Solutions to MT Edition Training Activities

Navigation and Search Activities

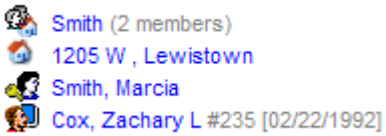
Activity 1 Solution

Navigate or find each item listed. Write down the steps you took to locate this information in the Montana Edition and answer the questions. (User Guide Pages 10 - 15)

1. Find a Household named Smith with 1 student and 1 guardian. Write down how you located this Household and one piece of information that is missing from this Household.

Answer: Click on the Search tab, select Household, enter Smith, and Click Go. Scroll down until a Household with the name "Smith" with 2 members, a student (person with book icon), and a guardian (person with key icon) is located.

Answer: Street Name is missing in the Address.



2. Determine how many tenth grade boys were enrolled in the high school last year.

Answer: 52 tenth grade boys were enrolled in the 2007-2007 school year.

On the Campus Toolbar select 07-08 from the Year dropdown list and Fergus High School from the School dropdown list. Click on the Search tab, select Student from the dropdown list and Click on Advanced Search. From the Search Criteria available select 11 from the Grade data type and M from the Gender data type then Click Search. Results will display in the Search area of the Outline.

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3. Search for a Household with the name of Xi. How many members are in this Household?

Answer: 4 members

Click on the Search Tab, select Household, enter Xi%, and click Go

Note: 3 characters are required when conducting a Household search; therefore a wildcard search is needed.

4. Navigate to the screen for the mother of Ken Beasley to enter her work phone number. On what Student Information tab will her work phone number display for easy access to most Campus users?

Answer: Summary Tab
Path: Student Information > General > Summary

Click on the Search Tab, select Household, enter Beasley, and click Go. Select the link in the Household for Margaret Beasley. On the Demographics tab for Margaret Beasley, scroll down to the Personal Contact Information editor. Enter a Work phone number. Click on the Search Tab, select Student, enter Beasley, Kenneth, and Click Go. The Summary tab displays the work number entered next to Margaret Beasley in the Beasley Household **Primary section.

Activity 2 Solution

1. On what three tabs is state reporting data entered for a student? Write down the navigation path to each tab.

Answer: Enrollment tab
Path: Student Information > General > Enrollments or Path: Census > People > Enrollments

Answer: Programs tab
Path: Student Information > General > Programs

Answer: Demographics tab
Path: Census > People > Demographics

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2. What is the main purpose of the Campus Toolbar?

Answer: The Campus Toolbar provides the dropdown lists needed to narrow down the search of specific data types to a selected Year, School, Calendar, and/or Schedule.

3. Is Census information school or district based? How do you know?

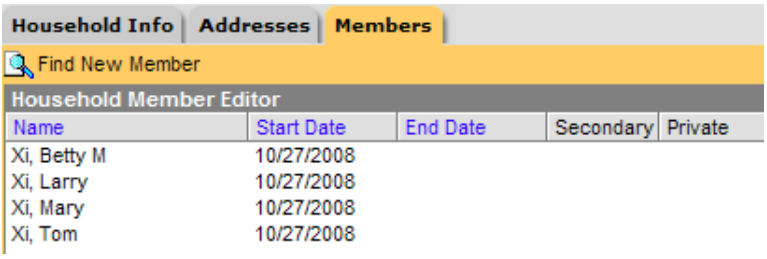
Answer: Census information is district based. When searching for People, Households, or and Addresses the system returns all choices based on the criteria entered regardless of the selections made on the Campus Toolbar.

Activity 3 Solution

Navigate or find each item listed. Write down the steps you took to locate this information in the Montana Edition and answer the questions. User Guide Pages (10, 16, 19 - 22, 33)

1. What information is listed on the Members tab for a Household?

Answer: A list of members in the Household



Name	Start Date	End Date	Secondary	Private
Xi, Betty M	10/27/2008			
Xi, Larry	10/27/2008			
Xi, Mary	10/27/2008			
Xi, Tom	10/27/2008			

2. Explain two ways to find a student's primary guardian(s) contact information.

Answer (Method 1): Click on Search, Select Student, enter the last name, first name of the student, click on the link for the student, and navigate to the student's Summary tab.

Answer (Method 2): Click on Search, select Household, enter the last name, first name of the student, click on the link for student's guardian(s), navigate to the guardian(s) demographic tab, and scroll to the guardian's Personal Contact Information.

3. Give an example of a Non-Household Relationship.

Answer: An Emergency Contact for a student.

4. List 4 types of people that could be entered in the Montana Edition.

Answer: Student, Guardian, Staff Person, and Emergency Contact.

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Census Activities

Activity 4 Solution

Create the following people in the Montana Edition and assemble a Household for this family. User Guide Pages (23 - 34)

- 1 Eighth grade student new to the State
- 1 Kindergarten student new to the State
- 2 adults, 1 mother and 1 dad
- Build appropriate relationships
- Provide work numbers and emergency contact information

Answer:

1. **Add students and enrollment records using the Student Locator (User Guide Pg. 25).**
2. **Add the 2 adults using the Add Person tool in the Census Module (User Guide Pg. 28).**
3. **Add Personal Contact Information on the demographics tab for each adult (User Guide Pg 34).**
4. **Add the address for the family using the Add Address tool in the Census Module (User Guide Pg 29).**
5. **Assemble the Household using the Census Wizard (User Guide Pgs. 31 – 33).**
6. **Build relationships on the third screen of the Census Wizard (User Guide Pg. 32).**

Activity 5 Solution

Create the following staff in the Montana Edition. User Guide Pages (39 - 41)

- 1 high school classroom teacher and contact information
- 1 special education case manager that services students at both the elementary and the middle school.

Make sure to add an appropriate District Employment and Assignment(s) records for each staff person.

Answer:

1. **Add the 2 staff persons using the Add Person tool in the Census Module (User Guide Pg. 39).**
2. **Add a District Employment Start Date for each staff person.**
3. **Add one District Assignment at the high school for teacher (User Guide Pg. 40).**

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Activity 6 Solution

Add the following people to the Montana Edition and place them in the Household assembled in Activity 4. User Guide Pages (23 - 34)

- Locate a student from another district using the Student Locator.
- Request a Record Transfer for this student.
- Add this student to the Household assembled in Activity 4. **Note: The parents in this Household are the foster parents of this student.**
- The grandmother of this student is the emergency contact. The grandmother does not live with the student.
- Add the grandmother as a person to the database.
- Enter a work number and an email address for the grandmother.
- Build appropriate relationships.

Answer:

1. **Find and add a transfer student and enrollment record using the Student Locator (User Guide Pg. 26).**
2. **Submit a records request on the next screen that displays or by navigating to the Records Transfer tab in Student Information > General (User Guide Pg. 26).**
3. **Add the grandmother using the Add Person tool in the Census Module (User Guide Pg. 28).**
4. **Enter Personal Contact Information for the grandmother on her demographics tab (User Guide Pg 34).**
5. **Navigate to the Census Wizard in the Census Module and search for the Household Name from Activity 4 and select the Household link to move the Household to the "the Editing an Existing Household" area on the first screen (User Guide Pgs. 31 – 33).**
6. **On the first screen of the Census Wizard search for the last name of the transfer student and select the student's link located under the People not in Households title in the Outline to move the transfer student into this Household (User Guide Pg. 31).**
7. **Save and Continue to Step 2 in the Census Wizard and enter a Start Date for the transfer student (User Guide Pg. 32).**
8. **Save and Continue to Step 3 in the Census Wizard, build a Guardian relationship between the transfer student and the adults in this household (User Guide Pg. 32).**
9. **Click Save & Done.**
10. **Click on the Search tab, select Household, enter the name of the Household from Activity 4, select the link for the transfer student who is a member of this Household, go to the Relationships tab, and add click on Add a new Non-Household Relationship, search for the grandmother added in step 3, select the grandmother from the search window, select the red x in the top right corner of the search screen, enter a Start Date, and Save (User Guide Pg. 33).**

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Activity 7 Solution

The transfer student from Activity 6 has recently been adopted by his foster parents. Add an identity to reflect the legal name change of his foster parents. Search for the student by their previous name, what did you discover? User Guide Page 41

Answer: A search for the student by a previous name still finds the student in the Outline. The student's new name displays.

Path: Census > People > Identities

1. **Click New on the Identities tab**
2. **Enter the student's new last name.**
3. **Enter the student's birth date.**
4. **Select an Effective Date for the identity change.**
5. **Save.**
6. **Click on the Search tab, select student from the dropdown list, enter the student's previous last name, first name, click Go.**
7. **A link with the student's new name will display in the search results of Outline.**

User Security Activities

Activity 8 Solution

Add Read rights to the Programs tab for teachers. User Guide Page 62

Answer: Click on the Search tab, select Group from the dropdown list, and click Go. Select the link for the Teacher group in the search results and navigate to the Tool Rights tab. Expand the Student Information folder, the General, and Summary folders. Next to Programs mark the R check box. Note: To limit teachers to only specific Programs expand the Programs tool.

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Activity 9 Solution

Add a new Tool Rights group for para-professionals that includes the following access to Student Information at the middle school. Name your group <your name> Paras.
User Guide Page 63

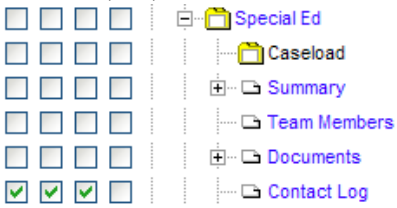
- Read Only access to the Student Summary tab
- Read Only access to the Student Enrollment tab
- Unfiltered Student Search
- Read, Write, and Add access to the Contact Log in Special Education

Answer:

1. **Click on the Search tab, select Group from the dropdown list, and Click Go.**
2. **Select the first result, Create a new User Group, in the Outline. User Guide Page 63.**
3. **Enter "Paras" in the User Group Name field.**
4. **Click on Create Group.**
5. **Navigate to the Tool Rights tab of Para's group.**
6. **Expand the Student Information and General tools.**
7. **Mark the R check box next to the Summary and Enrollment tools.**

8. **Mark R, W, A, D next to the Unfiltered Search tool**

9. **Expand the Student Information and Special Education folders.**
10. **Select R, W, A next to the Contact Log.**



11. **Click Save.**

Activity 10 Solution

In preparation for the next school year, modify the next years Calendar group and provide rights to the Master Schedulers. Write down what needs to change on the next Years Calendar group. User Guide Page 61

Answer:

1. **Click on the Search tab, select Group from the dropdown list, and Click Go.**
2. **Select a Calendar group that starts that start with a "+" sign (e.g. +FHS).**

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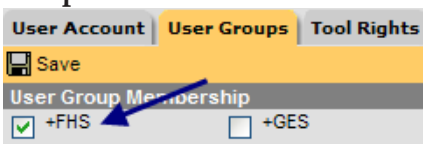
3. **Click on the Calendar Rights tab.**
4. **Select the link in the workspace of this tab or click New if no data exists.**
5. **Select 09-10 from the Year dropdown list.**
6. **Select the 09-10 FHS Calendar from the Calendar dropdown list. User Guide Pg 61.**

7. **Repeat steps 1 – 6 for all Calendars that start with a "+" sign.**
8. **Click Save.**
9. **Click on the Search tab, select Users from the dropdown list, and enter the last name, first name of a Master Scheduler, and Click Go.**
10. **Select the gray link for this User and the User Groups link. User Guide Pg. 66**
11. **Mark the Calendar group checkbox that represents next year and the correct calendar for this person.**



12. **Repeat steps 8 – 10 for all Master Schedulers.**

Activity 11 Solution

Add the following User Account:
User Guide Pages (63 - 66)

- Add a User Account for one staff member from Activity 5.
- Provide access to appropriate Calendar and Tool Right groups for this person.
- Log in as this staff person to verify the setup of the account.

Answer:

1. **Click on the Search tab, select Users from the dropdown list, and enter the last name, first name of the staff person, and Click Go.**
2. **Select the link for this person; provide a User Name and Password. User Guide Pg. 63**
3. **Mark the appropriate Tool and Calendar group checkboxes this person should have access to in the Montana Edition. User Guide Pg. 64**
4. **Click Save.**
5. **Select the User Account tab.**
6. **Select the Login As User to verify the account. Note: If there is no Log Off button return to the User Groups tab for this person and Mark the All Users group.**

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