**.

Import into the Lowest Grade Level of the Upper School

For the second part of this process, perform an Administrator's Plus import into the lowest grade level of the upper school.

Note: Do this while logged in to the new school year.

1. In **Data Base**, click **New Files**.
2. Click the lowest grade level from the **Grade** drop-down list.
3. Click **Other [F9]**.
4. Click **Import to Administrator's Plus file**, and click **Next**.
5. Browse your computer for the file path that you previously set.
6. Click **Done**.

A warning appears.

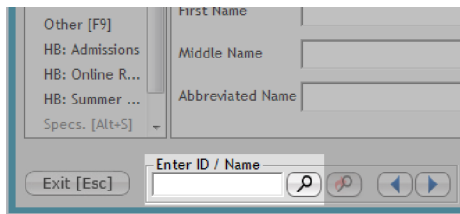
7. Choose whether or not to import inactive students.
8. Choose whether or not to preserve Administrator's Plus ID numbers.

Tip: We recommend that customers choose not to preserve Administrator's Plus ID numbers.


1.6 Disconnect Students from One Another

Sometimes, you may need to disconnect students from one another for various reasons. You might notice that some students who are not part of the same household become assigned to the same household ID. For example, this can happen if students have the same last name and are mistakenly assigned to the same household. You may also need to disconnect students if you have students who are related but live in different households. Moving a student from a household is a quick and effective way to disconnect the students and establish a separate household.

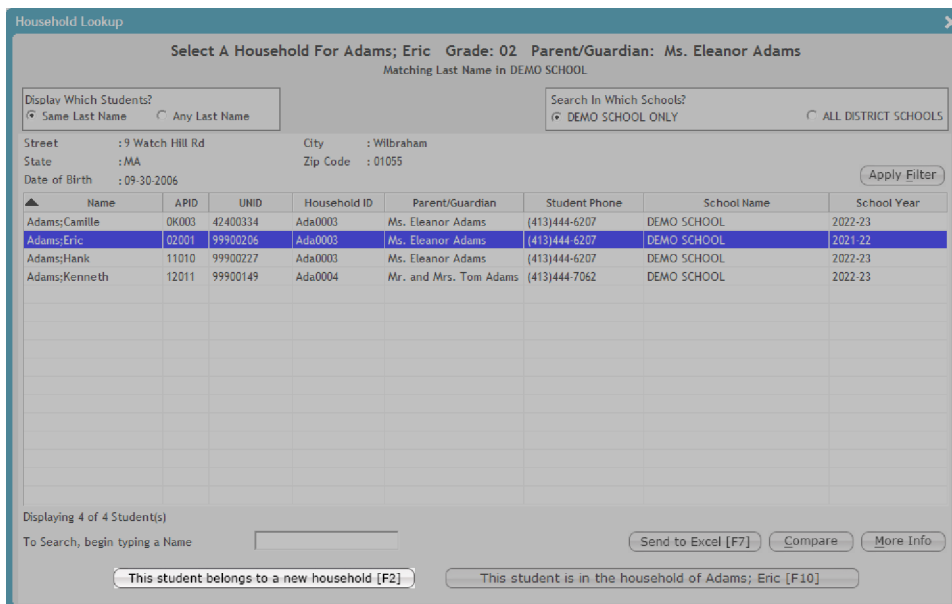
1. In **Data Base**, click **New Files**.
2. In the **Add or Edit Names for Student or Staff** dialog box, click  to navigate to a student.



The dialog box shows fields for First Name, Middle Name, and Abbreviated Name. On the left is a list of categories: Other [F9], HB: Admissions, HB: Online R..., HB: Summer ..., and Specs. [Alt+S]. At the bottom, there is an 'Enter ID / Name' field with a magnifying glass icon and navigation buttons (back, forward, and a central button).

3. In the **Advanced Lookup** dialog box, click the student you want to disconnect from the other student (s), and click **Select**.
4. Click  next to the **Household ID** field.

The **Household Lookup** dialog box appears, listing all students associated with the household of the student you've looked up. However, the student you've looked up (that is, the student you're working with) doesn't appear in this list. To disconnect this student, you must assign the student to a new household, explained in the next step.



The dialog box is titled 'Household Lookup' and 'Select A Household For Adams; Eric Grade: 02 Parent/Guardian: Ms. Eleanor Adams'. It includes search filters for 'Display Which Students?' (Same Last Name, Any Last Name) and 'Search In Which Schools?' (DEMO SCHOOL ONLY, ALL DISTRICT SCHOOLS). It shows address information (9 Watch Hill Rd, Wilbraham, MA 01055) and a table of students.

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

At the bottom, it says 'Displaying 4 of 4 Student(s)' and 'To Search, begin typing a Name'. There are buttons for 'Send to Excel [F7]', 'Compare', and 'More Info'. Two status bars at the very bottom indicate: 'This student belongs to a new household [F2]' and 'This student is in the household of Adams; Eric [F10]'.

5. Click **This student belongs to a new household [F2]** to assign a new Household ID to the student and automatically disconnect him or her from the previous household.


The **Household Lookup** dialog box closes, and a new Household ID is assigned to the student in the **Household ID** field.

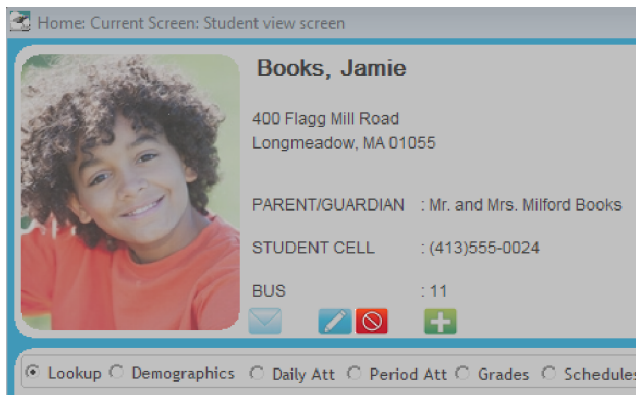
6. Click **Accept**, and then click **Done**.

1.7 Inactivate, Reactivate, or Delete a Student

During the school year, there might be times when you need to inactivate, reactivate, or delete a student from your AdminPlus Data Base. You can inactivate or reactivate a student at any time, but you can only delete a student if they don't have any outstanding invoices in the Billing module.

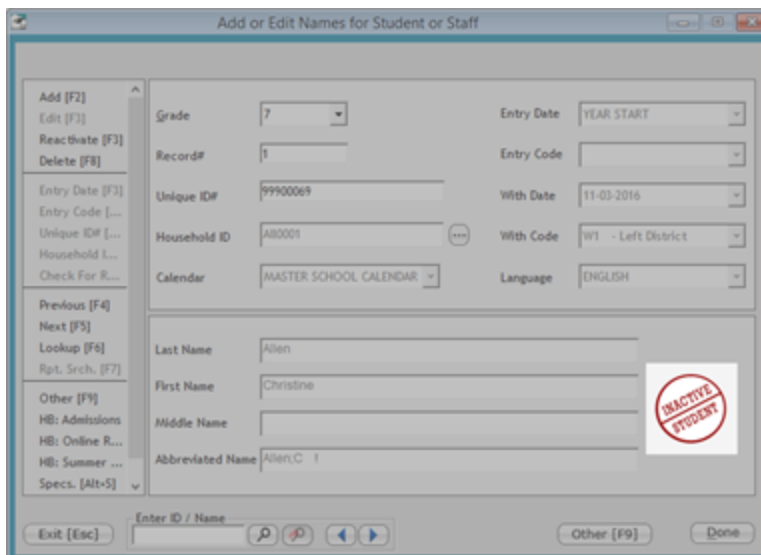
Inactivate or Reactivate a Student

1. In **Data Base**, click **Lookup**, and select the student.
The selected student appears in the Snapshot area.
2. To inactivate the student, click .




3. Click **Inactivate this member**, click **Next**, and then click **Done**.

The student's status changes to inactive, and a red INACTIVE STUDENT label is added to the record.



4. Optional: To reactivate the student in the future, repeat steps 1 and 2, select **Reactivate this member**, click **Next**, and click **Done**.

Delete a Student

1. In **Data Base**, click **Lookup**.
2. Navigate to the desired student, and click the student's name.
3. Click .
4. Click **Accept**.
5. Click **Delete** in the leftmost panel.

6. Confirm the warning to delete the student.

7. Click **Done**.

Page left blank intentionally.

CHAPTER 2


Personalize Data Base

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2.1 Create a User Account

Add new user accounts to AdminPlus to allow administration personnel to access different parts of your software. After a new user account is created, it's immediately visible on your login screen for use. This topic only covers creating the user account. For more information on setting permissions and rights for the user, see "Edit Portfolio Document Permissions" on page 69 and "Edit User Rights" on page 35.

1. Click **New > User** on the main navigation bar.
2. Click **1. Manage users**, and click **Next**.
3. Click **New User [F2]**.
4. Enter a user account name in the **User Name** column, and then press **Enter** on your keyboard. The **Enter Password** dialog box appears.
5. Enter a password in the **New Password** and **Re-type New Password** text boxes, and click **Done**.

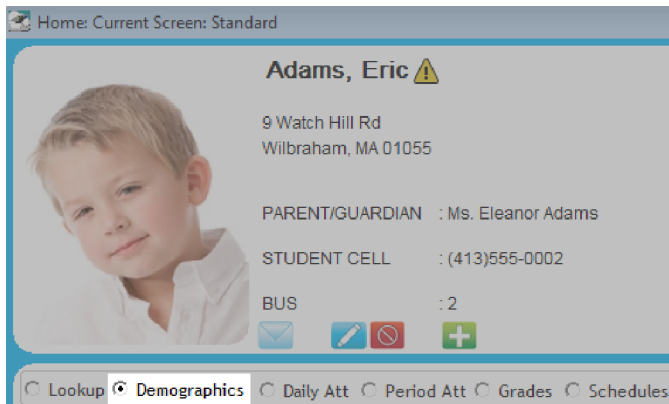
A screenshot of the 'Enter Password' dialog box. The dialog has a blue title bar with the text 'Enter Password' and a close button (X). The main area is light gray and contains the title 'Enter Password' in bold. Below the title are two text input fields. The first field is labeled 'New Password' and the second is labeled 'Re-type New Password'. Both fields contain a series of asterisks (*****). At the bottom of the dialog are two buttons: 'Cancel' and 'Done'.

2.2 Create a New Database Field

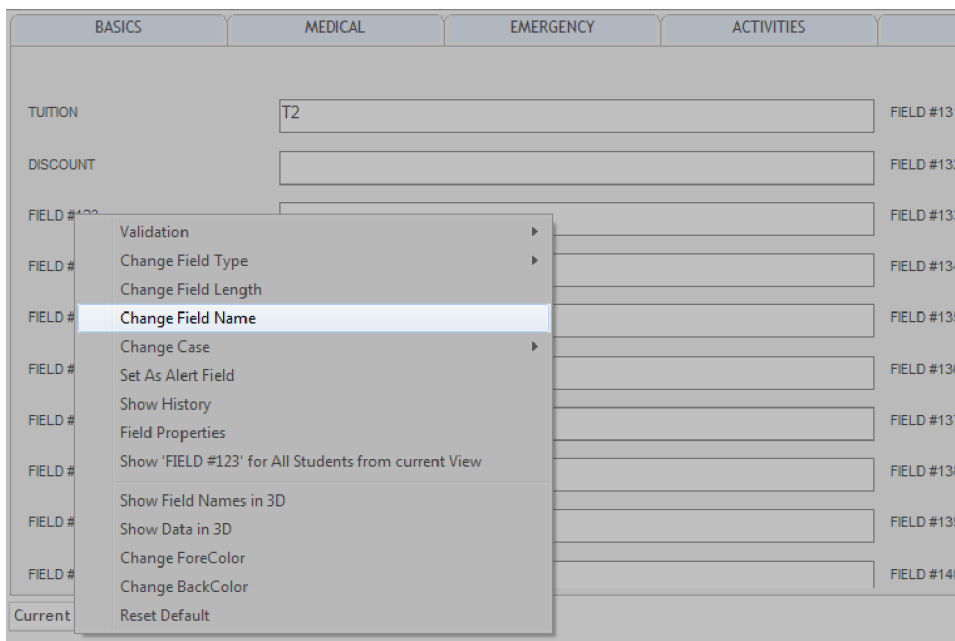
When you're working in AdminPlus, you can add new fields to the Data Base module to store more data.

Note: You must be logged in as a supervisor to create a new database field.

1. In **Data Base**, click **Address**, and click a student.
2. Click **Demographics**, and browse through the demographic tabs to find an unused database field.



3. Right-click an unused demographic field, and then click **Change Field Name**.



4. Type the desired field name, and press **Enter**.

BASICS	MEDICAL
TUITION	T2
DISCOUNT	
Edit Field Name	Outdoor Allergy

5. To change the field type, right-click the field again, click **Change Field Type**, and then click one of the field type options.

BASICS	MEDICAL	EMERGENCY	ACTIVITIES
TUITION	T2		
DISCOUNT			
Outdoor Allergy			
FIELD #124			
FIELD #125			
FIELD #126			
FIELD #127			
FIELD #128			
FIELD #129			
FIELD #130			
Current School			

Validation

Change Field Type

Change Field Length

Change Field Name

Change Case

Set As Alert Field

Show History

Field Properties

Show 'Outdoor Allergy' for All Students from current View

Show Field Names in 3D

Show Data in 3D

Change ForeColor

Change BackColor

Reset Default

Date

Numeric

Text

Custom...

E-Mail

Derived...

Conditional Derived...

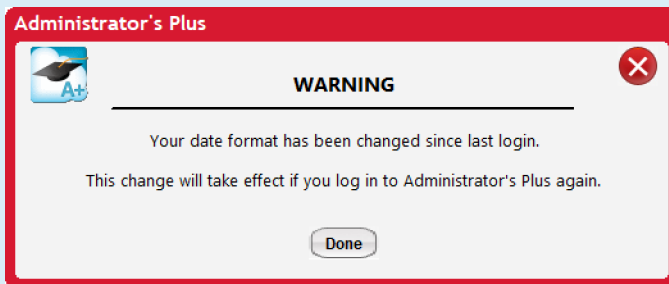
Linked Field Picture

2.3 Change Date Format

If you're logged in as supervisor, you can change how dates are displayed in AdminPlus database fields. When you change the date format, the new format applies to all fields that have been set as a date field type.

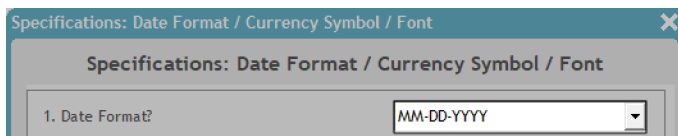
Note: Dates stored in database fields that aren't set as date fields (for example, database fields set as text or numeric field types) won't be changed.

You can only change the date format once each time you log in to AdminPlus. If you've already changed the date format since your last login, attempting to change the date format again will result in a warning message that prompts you to close AdminPlus and log in again.

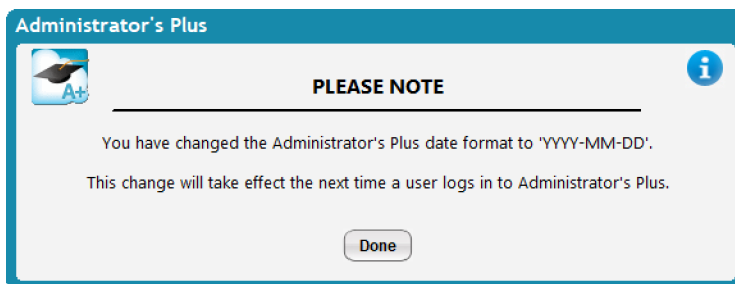


To change the date format for database fields, do the following:

1. In the AdminPlus toolbar, click **Setup > General > Date Format and Currency Symbol**.
2. For **Date Format**, select the desired format using the drop-down list, and then click **Done**.



The **Please Note** message appears to confirm that you want to change the date format for all database fields. Click **Done** to continue.



3. Restart AdminPlus to refresh the date format.

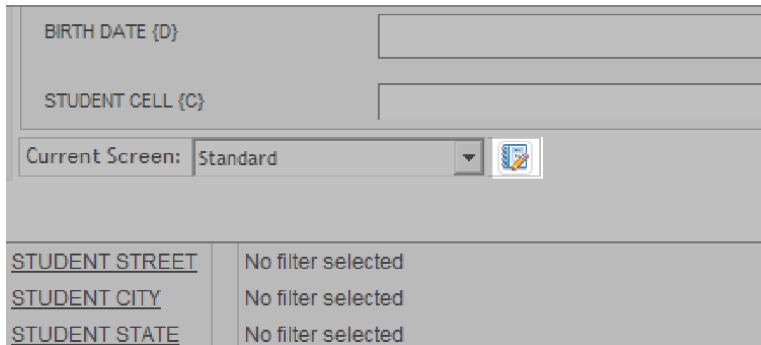
Note: The date format will only update once you've closed AdminPlus and logged in again. Database fields don't automatically refresh when you click **Done** to confirm the **Please Note** message.


2.4 Create a Personalized Demographics Screen



While looking at student or staff demographic information in AdminPlus, you can utilize the Screen feature to create a personalized view to display information in your preferred order. The Screen feature provides the flexibility for you to show your most frequently accessed demographic information on any demographic tab so you can easily find student and staff information.

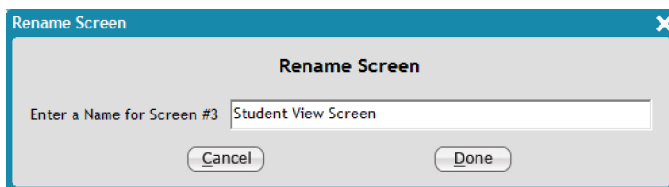
1. In **Data Base**, click **Demographics** on the Home screen.


2. Click .



BIRTH DATE {D}	
STUDENT CELL {C}	
Current Screen:	Standard 
STUDENT STREET	No filter selected
STUDENT CITY	No filter selected
STUDENT STATE	No filter selected

3. In the **View/Edit Which Screen** dialog box, click an unused screen, and click **Select**.
4. In the upper-right corner, click **Student** to display student fields, or click **Staff** to display staff fields.
5. Click a tab on the right side of the **Selected Fields** column to choose which page you want your fields to be displayed on.
6. Click a field in the **Selected Fields** column, and click  to remove the field from your screen view, or click **Delete All [F7]** to clear all the **Selected Fields**.
7. Click a tab on the left side of the **Available Fields** column to navigate through the different fields.
8. Click a field in the **Available Fields** column, and click  to add the field to your screen view.
9. Repeat steps 5–8 to assign the desired fields to your screen.
10. Click **Accept [F10]**.
11. In the **Rename Screen** dialog box, enter a name for your screen, and click **Done**.



Rename Screen 

Rename Screen

Enter a Name for Screen #3

- Click the desired screen from the **Current Screen** drop-down list to show your personalized view.

Current Screen: Student view screen

STUDENT STREET

STUDENT CITY

STUDENT STATE

Demo testing

Staff

Standard

Student view screen

No filter selected

No filter selected

The following diagram summarizes how to personalize your demographics tabs (steps 4–10):

Screen #3: ** UNUSED **

Select fields for Page: Page 1

Student Staff

Available Fields

Field Name	Field #
PARENT/GUARDIAN	(1)
STUDENT STREET	(2)
STUDENT CITY	(3)
STUDENT STATE	(4)
STUDENT ZIP	(5)
HOUSEHOLD PHONE	(6)
HOMEROOM	(7)
GENDER	(8)
BIRTH DATE	(9)
STUDENT CELL	(10)
BUS	(11)
NICKNAME	(12)
LOCKER #	(13)
LOCK CMB	(14)
ETHNICITY	(15)
GRAD DATE	(16)
PHYSICAL	(17)
PARKING	(18)
COUNSELOR	(19)
ADVISOR	(20)

Selected Fields

#	Field Name	Field #
1)	PARENT/GUARDIAN	(1)
2)	STUDENT STREET	(2)
3)	STUDENT CITY	(3)
4)	STUDENT STATE	(4)
5)	STUDENT ZIP	(5)
6)	HOUSEHOLD PHONE	(6)
7)	HOMEROOM	(7)
8)	GENDER	(8)
9)	BIRTH DATE	(9)
10)	STUDENT CELL	(10)
11)	BUS	(11)
12)	NICKNAME	(12)
13)	LOCKER #	(13)
14)	LOCK CMB	(14)
15)	ETHNICITY	(15)
16)	GRAD DATE	(16)
17)	PHYSICAL	(17)
18)	PARKING	(18)
19)	COUNSELOR	(19)
20)	ADVISOR	(20)

Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 Page 7 Page 8 Page 9 Page 10 Page 11 Page 12 Page 13

Default Sort Order

Abort [Esc] Staff [F3] Delete All [F7] Delete [F8] Rename [F9] Accept [F10]

Personalize Demographics Tabs

- A Each tab (page) corresponds to a tab on your personalized **Demographics** screen. Clicking a tab displays all assigned fields for that tab.
- B The demographic fields you've assigned for the selected tab appear in the **Selected Fields** column.
- C Use the left arrow to remove/clear an assigned field in the **Selected Fields** column. This is how you make room for a new personalized field.
- D Each one of these tabs presents you with a number of different available demographic fields you can choose from. (These tabs represent your options but not your actual selections.)
- E Clicking a tab on the left displays all available demographic fields for that tab in the **Available Fields** column. (These fields represent your available options but not your actual selections.)

Personalize Demographics Tabs

F

Use the right arrow to assign/personalize a field by transferring the field from the **Available Fields** column to the **Selected Fields** column.

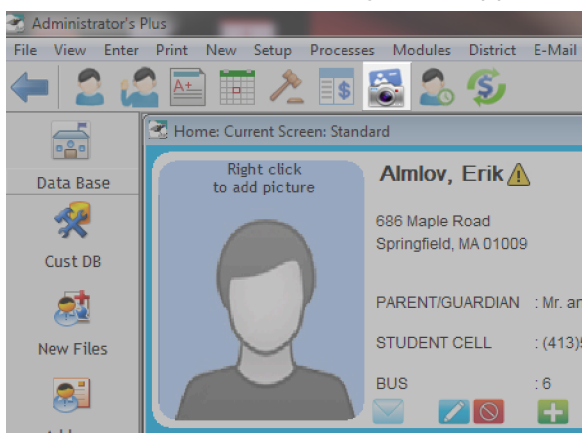
2.5 Import Pictures

You can personalize your AdminPlus experience by importing pictures of students to display in the student snapshot.

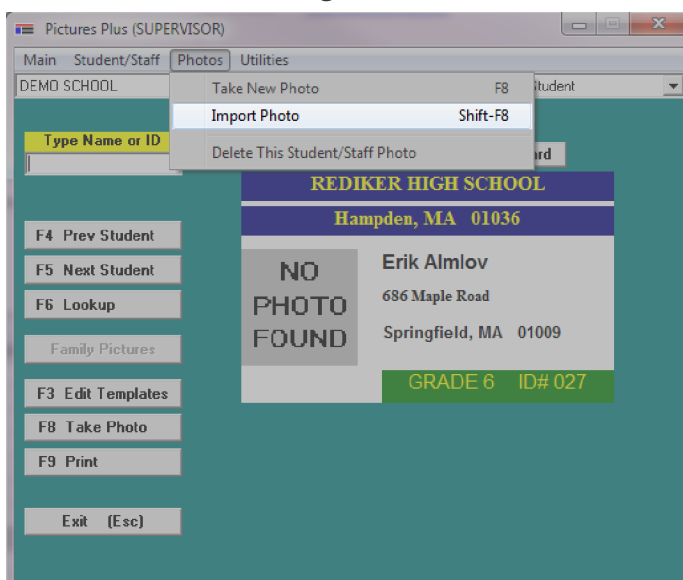
Tip: If the pictures are named according to the Administrator's Plus ID number (for example, 12001.bmp) they can be copied into the RS4\DATA\SchoolName\SchoolYear\Pix folder, which associates the picture with the appropriate student. This method only works with the Administrator's Plus ID.

To import a picture for an individual student, do the following:

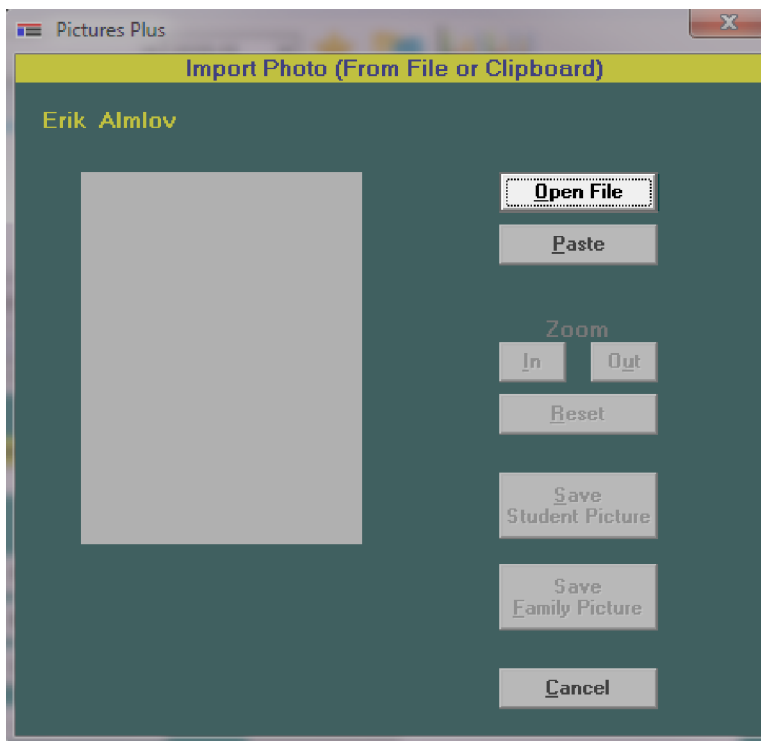
1. In **Data Base**, click **Address**, and click a student.
2. Click the **Pictures Plus** hot key at the upper-left corner.



3. In the **Pictures Plus** dialog box, click **Photos** on the menu bar, and then click **Import Photo**.



4. Click **Open File**.

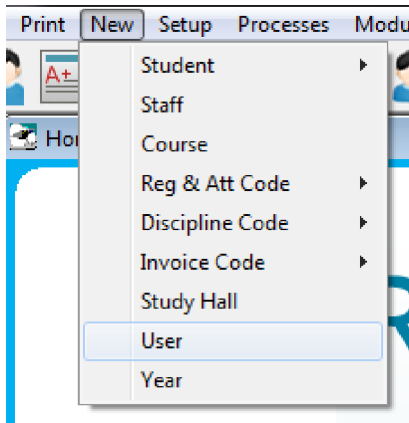


5. Browse for the picture file, and click **Open**.
6. Click **Save Student Picture**.

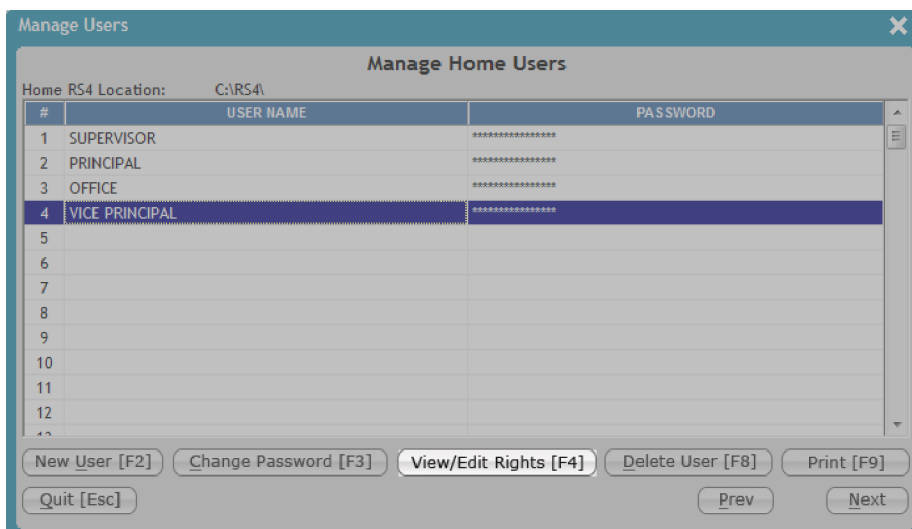
2.6 Edit User Rights

You can set specific rights for each AdminPlus user to control the user's access to different modules and pages. You can either give the user full rights or set specific restrictions based on the user's role.

1. On the menu bar, click **New > User**.



2. Click **Manage users**, and click **Next**.
3. Click the name of the user whose rights you want to edit, and click **View/Edit Rights [F4]**.



4. Click the school you want to edit, and do one of the following:
 - Click **Copy Rights From Another User**, click the **User Name** from which you want to copy rights, and click **Done**.
 - Click **Copy Rights From Another School**, click a school from the **School Lookup** dialog box, and click **Select**.
 - Click **Edit Rights For the Highlighted School**, and do the following:
 1. Next to each module or page, select the check box **ALL** (read, write, and delete rights), **READ** (read-only rights), or **NO** (restricted access).

Tip: Select the **Access To TeacherPlus - Manage Users** check box to allow this user to access the Manage Users section of the TeacherPlus Setup & Sync Manager.

2. Click **Done**.
5. Click **Done**.
6. Do one of the following:
 - Click **Copy Rights to Past Years** to apply the recently changed rights to the past years in AdminPlus.
 - Click **View Past Year Rights** to view or manually change the rights in past years.
 - Click **Cancel** to exit and save the changes you made to the user rights.

CHAPTER 3

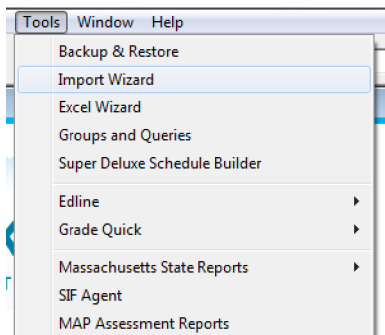
Manage Student Data

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3.1 Import Data

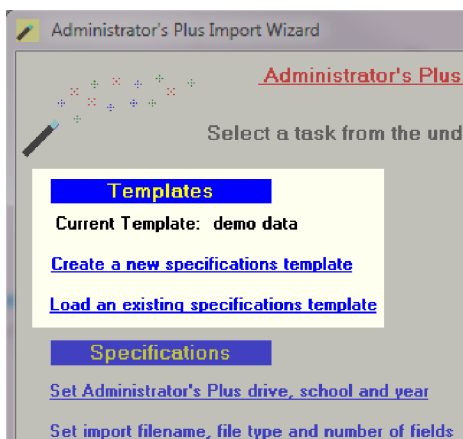
Importing data is one of the key features of AdminPlus Data Base. If you have a file with data outside of AdminPlus and you don't want to manually enter each data field, you can quickly import data with the **Import Wizard**. The **Import Wizard** maps AdminPlus fields to your import file fields to successfully and accurately import data in the correct field.

1. Make sure that all AdminPlus users are logged out of the system and that you have backed up your current year.
2. In **Data Base**, click **Tools > Import Wizard** on the menu bar.



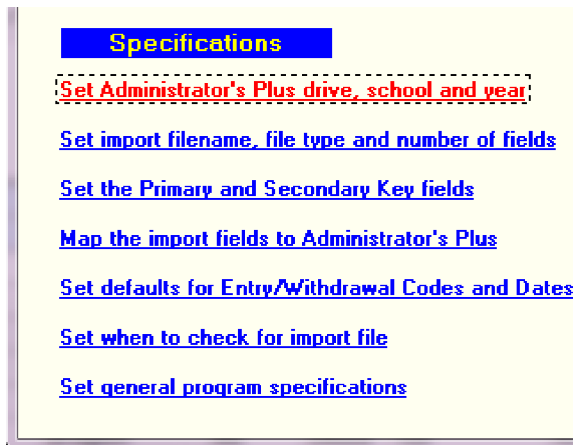
3. Click **Create a new specifications template** or **Load an existing specifications template**.

Warning: Only click **Load an existing specifications template** if the import file is the exact same format as a previous import file.



4. Click **Set Administrator's Plus drive, school and year**, and configure the following settings:
 - Browse your computer for the RS4 folder.
 - Click the name of your school from the drop-down list.

- Click the school year from the drop-down list.



5. Click **Save** to return to the **Import Wizard**.
6. Click **Set import filename, file type and number of fields**, and configure the following settings:
 - **Set import file (path and filename):** Click **Browse** to browse your computer for the file you want to import.
 - **Select Import File Type:** Click the import file type for your data.
 - Click **Student Import** if you're importing student data, or click **Staff Import** if you're importing staff data.
 - **How many header lines to ignore:** Enter the number of header lines at the beginning of the file that AdminPlus should ignore when importing data.
 - **Which header line, if any, contains field names:** Enter the number where the header line is located that contains the field names for your data.
 - **How many fields per record:** Enter the number of fields for each student record.

 A screenshot of the "Administrator's Plus Import Wizard: Template 'demo data'" window. The window has a yellow background and a title bar. The main content area is titled "Import File Specifications" in red. It contains several sections:

- Set import file (path and filename):** A text box with the path "C:\Users\Teresa\Desktop\demo data for import.csv" and a "Browse" button.
- Select Import File Type:** Three radio buttons: "Comma delimited" (selected), "Tab delimited", and "Fixed-width".
- Import Type:** Two radio buttons: "Student Import" (selected) and "Staff Import".
- How many header lines to ignore? (Including blank lines):** A text box with the value "1".
- Which header line, if any, contains field names? (Including blank lines):** A text box with the value "1".
- How many fields per record?:** A text box with the value "40".

 At the bottom, there are three buttons: "Help", "Save", and "Cancel".

7. Click **Save** to return to the **Import Wizard**.
8. Click **Set the Primary and Secondary Key fields**, and configure the following:

Warning: Only use secondary fields if your primary key field isn't unique in your AdminPlus Data Base. The use of secondary fields can cause errors if your primary field is unique.

- **Primary Key field in the import file:** Click the number of the location of the primary key field in your import file.

Note: The primary key is an item that should be unique to identify a student in AdminPlus. This item must exist in both the import file and the AdminPlus Data Base. Matching this data ensures that the other data fields in the file import successfully into the correct student's file.

- **Primary Key in Administrator's Plus:** Click the primary key in AdminPlus from the drop-down list.
- **Field in the import file:** Click optional secondary fields from the drop-down list that match secondary fields in AdminPlus to ensure a successful import into the correct student's information.
- **Field in Administrator's Plus:** Click optional secondary fields from the drop-down list that match secondary fields in the import file to ensure a successful import into the correct student's information.
- **How many Secondary Keys must match for the student to be updated:** Enter the number of secondary key fields you chose to include in the text box.

Administrator's Plus Import Wizard : Template "demo data"

Set Primary and Secondary Keys

The Administrator's Plus Fields used below are those defined in
DEMO SCHOOL 2013-14

The Primary Key is an item of data that should uniquely identify an individual student (like a social security number). This item of data must exist in both the import file and your Administrator's Plus data base. Matching this data ensures that the information in each line of the import file gets posted to the correct student. You must set a Primary Key.

Primary Key field in the import file **Primary Key in Administrator's Plus**

1 Unique ID

Secondary Keys are optional and can be used as an additional check to ensure that the correct student is updated. You can also set how many of the Secondary Keys must match. For example, you can set the keys to Lastname, Firstname and Date of Birth. Then you can set that at least two of the three keys must match for the student to be updated.

Field in the import file **Field in Administrator's Plus**

Not Set Not Mapped

Not Set Not Mapped

Not Set Not Mapped

How many Secondary Keys must match for the student to be updated? 0

[Advanced](#) [Help](#) [Save](#) [Cancel](#)

9. Click **Save** to return to the **Import Wizard**.

10. Click **Map the import fields to Administrator's Plus**, and do the following:

1. Click a field to change the field name if necessary, and repeat for any field name requiring a change.

Note: To navigate up or down the list of fields, click **Prev 10 Fields (PgUp)** or **Next 10 Fields (PgDn)**.

Warning: Only change the case of a field if you want to reformat the data in a Data Base field. It's recommended not to change the case of the field as this can cause errors.

2. Ensure that all fields are correctly assigned, and click **Confirm mapping**.
3. Click **Save**.

The screenshot shows the 'Administrator's Plus Import Wizard : Template "demo data"' window. It features a table for mapping import fields to AP fields. The table has three columns: 'Data From...', 'Mapped to AP as ...', and 'Change Case To...'. There are 10 rows of mapping. Below the table are buttons for 'Prev 10 Fields (PgUp)', 'Next 10 Fields (PgDn)', 'Confirm Mapping', 'Help', 'Save', and 'Cancel'.

Data From...	Mapped to AP as ...	Change Case To...
Import File - Field #1	Unique ID	*** Do Not Change ***
Import File - Field #2	Last Name	*** Do Not Change ***
Import File - Field #3	First Name	*** Do Not Change ***
Import File - Field #4	Middle Name	*** Do Not Change ***
Import File - Field #5	Active/Inactive Status	*** Do Not Change ***
Import File - Field #6	BIRTH DATE	*** Do Not Change ***
Import File - Field #7	STUDENT CELL	*** Do Not Change ***
Import File - Field #8	EMERGENCY 1	*** Do Not Change ***
Import File - Field #9	E1 PHONE	*** Do Not Change ***
Import File - Field #10	E1 CELL	*** Do Not Change ***

Prev 10 Fields (PgUp) Confirm Mapping

Next 10 Fields (PgDn) Help Save Cancel

11. Click **Set defaults for Entry/Withdrawal Codes and Dates**, and configure the following settings:

Warning: Only configure these settings if you're importing new students.

- **ADDED First Member Day:** For new students, click the day that the imported students are considered members of the school from the drop-down list.
- **ADDED Entry Code:** For new students, click the entry code from the drop-down list that represents how the students entered into the school.
- **REACTIVATED First Member Day:** For reactivated students, click the day that the imported students are considered members of the school from the drop-down list.

- **REACTIVATED Entry Code:** For reactivated students, click the entry code from the drop-down list that represents how the students entered into the school.
- **INACTIVATED Last Member Day:** For inactivated students, click the day that the imported students are last considered members of the school from the drop-down list.
- **INACTIVATED Withdrawal Code:** For inactivated students, click the withdrawal code from the drop-down list that represents how the students left the school.

Administrator's Plus Import Wizard : Template "demo data"

Entry/Withdrawal Codes and Dates

If the import file does not contain fields mapped as First Member Day or Entry Code, the settings below will be used when new students are ADDED to Administrator's Plus.

ADDED

First Member Day: Tomorrow

Entry Code: E1 Transfer

If the import file does not contain fields mapped as First Member Day or Entry Code, the settings below will be used when students are REACTIVATED.

REACTIVATED

First Member Day: Yesterday

Entry Code: E3 Enter In State

If the import file does not contain fields mapped as Last Member Day or Withdrawal Code, the settings below will be used when students are INACTIVATED.

INACTIVATED

Last Member Day: Today

Withdrawal Code: W3 Dropped Out

[Help](#) [Save](#) [Cancel](#)

12. Click **Save** to return to the **Import Wizard**.
13. Click **Perform import test**, and correct any errors that appear.

ard
1.5.42
ns below

Import

[Import Now](#)

[Perform import test](#)

[View a log file](#)

14. Click **Import Now**.

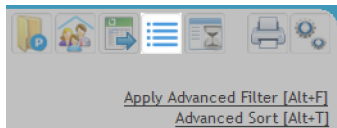
3.2 Enter or Erase Multiple Fields at Once

By using the Batch feature, you can conveniently add or erase data in multiple fields for multiple students or staff at one time. The Batch feature provides a fast and efficient method of entering or erasing data for your school. You can batch enter or batch erase fields in a specific grade level, in all grades, or in staff demographics.

Enter Multiple Fields at Once

1. In **Data Base**, click **Address**.

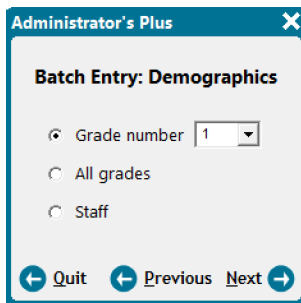
2. Click .



3. Click **1. Batch entry**, and click **Next**.

4. Click one of the following, and then click **Next**:


- **Grade number**: Click this option if you want to add data to one or more fields in a specific grade level, and then click the grade level from the drop-down list.
- **All grades**: Click this option if you want to add data to one or more fields in all grade levels.
- **Staff**: Click this option if you want to add data to one or more fields in staff demographics.

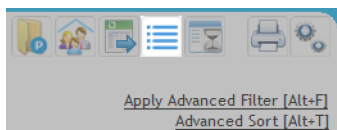


5. In the **Batch Entry For** dialog box, enter data into the applicable fields to batch add data.

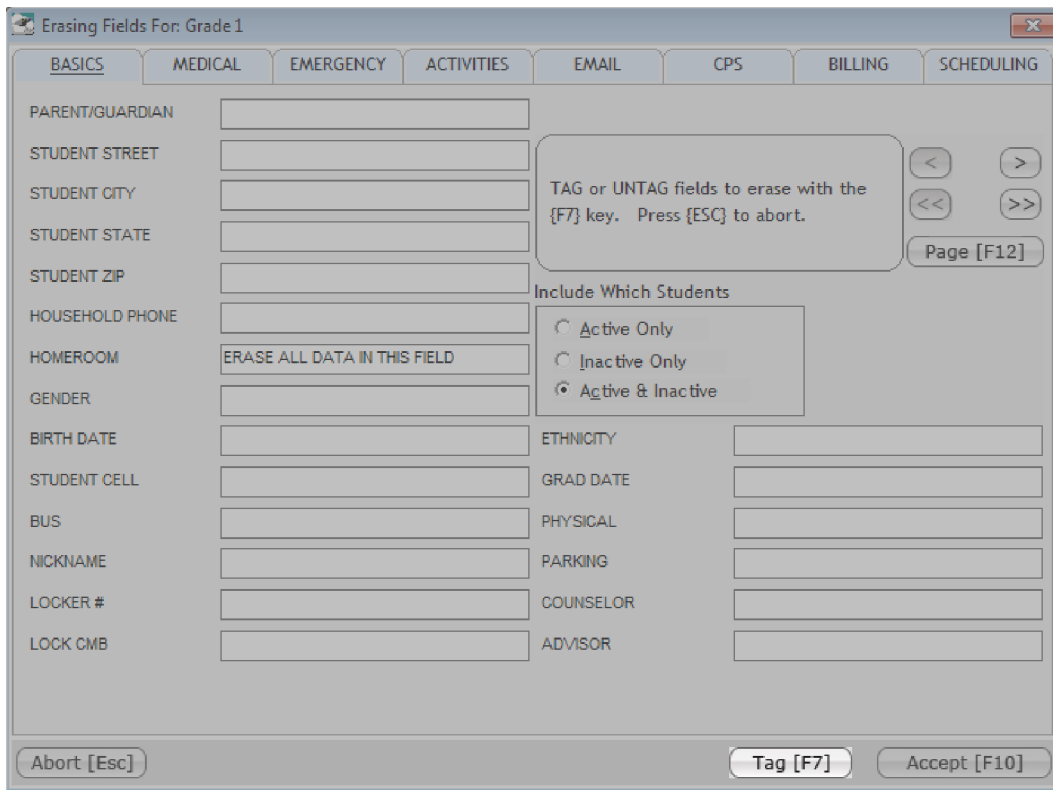
6. Click **Accept [F10]**.
7. Click **All members** to add the field for all members in your selected category, and click **Next**.

Erase Multiple Fields at Once

1. In **Data Base**, click **Address**.
2. Click .

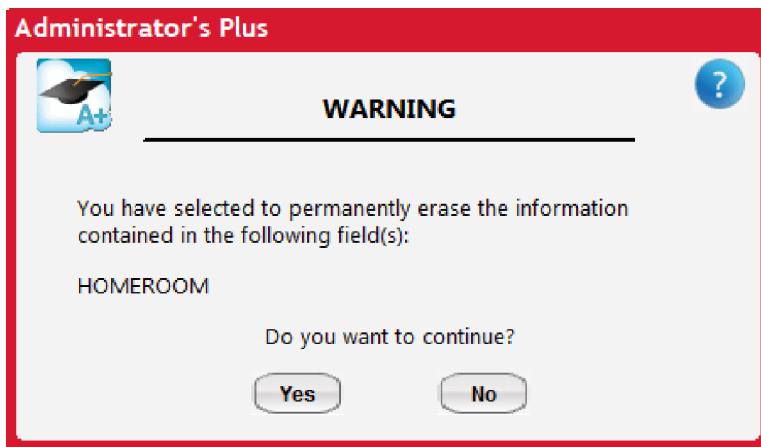


3. Click **2. Erase all data in one or more fields**, and click **Next**.
4. Click one of the following, and then click **Next**:
 - **Grade number**: Click this option if you want to erase data from one or more fields in a specific grade level, and then click the grade level from the drop-down list.
 - **All grades**: Click this option if you want to erase data from one or more fields in all grade levels.
 - **Staff**: Click this option if you want to erase data from one or more fields in staff demographics.
5. In the **Erasing Fields For** dialog box, click the applicable field, and click **Tag [F7]**.



The screenshot shows a software window titled "Erasing Fields For: Grade 1". It features a tabbed interface with tabs for BASICS, MEDICAL, EMERGENCY, ACTIVITIES, EMAIL, CPS, BILLING, and SCHEDULING. The BASICS tab is active, displaying a list of student fields: PARENT/GUARDIAN, STUDENT STREET, STUDENT CITY, STUDENT STATE, STUDENT ZIP, HOUSEHOLD PHONE, HOMEROOM, GENDER, BIRTH DATE, STUDENT CELL, BUS, NICKNAME, LOCKER #, and LOCK CMB. The HOMEROOM field is highlighted with a red border and contains the text "ERASE ALL DATA IN THIS FIELD". To the right of the fields, there is a text box that says "TAG or UNTAG fields to erase with the [F7] key. Press [ESC] to abort." Below this, there is a section titled "Include Which Students" with three radio button options: "Active Only", "Inactive Only", and "Active & Inactive" (which is selected). At the bottom of the window, there are three buttons: "Abort [Esc]", "Tag [F7]", and "Accept [F10]".

6. Repeat step 5 for all fields you want to erase.
7. Click **Accept [F10]**, and then click **Yes** to confirm the warning that appears.



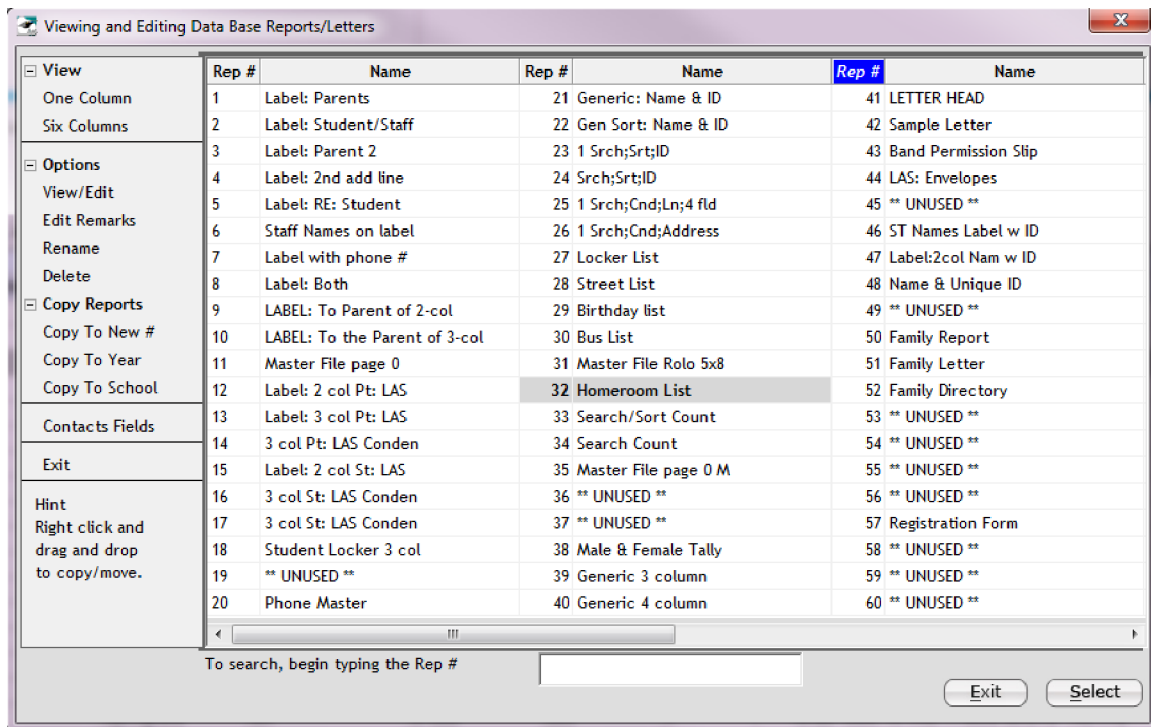
The screenshot shows a warning dialog box titled "Administrator's Plus". It has a red border and a blue question mark icon in the top right corner. The main text reads: "WARNING". Below this, it says: "You have selected to permanently erase the information contained in the following field(s):". The field "HOMEROOM" is listed. At the bottom, it asks: "Do you want to continue?" with two buttons: "Yes" and "No".

8. Click **All members** to erase the tagged data for all members in your selected category, and click **Next**.

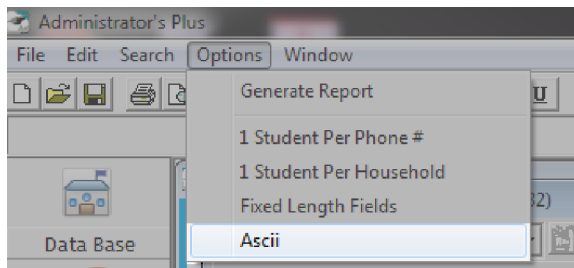
3.3 Generate an ASCII File Report for Excel Import

As you generate a report, you can export the report as an ASCII file, which is compatible with an Excel import. You can conveniently generate an ASCII file of your report in the Data Base Report Writer.

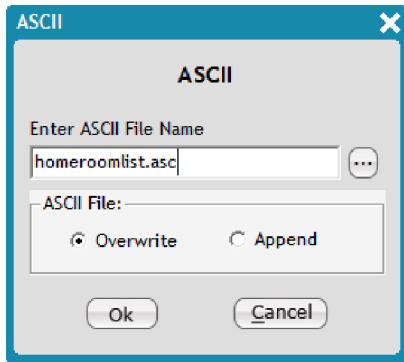
1. In **Data Base**, click **DB RW**.
2. In the **Specifications: Data Base Report Writer** dialog box, click **Done** at the bottom.
3. Click **View/edit letters/reports**, and click **Next**.
4. In the **Viewing and Editing Data Base Reports/Letters** dialog box, click the report you want to export, and click **Select**.



5. On the menu bar, click **Options > Ascii**.



6. Enter the drive, path, and file name in the format: "X:\FolderName\FileName.asc," and then click **OK**.



Note: When the report is generated, it's exported to the selected folder at the same time it appears in the print preview screen.

7. Click **Accept** at the bottom right, select a demographic (for example, **all grades combined** or **Staff**), and click **Next**.
8. Select which students will be included, and click **Next**.

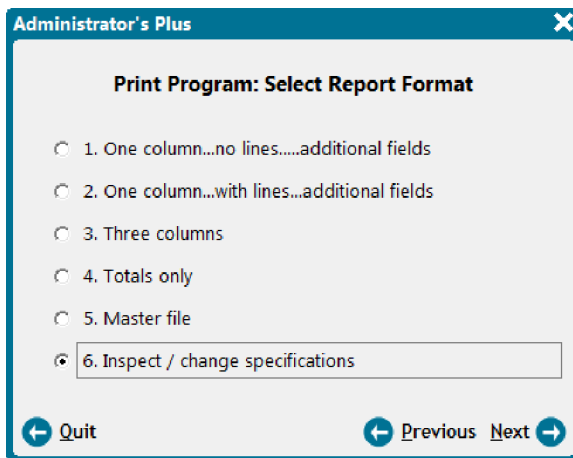
The report opens in a new window. After the report is fully generated, the ASCII file on your machine will also be populated with the data. A quick way to check if the ASCII file has been fully populated (after the report is generated) is to open the file with a basic text editor, such as Notepad (Windows) or TextEdit (Mac).

3.4 Export Selected Students to an AdminPlus File

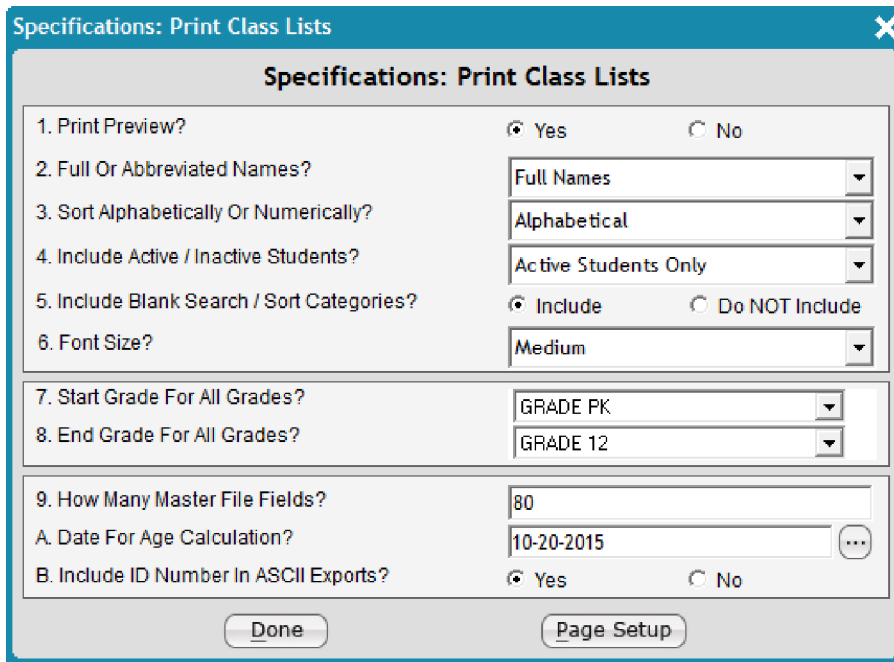
When transferring student data, you can choose a select group of students to export into an AdminPlus file. This is a two-step process: The first part involves creating a file containing the names of students to be included in the export. The second part of the process is exporting the students included in the "Special.txt" file.

Create the Export File

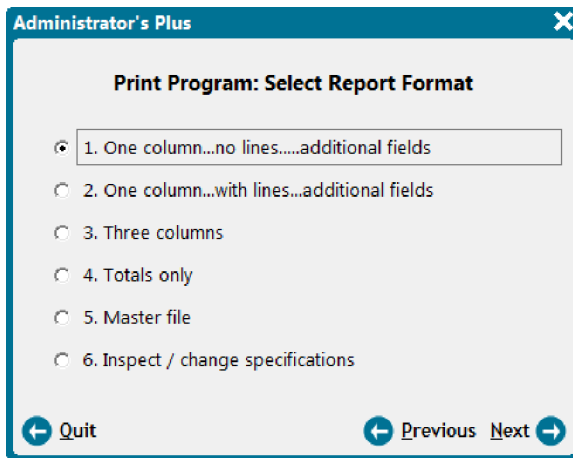
1. In **Data Base**, click **Print Prog.**
2. In the **Print Program** dialog box, click **Inspect/change specifications**, and click **Next**.



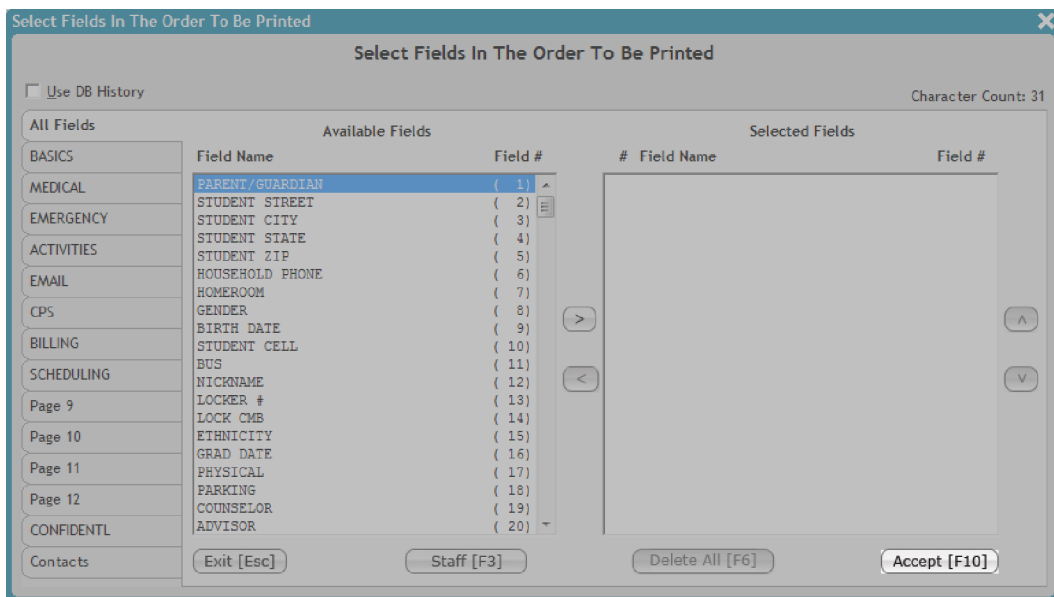
3. Set your desired specifications, click **Yes** to **Include ID Number in ASCII Exports**, and click **Done**.



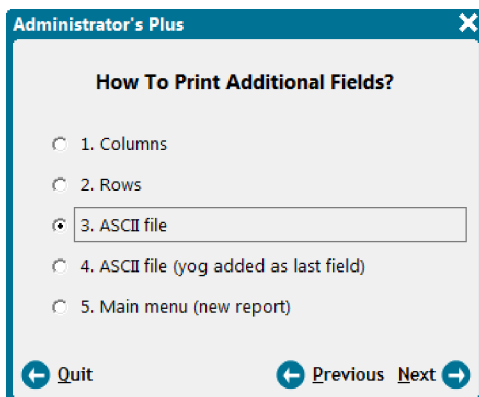
- In the **Print Program** dialog box, click **One column...no lines...additional fields**, and click **Next**.



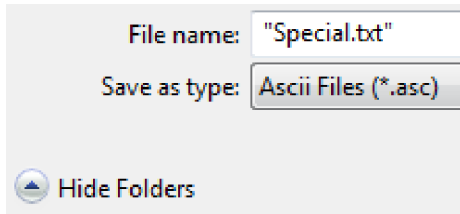
- In the **Select Fields In Order To Be Printed** dialog box, click **Accept [F10]** at the bottom right.



- Click **ASCII file**, and click **Next**.

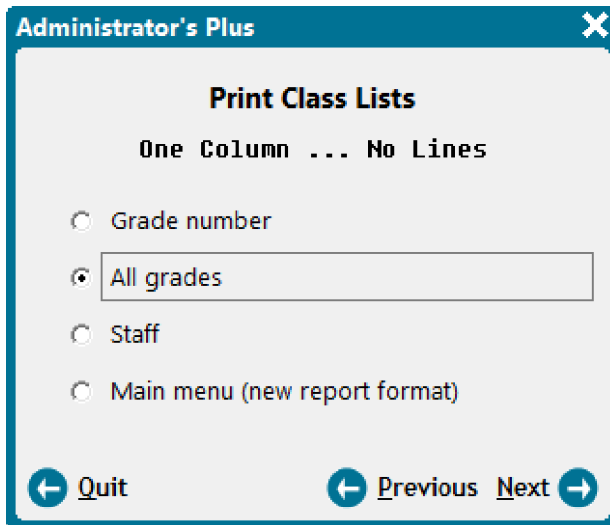


7. In the **Save As** dialog box, browse for the export location, name the file "Special.txt" (with quotes), and click **Save**.



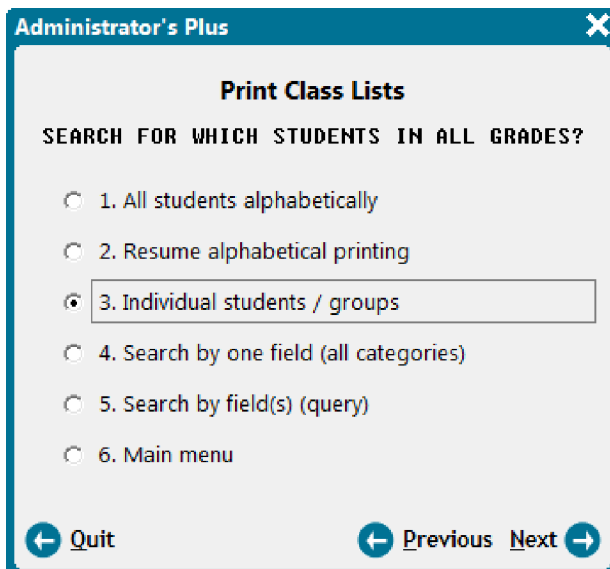
A screenshot of a 'Save As' dialog box. It has a 'File name:' field containing '"Special.txt"' and a 'Save as type:' dropdown menu set to 'Ascii Files (*.asc)'. At the bottom left is a 'Hide Folders' button with a folder icon.

8. Click **All grades**, and then click **Next**.



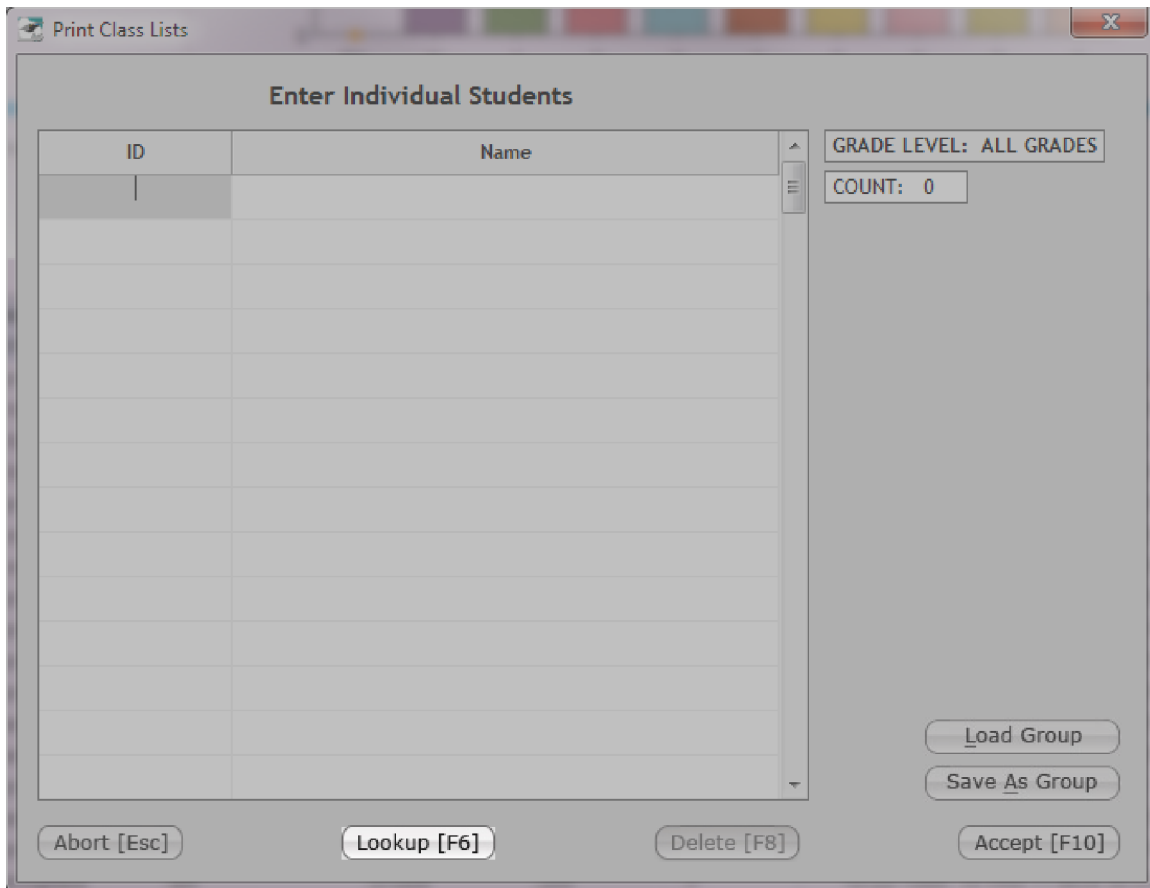
A screenshot of the 'Administrator's Plus' window titled 'Print Class Lists'. It shows 'One Column ... No Lines'. There are four radio button options: 'Grade number', 'All grades' (which is selected), 'Staff', and 'Main menu (new report format)'. At the bottom are buttons for 'Quit', 'Previous', 'Next', and a right arrow.

9. Click **Individual students/groups**, and click **Next**.



A screenshot of the 'Administrator's Plus' window titled 'Print Class Lists'. It asks 'SEARCH FOR WHICH STUDENTS IN ALL GRADES?'. There are six radio button options: '1. All students alphabetically', '2. Resume alphabetical printing', '3. Individual students / groups' (which is selected), '4. Search by one field (all categories)', '5. Search by field(s) (query)', and '6. Main menu'. At the bottom are buttons for 'Quit', 'Previous', 'Next', and a right arrow.


10. In the **Print Class Lists** dialog box, click **Lookup**.

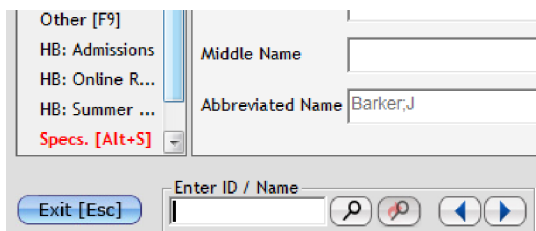


The **Print Class Lists** dialog box features a central table titled "Enter Individual Students" with columns for "ID" and "Name". To the right of the table, there are two input fields: "GRADE LEVEL: ALL GRADES" and "COUNT: 0". At the bottom of the dialog, there are four buttons: "Abort [Esc]", "Lookup [F6]", "Delete [F8]", and "Accept [F10]". On the right side, there are also two buttons: "Load Group" and "Save As Group".

11. In the **Advanced Lookup** dialog box, click each desired student while holding down the **Ctrl** key, and click **Select**.
12. Click **Accept [F10]** to generate a report and the ASCII file.

Export the Students Included in the File

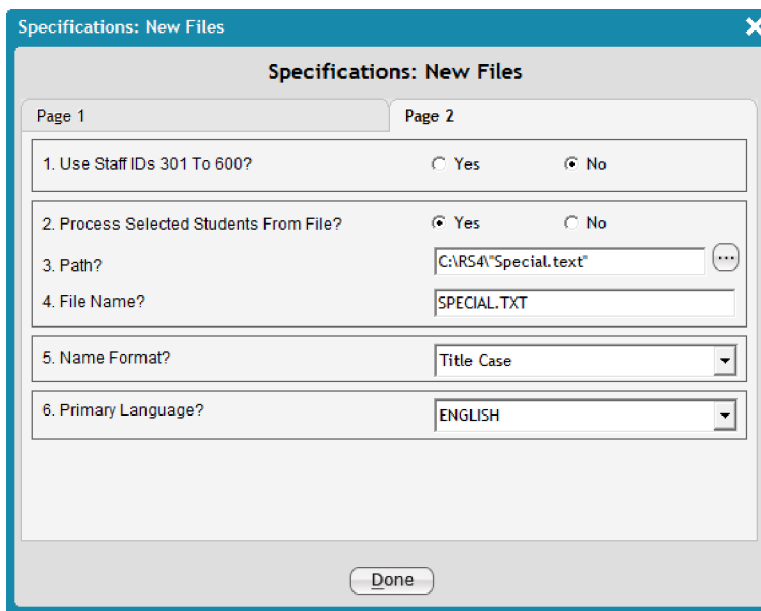
1. In **Data Base**, click **New Files**.
2. Click , click a student from the **Advanced Lookup** dialog box, and click **Select**.
3. Click **Specs. [Alt+S]**.



The **Specifications: New Files** dialog box has a left sidebar with a list of options: "Other [F9]", "HB: Admissions", "HB: Online R...", "HB: Summer ...", and "Specs. [Alt+S]". The "Specs. [Alt+S]" option is highlighted. To the right of the sidebar, there are two input fields: "Middle Name" and "Abbreviated Name" (containing the text "Barker,J"). At the bottom, there is an "Exit [Esc]" button and a section labeled "Enter ID / Name" with a text input field and two navigation buttons (left and right arrows).

4. In the **Specifications: New Files** dialog box, click the **Page 2** tab.
5. Set **2. Process Selected Students From File** to **Yes**.

6. In **3. Path**, browse for the location of the "Special.txt" file.
7. Make sure **4. File Name** is set to **SPECIAL.TXT**.

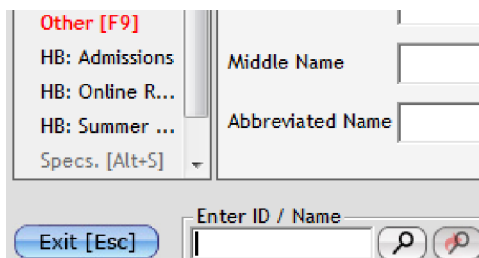


The image shows the 'Specifications: New Files' dialog box, specifically Page 2. It contains the following settings:

- 1. Use Staff IDs 301 To 600?: ☐ Yes ☒ No
- 2. Process Selected Students From File?: ☒ Yes ☐ No
- 3. Path?: C:\RS4\Special.txt (with a browse button)
- 4. File Name?: SPECIAL.TXT
- 5. Name Format?: Title Case (dropdown menu)
- 6. Primary Language?: ENGLISH (dropdown menu)

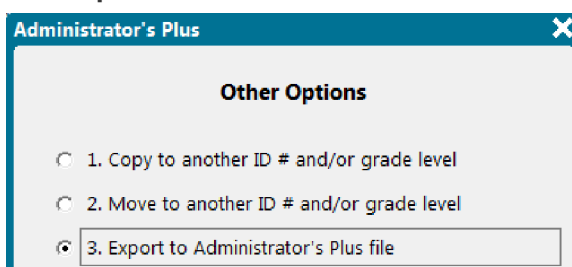
A 'Done' button is located at the bottom center of the dialog.

8. Click **Done**.
9. In the **New Files** dialog box, click **Other [F9]**.



The image shows the 'New Files' dialog box with the 'Other [F9]' tab selected. It includes a list of options on the left: 'Other [F9]', 'HB: Admissions', 'HB: Online R...', 'HB: Summer ...', and 'Specs. [Alt+S]'. On the right, there are input fields for 'Middle Name' and 'Abbreviated Name'. At the bottom, there is an 'Exit [Esc]' button and a search bar labeled 'Enter ID / Name' with search and refresh icons.

10. Click **Export to Administrator's Plus file**, and then click **Next**.





The image shows the 'Administrator's Plus' dialog box, specifically the 'Other Options' section. It contains three radio button options:

- ☐ 1. Copy to another ID # and/or grade level
- ☐ 2. Move to another ID # and/or grade level
- ☒ 3. Export to Administrator's Plus file

11. Click **Done**.

3.5 Generate a Birthday Report

AdminPlus enables you to generate and print various reports whenever you need them by using the Data Base Report Writer. The birthday report is one of the most common reports, and you can generate this report at any time during the school year.

1. In **Data Base**, click **DB RW**.
2. In the **Specifications: Data Base Report Writer** dialog box, configure the following settings:
 - **Active Letter/Report:** Click  next to the text box, and click **29 Birthday list**, and click **Select**.
 - **Include Active/Inactive Students:** Click **Active Students Only**, **Active and Inactive Students**, or **Inactive Students Only** depending on which type of students you want to show.
 - **Include Blank Search/Sort Categories:** Click **Include** or **Do NOT Include** to include or leave out any blank entries in your report.
 - **Start Grade for All Grades:** Click the beginning grade where you want to start your report from the drop-down list.
 - **End Grade for All Grades:** Click the last grade where you want to end your report from the drop-down list.
 - **Print Preview:** Choose whether or not you want to view a print preview of your report.
 - **Date for Age Calculation:** Click  next to the text box to set the date as of which you want the ages calculated, and click **OK**.

Tip: Set today's date if you want to know how old students are today.

- **Print Field Name or Description:** Click the field name or the field description to display in the report.

Specifications: Data Base Report Writer

1. Active Letter / Report? Birthday list (Rep #029) ...

2. Include Active / Inactive Students? Active and Inactive Students

3. Include Blank Search / Sort Categories? ☐ Include ☒ Do NOT Include

4. Start Grade For All Grades? Grade PK

5. End Grade For All Grades? Grade 12

6. Print Preview? ☒ Yes ☐ No

7. Date For Age Calculation? 08-25-2015 ...

8. Print Field Name Or Description? ☒ Name ☐ Description

Done

- Click **Done**.
- In the **Administrator's Plus** dialog box, click **All grades combined**, and click **Next**.

Administrator's Plus

Data Base Report Writer

ACTIVE REPORT: Birthday list (Rep #029)

☐ Grade number

☒ All grades combined

- Click **Search by one field (all categories)**, and click **Next**.
- Click **9 BIRTH DATE** from the list of fields, and click **Select**.

Administrator's Plus

Search All Grades By Which Field?

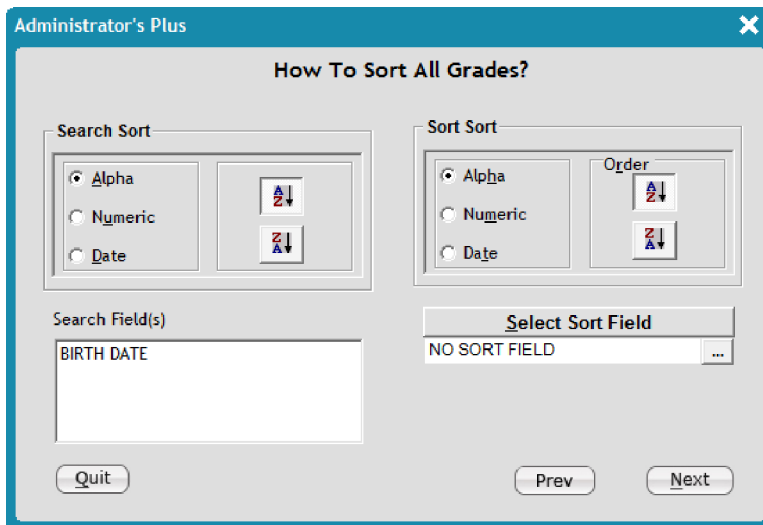
?

#	Description
0	NO SEARCH FIELD
1	PARENT/GUARDIAN
2	STUDENT STREET
3	STUDENT CITY
4	STUDENT STATE
5	STUDENT ZIP
6	HOUSEHOLD PHONE
7	HOMEROOM
8	GENDER
9	BIRTH DATE
10	STUDENT CELL
11	BUS
12	NICKNAME

To search, begin typing a Description

Exit Select

7. Click **Alpha** for both **Search Sort** and **Sort Sort**, and click **Next**.



The dialog box is titled "Administrator's Plus" with a close button (X) in the top right corner. The main title is "How To Sort All Grades?".

Search Sort

- ☒ Alpha
- ☐ Numeric
- ☐ Date

Below the radio buttons are two icons: a box with "A" and a downward arrow, and a box with "Z" and a downward arrow.

Sort Sort

- ☒ Alpha
- ☐ Numeric
- ☐ Date

Below the radio buttons is an "Order" section with two icons: a box with "A" and a downward arrow, and a box with "Z" and a downward arrow.

Search Field(s)

BIRTH DATE

Select Sort Field

NO SORT FIELD ...

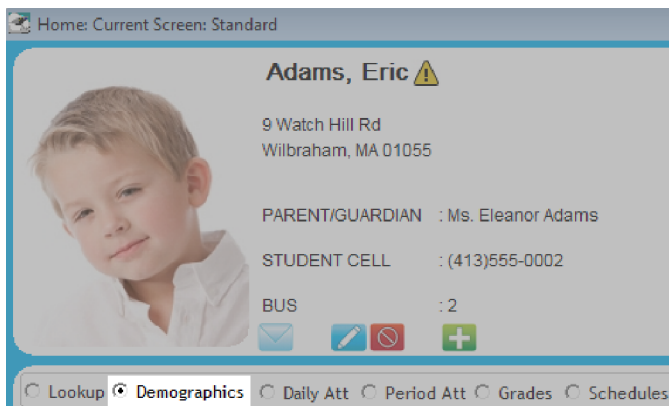
Buttons: Quit, Prev, Next

3.6 Generate a Quick Print Report

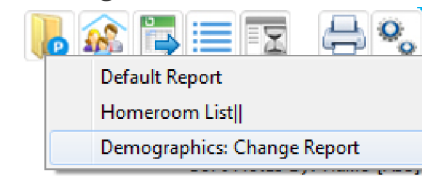
The F9 Print hot key is found at the rightmost side of most student data entry screens. Clicking this hot key generates the default report for the current screen. You can customize this feature to generate a specific report for the selected student. For example, you can configure the print feature in **Report Cards > View/Change** to generate a report card or transcript instead of the default report.

Note: The following task is completed on the **Demographics** screen, but you can access the F9 print feature on any data entry screen by clicking  or pressing **F9** on your keyboard.

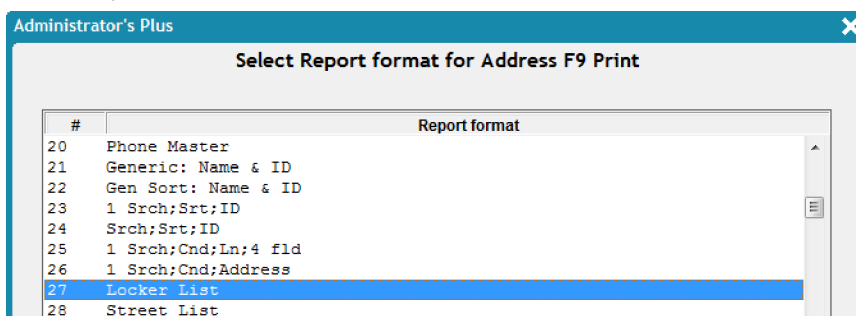
1. In **Data Base**, click **Demographics**.



2. At the rightmost side of the screen, right-click , and click **Demographics: Change Report**.



3. Click a report from the list, and click **Select**.




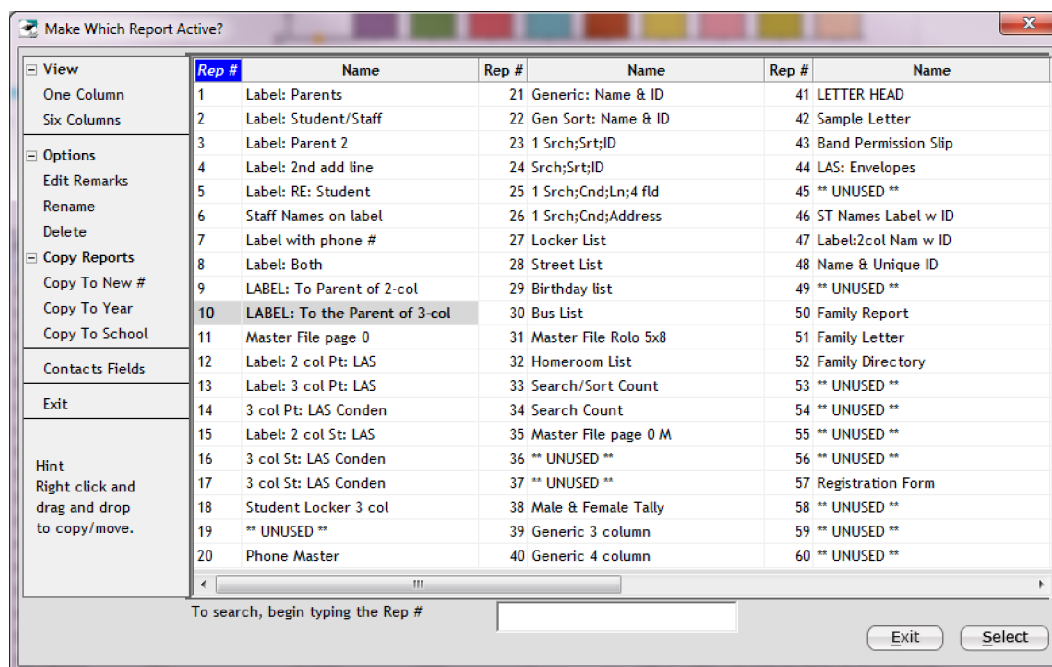
4. To generate this default report, click , or press **F9** on your keyboard.

3.7 Print Labels


When you need to send letters to parents, handwriting labels for all the students in your school can be tedious. AdminPlus offers a customizable report to print multiple labels at once, so you can have quick access to labels whenever you need to send mail to students' homes.

Print Labels for Parents

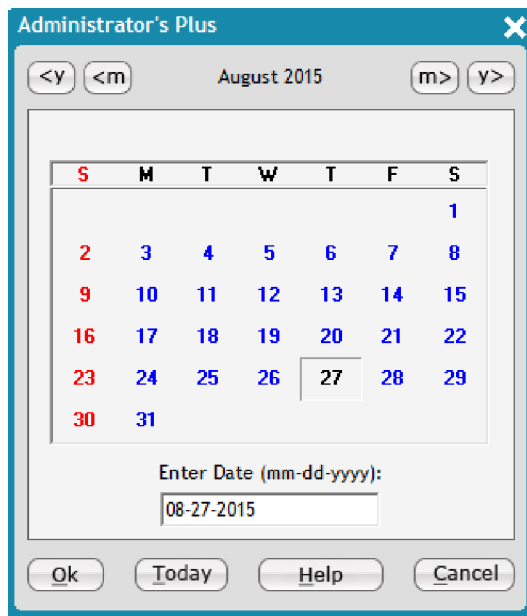
1. In **Data Base**, click **DB RW**.
2. In the **Specifications: Data Base Report Writer** dialog box, configure the following settings:
 - **Active Letter/Report:** Click  next to the text box, click **10 LABEL: To the Parent of 3-col**, and click **Select**.



- **Include Active/Inactive Students:** Click **Active Students Only**, **Active and Inactive Students**, or **Inactive Students Only**, depending on which type of students you want to include.
- **Include Blank Search/Sort Categories:** Click **Include** to include blank entries, or click **Do NOT Include** to only show entries with data.
- **Start Grade For All Grades:** Click the beginning grade where you want to start your report from the drop-down list.
- **End Grade for All Grades:** Click the last grade where you want to end your report from the drop-down list.

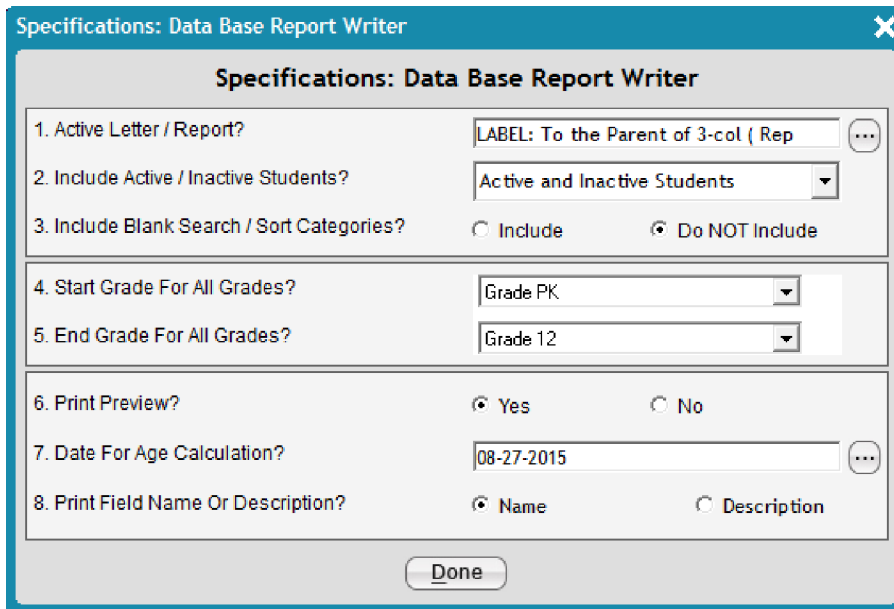
- **Print Preview:** Choose whether or not you want to view a print preview of your report.
- **Date for Age Calculation:** Click  to set the date as of which you want the ages calculated.

Tip: Set today's date if you want to know how old students are today.








The dialog box is titled "Administrator's Plus" and shows a calendar for August 2015. The calendar grid has days of the week as headers (S, M, T, W, T, F, S) and dates 1 through 31. The date 27 is selected. Below the calendar is a text field labeled "Enter Date (mm-dd-yyyy):" containing "08-27-2015". Navigation buttons include "<y", "<m", "m>", and "y>". At the bottom are "Ok", "Today", "Help", and "Cancel" buttons.

- **Print Field Name or Description:** Click the field name or the field description to display in the report.



The dialog box is titled "Specifications: Data Base Report Writer". It contains eight numbered settings:

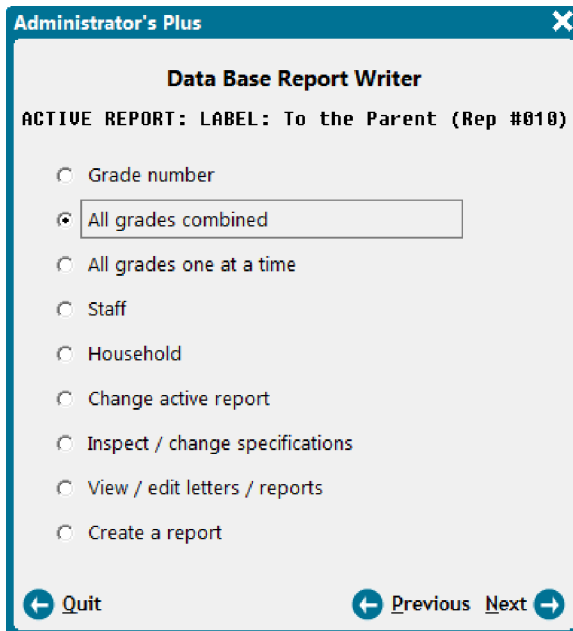
1. Active Letter / Report?: LABEL: To the Parent of 3-col (Rep 
2. Include Active / Inactive Students?: Active and Inactive Students 
3. Include Blank Search / Sort Categories?: ☐ Include ☒ Do NOT Include
4. Start Grade For All Grades?: Grade PK 
5. End Grade For All Grades?: Grade 12 
6. Print Preview?: ☒ Yes ☐ No
7. Date For Age Calculation?: 08-27-2015 
8. Print Field Name Or Description?: ☒ Name ☐ Description

A "Done" button is at the bottom.

3. Click **Done**.

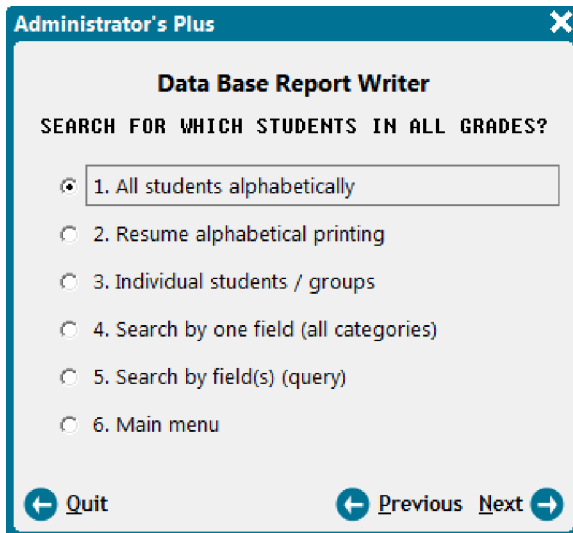
4. Click **All grades combined** to display all students in the grades you selected, and click **Next**.

Tip: You can click other options in the **Administrator's Plus Data Base Report Writer** dialog box, depending on what you want to display in your report.




The dialog box is titled "Administrator's Plus" with a close button (X) in the top right corner. The main title is "Data Base Report Writer". Below it, the text "ACTIVE REPORT: LABEL: To the Parent (Rep #010)" is displayed. A list of options follows, each with a radio button: "Grade number", "All grades combined" (which is selected), "All grades one at a time", "Staff", "Household", "Change active report", "Inspect / change specifications", "View / edit letters / reports", and "Create a report". At the bottom, there are three buttons: "Quit" with a left arrow, "Previous" with a left arrow, and "Next" with a right arrow.

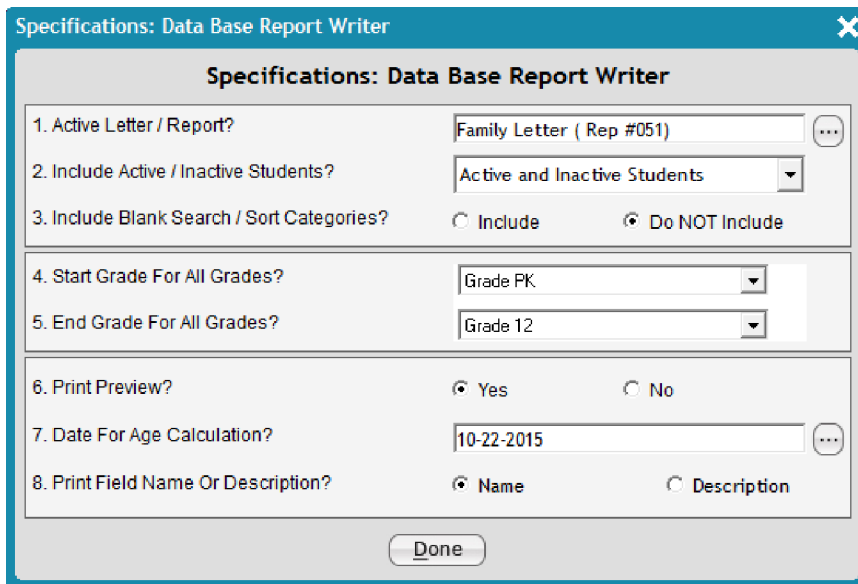
5. Click **1. All students alphabetically** to display the students in alphabetical order, and click **Next**.



The dialog box is titled "Administrator's Plus" with a close button (X) in the top right corner. The main title is "Data Base Report Writer". Below it, the text "SEARCH FOR WHICH STUDENTS IN ALL GRADES?" is displayed. A list of options follows, each with a radio button: "1. All students alphabetically" (which is selected), "2. Resume alphabetical printing", "3. Individual students / groups", "4. Search by one field (all categories)", "5. Search by field(s) (query)", and "6. Main menu". At the bottom, there are three buttons: "Quit" with a left arrow, "Previous" with a left arrow, and "Next" with a right arrow.

Print One Label Per Family

1. In **Data Base**, click **DB RW**.
2. Click  next to the **Active Letter/Report** text box, choose your desired letter or report, and click **Select**.

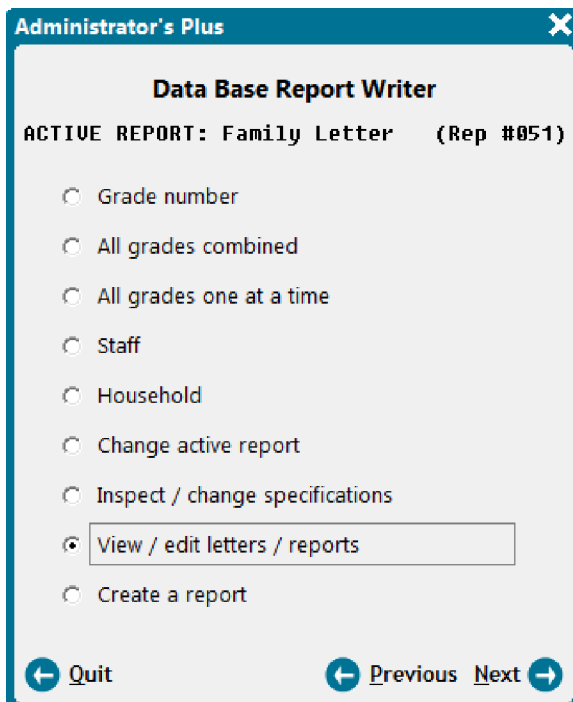


The dialog box titled "Specifications: Data Base Report Writer" contains the following settings:

- 1. Active Letter / Report?: Family Letter (Rep #051) (dropdown menu with ellipsis)
- 2. Include Active / Inactive Students?: Active and Inactive Students (dropdown menu)
- 3. Include Blank Search / Sort Categories?: ☐ Include ☒ Do NOT Include
- 4. Start Grade For All Grades?: Grade PK (dropdown menu)
- 5. End Grade For All Grades?: Grade 12 (dropdown menu)
- 6. Print Preview?: ☒ Yes ☐ No
- 7. Date For Age Calculation?: 10-22-2015 (text box with ellipsis)
- 8. Print Field Name Or Description?: ☒ Name ☐ Description

A "Done" button is located at the bottom center.

3. Click **Done**.
4. Click **View / edit letters / reports**, and click **Next**.

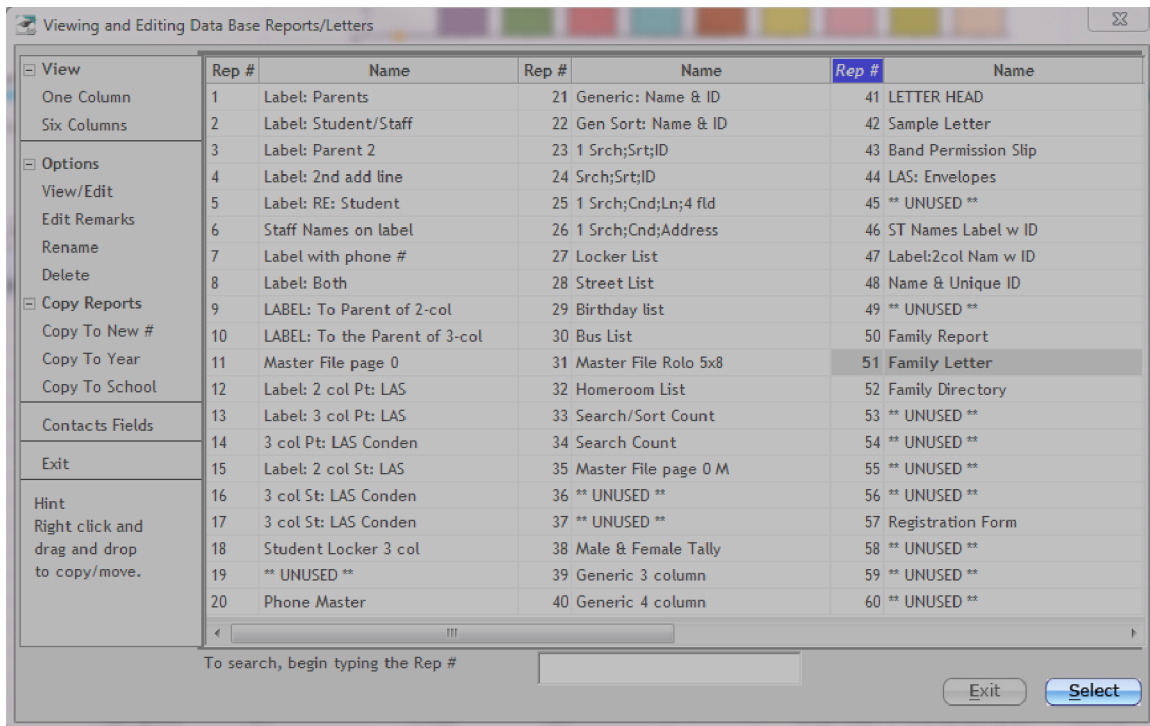


The dialog box titled "Administrator's Plus" with subtitle "Data Base Report Writer" shows the "ACTIVE REPORT: Family Letter (Rep #051)". It contains a list of options with radio buttons:

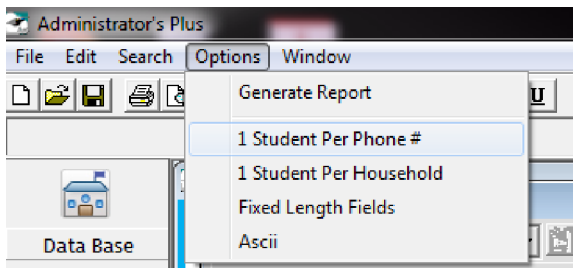
- ☐ Grade number
- ☐ All grades combined
- ☐ All grades one at a time
- ☐ Staff
- ☐ Household
- ☐ Change active report
- ☐ Inspect / change specifications
- ☒ View / edit letters / reports (highlighted with a text box)
- ☐ Create a report

At the bottom, there are navigation buttons: "Quit" (with a left arrow), "Previous" (with a left arrow), and "Next" (with a right arrow).

- Click **Select**.



- Once the report code is generated, click **Options** on the menu bar, and then click **1 Student Per Phone #**.



- Click **Accept** at the bottom right of the report.

Page left blank intentionally.



CHAPTER 4

Manage Portfolios

4.1 Add a New Item to the Portfolio	64
4.2 Add a Report to the Portfolio	66
4.3 Edit Portfolio Document Permissions	69
4.4 Sync Portfolio Documents with PlusPortals	71

4.1 Add a New Item to the Portfolio

Using the portfolio feature, your school can upload documents for parents, students, and teachers. After adding items to the portfolio, you have the flexibility to customize who can access each item. For more information on managing portfolio permissions, see the topic "Edit Portfolio Document Permissions" on page 69.

1. On the Demographics screen, click a student, and click .
2. Click **Add New [F2]**.
3. Select a file on your computer.
4. Add a **Description** and any **Remarks** in their respective boxes.
5. Click  to choose the date if the date is different than the present day.
6. Do either of the following:
 - Click a category from the **Category** drop-down list.
 - Click **Add New**, click **Add [F2]** in the **Portfolio Category** dialog box, enter the name of the new category, click **Save [F10]**, click **Done**, and then click the category from the **Category** drop-down list.
7. To assign other AdminPlus users as **Co-Owners**, select the check box(es) next to any users' names.

7. Co-Owner?

User Name
<input type="checkbox"/> JOHN
<input type="checkbox"/> JZTECH
<input checked="" type="checkbox"/> KELLEYD
<input checked="" type="checkbox"/> LAWRENCE
<input type="checkbox"/> LOUIE
<input type="checkbox"/> MARC
<input checked="" type="checkbox"/> OLIVIA

Note: A Co-Owner can access, edit, and delete this portfolio item. You may assign more than one other Co-Owner to an item.

8. To set Parent, Teacher, or Student visibility, do either of the following in the respective area:
 - Click **Visible** to allow all parents, teachers, and/or students to access this item.
 - Click **Not Visible** to restrict all parents, teachers, and/or students from accessing this item.

The following figure illustrates steps 8–10.

7. Visibility?

Parent Visibility <input type="radio"/> Visible <input checked="" type="radio"/> Not Visible	Teacher Visibility <input checked="" type="radio"/> Visible <input type="radio"/> Not Visible
AP User Visibility <input checked="" type="radio"/> Default <input type="radio"/> Always Visible <input type="radio"/> Not Visible	Student Visibility <input type="radio"/> Visible <input checked="" type="radio"/> Not Visible

9. To set AdminPlus user visibility, do one of the following:

- Click **Default** to give each AdminPlus user the visibility that was assigned to his or her user rights.

Note: For more information on setting user rights, see the topic "Edit User Rights" on page 35.

- Click **Always Visible** to allow AdminPlus users to access this item.
- Click **Not Visible** to restrict all AdminPlus users from accessing this item.

10. Click **Done**.

4.2 Add a Report to the Portfolio

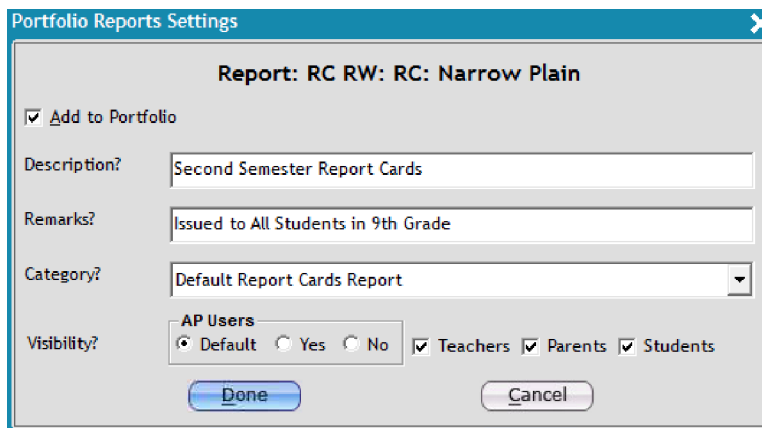
The portfolio can store documents as well as reports that are generated directly in AdminPlus. For your convenience, you can configure a report to be added to the portfolio immediately, upon generating the report. You only need to enable this report feature once for every report you want to add to the portfolio, unless the information about the report changes.

Enable a Report for the Portfolio

Instead of generating a report, saving it on your computer, and manually adding the document to the portfolio, you can save time by adding the report to the portfolio immediately after the report is generated.

1. Generate the desired report.
2. In the **Print** menu, click **Portfolio Reports Settings**, and then click a report writer.
3. Click a report, and click **Select**.
4. In the **Portfolio Reports Settings** dialog box, select the **Add to Portfolio** check box.

The following figure illustrates steps 3–8.



5. Add a description and any remarks in the **Description** and **Remarks** boxes.
6. Click the appropriate category from the **Category** drop-down list.
7. To set AdminPlus user visibility, do one of the following:
 - Click **Default** to give each AdminPlus user the respective visibility that was assigned in his or her user rights.

Note: For more information on setting user rights, see the topic "Edit User Rights" on page 35.

- Click **Yes** to allow all AdminPlus users to access this item.
 - Click **No** to restrict all AdminPlus users from accessing this item.
8. Optional: Select the **Teachers**, **Parents**, and/or **Students** check box(es) to grant visibility to the respective group(s) in PlusPortals.
 9. Click **Done**.

You've now enabled reports to be added to the portfolio. Close all remaining dialog boxes and proceed to the section in this topic. If applicable, repeat steps 1–9 for every report you want to enable this portfolio feature for.

Add a Report to the Portfolio

After you've enabled adding a specific report to the portfolio (by following the steps in the previous section of this topic), AdminPlus prompts you to add the report to the portfolio immediately after you add the report.

1. Generate the desired report.

Once the report is generated, the **Add to Portfolio** dialog box appears.

2. Ensure that the information in the **Add to Portfolio** dialog box is accurate, and make any applicable changes if necessary (to the **Description**, **Remarks**, **Category**, and **Visibility** specifications).

The following figure illustrates steps 1–4.

3. Optional: To assign another AdminPlus user as a Co-Owner, select the check box next to that user's name.


Note: A Co-Owner can access, edit, and delete this portfolio item. You may assign more than one other Co-Owner to an item.

4. Select the check box at the bottom of the dialog box to save the Description, Remarks, and Category as the default for this specific report.
5. Click **Yes**.

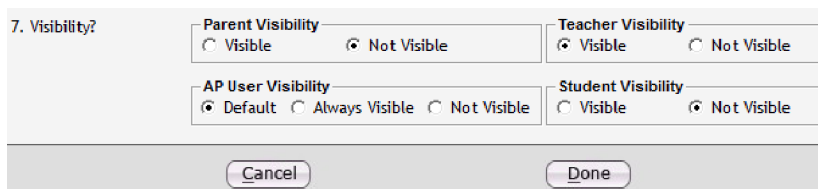
4.3 Edit Portfolio Document Permissions

You can give parents, students, teachers, or other AdminPlus users the permission to view a selected student's portfolio items, or you can restrict any of these users from seeing the portfolio items. You can edit the visibility of one portfolio item, or multiple items at once to save time.

Edit the Visibility of One Portfolio Item

1. On the Demographics screen, click a student, and then click .
2. Click an item, and then click **Properties [F3]**.
3. To set Parent, Teacher, or Student visibility, do either of the following in the respective area:
 - Click **Visible** to allow access to this item.
 - Click **Not Visible** to restrict all access to this item.

The following figure illustrates steps 4–6.




7. Visibility?	Parent Visibility <input type="radio"/> Visible <input checked="" type="radio"/> Not Visible	Teacher Visibility <input checked="" type="radio"/> Visible <input type="radio"/> Not Visible
	AP User Visibility <input checked="" type="radio"/> Default <input type="radio"/> Always Visible <input type="radio"/> Not Visible	Student Visibility <input type="radio"/> Visible <input checked="" type="radio"/> Not Visible
<input type="button" value="Cancel"/>		<input type="button" value="Done"/>

4. To set AdminPlus user visibility, do one of the following:
 - Click **Default** to give each AdminPlus user the visibility that was assigned to his or her user rights.

Note: For more information on setting user rights, see the topic "Edit User Rights" on page 35.

- Click **Always Visible** to allow all AdminPlus users to access this item.
 - Click **Not Visible** to restrict all AdminPlus users from accessing this item.
5. Click **Done**.

Edit the Visibility of Multiple Portfolio Items

- On the Demographics screen, click a student, and then click .
- Do either of the following:

- To select several portfolio items that are in order, press and hold **Shift** on your keyboard, and then click the first and last item.

(All)					(All)	(All)	(All)
#	Visibility				AP/ID	Name	Description
	P	S	T	AP			
1	N	N	N	N	0K002	Baldwin; Matthew	3 ATT Letter with Table
2	N	Y	Y	N	0K002	Baldwin; Matthew	Report Card
3	N	N	N	D	0K002	Baldwin; Matthew	3 ATT Letter

- To select items that aren't in order, press and hold **Ctrl** on your keyboard, and click each desired item.
- Once all desired items are selected, click **Parent Visibility**, **Student Visibility**, **Teacher Visibility**, or **AP User Visibility**, and then click **Visible** or **Not Visible**.


PDF	Third Quarter 2005	SUPERVISOR
PDF	Third Quarter 2005	SUPERVISOR
PDF	Third Quarter 2005	SUPERVISOR

☐ View My Documents

Note: Click **Visible** to allow access, and click **Not Visible** to restrict access.

- Confirm the message.

Administrator's Plus



INFORMATION

CHANGING DOCUMENT VISIBILITY

If you continue, all the selected items will be VISIBLE to PARENTS


Do you want to change the visibility?

4.4 Sync Portfolio Documents with PlusPortals

After adding any desired items to the portfolio, you can send the items to PlusPortals so that teachers, parents, and/or students can view them (if the respective group has been granted access). For more information on adding portfolio items, see the topic "Add a New Item to the Portfolio" on page 64. For more information on granting or restricting portfolio access, see the topic "Edit Portfolio Document Permissions" on page 69.

1. In the **Tools** menu, click **TeacherPlus Setup & Sync Manager**.
2. In the SEND TO PLUSPORTALS area, click **Portfolio Items**.

TEACHERPLUS SETUP <ul style="list-style-type: none">• Cloud Settings• Demographic Fields	TEACHERPLUS TOOLS <ul style="list-style-type: none">• Manage Users• Send (Sync) Settings• Create New Year
SEND TO TEACHERPLUS <ul style="list-style-type: none">• All Data (Since Year Start)• Changes Only (Since Last Send)	SEND TO PLUSPORTALS <ul style="list-style-type: none">• Grades & Narratives• Portfolio Items• Online Forms User Accounts
SEND TO EDLINE <ul style="list-style-type: none">• TeacherPlus Progress Reports	LUNCH COUNTS <ul style="list-style-type: none">• Enable Lunch Counts• Setup Lunch Counts• Receive Lunch Counts

3. Click  to set the date that you want to send portfolio items after.

Example

If you want to send all portfolio items to PlusPortals, set the date to the day before items began being added to the portfolio. For example, to send all documents since May 2015 until today, we would set the date to the last day of April, 2015 or **04-30-2015**.

4. Select the check box(es) next to any applicable categories.
5. Select the **Delete all the previously sent Portfolio Documents when 'Sync: Complete' option is used** check box to replace all existing documents in the E-Portfolio of the PlusPortals with the documents being synced.
6. Click **Sync**, and then click **Sync Complete**.



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