

User Guide





Information in this document is subject to change without notice and does not represent a commitment on the part of Accelerated Christian Education. The software described in this document is furnished under a license agreement and may only be used or copied in accordance with the terms of the agreement.

aceconnect is a trademark of Accelerated Christian Education.

Microsoft is a trademark of Microsoft Corporation in the United States of America and other countries.

Adobe Acrobat Reader is a trademark of Adobe Corporation in the United States of America and other countries.

© 2014 Accelerated Christian Education, Inc. All Rights Reserved.



Table of Contents

	6
Welcome	
Common Features and Elements	
INSTALLATION SECTION	
Hardware Requirements	
Software Requirements	
Installation Prerequisites	
Download Steps	
Server Installation	
Client Installation	
Server and Client Installation on a Single Computer	
LOGIN/GETTING STARTED SECTION	
Login	
Getting Started	14
Download the License	
Update the Catalog	
SETUP SECTION	
School Configuration	
Academic	
Billing	18
Contact	18
Inventory	
School	
Academic Year	
Roles and Permissions	
Rooms	
Staff and Users	
Subject Types	
Subjects	
High School Subjects	
Grade Conversions	
Courses of Study/Graduation Requirements	
Grade Types	
Standardized Testing	
Desirable Traits	
Relationship Types	
Note Types	
Billing Plan	
STMS DATA IMPORT SECTION	
Preparation	
Selecting a Backup from School of Tomorrow Management System	
Running the Data Import	
Start the Import	
Step 1 – Select Data	
Step 2 – Select Families and Students to Import	
Step 3 – Import	
Step 4 – Review	
Follow-Up	
HOME SECTION	
Help Panel	
Dashboard	
Resources	
Find People	
Backup/Restore	
Shutdown	43



Portal Settings	
FAMILIES SECTION	
Browse Families	
Adding a Family	
Editing a Family	
Deleting a Family	
STUDENTS SECTION	
Progress Control	
Editing Items in Progress Control	
Adding Basic Literature 7 and 8 to Progress Control	
Quick Score Entry	
Academic Projection	
Assigning a Course of Study	
Graduation Requirements	
Kindergarten	
Kindergarten Lessons	
ABCs	
ABCs Lessons	
Post Test	
Attendance	
Goal Check	
Entering Attendance Information	
Entering Goal Check Information	
Adding a Homework Assignment	
Goal Notes	
Homework Assignment	
Merits and Demerits	
Scripture Memory	
Desirable Traits	
Standardized Testing	
Privilege Status	
Browse Students	
Adding a Student	
Editing a Student	
Deleting a Student	
BILLING SECTION	72
Balances	
Balances Transactions	73
Balances Transactions Adding a Manual Transaction	73 73
Balances Transactions Adding a Manual Transaction Viewing Transactions	73 73 74
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction	73 73 74 74
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction	
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees	
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs	
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans	
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions	
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions INVENTORY SECTION	73 74 74 74 74 74 75 75 75 76 77 77 80
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions INVENTORY SECTION Orders	73 74 74 74 74 75 75 75 76 77 77 80 80
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Runs Billing Plans Batch Transactions INVENTORY SECTION Orders Filtering Orders	73 74 74 74 74 74 75 75 75 76 76 77 77 80 80 80
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Runs Billing Plans Batch Transactions INVENTORY SECTION Orders Filtering Orders Creating an Automatic Order	
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Billing Plans Batch Transactions INVENTORY SECTION Orders Filtering Orders Creating an Automatic Order Creating a Manual Order	
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions Inventory Section Orders Filtering Orders Creating an Automatic Order Creating a Manual Order Uploading a Manual Order File	
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions Inventory Section Orders Filtering Orders Creating an Automatic Order Creating a Manual Order Uploading a Manual Order File Editing an Order	73 73 74 74 74 74 75 75 75 75 76 76 77 80 80 80 80 80 80 80 82 84 84 84
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions Inventory Section Orders Filtering Orders Creating an Automatic Order Creating an Automatic Order Creating a Manual Order Uploading a Manual Order File Editing an Order Deleting an Order	73 74 74 74 74 74 75 75 75 76 76 77 80 80 80 80 80 80 80 82 84 84 84 84 84 84
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions INVENTORY SECTION Orders Filtering Orders Creating an Automatic Order Creating a Manual Order Uploading a Manual Order File Editing an Order Deleting an Order Deleting an Order Receive Order	73 74 74 74 74 74 75 75 75 76 76 77 80 80 80 80 80 80 80 82 84 84 84 84 84 85
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions INVENTORY SECTION Orders Filtering Orders Creating an Automatic Order Creating a Manual Order Uploading a Manual Order File Editing an Order Deleting an Order Receive Order Browse Inventory	73 74 74 74 74 74 75 75 75 76 76 77 77 80 80 80 80 80 80 82 84 84 84 84 85 85 85
Balances Transactions Adding a Manual Transaction Viewing Transactions Reversing a Transaction Deleting a Transaction Miscellaneous Fees Billing Runs Billing Plans Batch Transactions INVENTORY SECTION Orders Filtering Orders Creating an Automatic Order Creating a Manual Order Uploading a Manual Order File Editing an Order Deleting an Order Deleting an Order Receive Order	73 74 74 74 74 74 75 75 76 76 77 76 77 80 80 80 80 80 80 80 80 80 80 80 80 80



Assigning and Reassigning Inventory	86
Unassigning Inventory	
Changing Inventory Status	86
Suppliers	
Catalog	
Subject Ordering Rules	
REPORTS SECTION.	
IPAD APPLICATION	89
Logging In and Out	
Student Goals and Homework	
Homework Slips	89
Attendance	
Review Items	
Details	91
Notes	91
Homework	91
Photos	91
RELEASE HISTORY	92





Introduction

Welcome

Welcome to aceconnect School Management. This *User Guide* will explain concepts and application operations to help use the software in your school.

Should you experience difficulty during the installation or with program operation, you may contact our Technical Support team at **615-612-5288**. You may also email **technicalsupport@aceministries.com**.

Common Features and Elements

Throughout the application, certain common features and elements are used. Understanding these features and elements will help you use the software more effectively.

Menu Bar

The menu bar is a container for various action buttons used throughout School Management. Some common action button types are:

Clickable Buttons – New, Edit, Delete, Print, etc.

Toggle Button – Toggles between an On and Off status

Dropdown List – Allows selection from a list

Date Dropdown – Allows manual entry of a date or selection of

a date from a calendar

Filter Button – Sets a filter for a grid

Refresh Button – Refreshes the current display by reloading the

data

🕂 New 🖉 Edit 💢 Delete 🛛 Acad. Year 2014-2015 🛛 🖓 🗸 🌊



Data Grid

Grid elements are used to display data on many screens. Select an item in the grid by clicking on the row.

Sort any grid by clicking on the name of any column.

Filter any grid by clicking the **Filter** button in the menu bar (if available).

Filter any grid by column values by clicking on the small filter button on the upper right corner of any column. From the filter menu displayed, choose **All**, **Blanks**, **Nonblanks**, **Custom**, or any row value to filter the data displayed in the grid.

半 Highlan	d School				Version: 1.0.5120
					User: adm
milies	🚽 🕂 New Family Wizard 🥖 E	dit 💢 Delete 🛛 🥭			Run Report
Browse Families	Billing Name	Billing Plan	Primary Person	Secondary Person	Custom
	Jones, Mr. Daniel	Standard	Jones, Mr. Daniel H.	Jones, Mrs. Ruth A.	(Blanks) ress
	Lovejoy, Mr. Robert and Mrs	Church Member	Lovejoy, Mr. Robert	Lovejoy, Mrs. Rachel	(Non blanks)
	McMercy, Mr. John and Mrs.	Sa Standard	McMercy, Mr. John	McMercy, Mrs. Sarah	Jones, Mrs. Ruth A. Lovejoy, Mrs. Rachel
	Upright, Mr. Charles and Mrs	Church Member	Upright, Mr. Charles	Upright, Mrs. Alice	McMercy, Mrs. Sarah
	Virtueson, Mr. David and Mrs	Church Member	Virtueson, Mr. David	Virtueson, Mrs. Faith	Upright, Mrs. Alice Virtueson, Mrs. Faith
me milies					
niles idents					
entory					
ports					
tup					



CHAPTER 2

Installation Section

School Management consists of two main components—a server component (Windows® service) and a client component. These components can be installed in a network configuration (a server computer and one or more client computers) **or** in a single configuration (both the server and the client components on a single computer).

Hardware Requirements

	Client (minimum)	Server (minimum)	Server (recommended)
Processor	800 MHz or faster	1GHz or faster	1GHz or faster dual core processor
Memory	512MB	2GB	4GB+
Hard Drive	Any	100GB	250GB+

Software Requirements

Required software must be in place before School Management can be installed. Below are the software requirements for both the server and client computers if installed separately. If installed on a single computer, the server requirements are recommended.

Server

Microsoft® Windows® 8, Microsoft® Windows® 10, or Microsoft® Windows Server® 2008-SP1 (or any higher version)

Adobe® Acrobat® Reader® (for viewing the User Guide)

Client Microsoft® Windows® 8, Microsoft® Windows® 10

Adobe® Acrobat® Reader® (for viewing the User Guide)



Installation Prerequisites

Listed below are prerequisites that need to be installed in order to run School Management. If you have Internet access and the computer is current with all Microsoft updates, these prerequisites will be installed when running the School Management installation.

If you do not have Internet access, you will need to manually download these prerequisites from Microsoft, copy them to your computer, and install them before running the School Management installation.

- <u>To install .NET Framework 3.5 in Windows 8.1 or</u> <u>Windows 10:</u>
 - Holding the Windows key on your keyboard, press the S key for a search box.
 - $\circ~$ In the Search box, type the word features.
 - Select **Turn Windows features on or off** from the options found.
 - Click the [+] beside the checkbox for .NET
 Framework 3.5 (includes .NET 2.0 and 3.0). It is usually the top entry on the list.
 - Check all the boxes that expand below it to set the main box as checked.
 - Click **OK** to allow Windows to activate the .NET framework. May require a download and/or a Windows restart.
- <u>To install Microsoft SQL Server 2012 Express 32-bit</u> (only needed for the School Management server installation)
 - <u>https://www.microsoft.com/en-</u> us/download/details.aspx?id=43351



Choose the download you want	
File Name	Size
ENU\x64\SQLEXPR_x64_ENU.exe	132.3 MB
ENU\x64\SQLEXPRADV_x64_ENU.exe	1.3 GB
ENU\x64\SQLEXPRWT_x64_ENU.exe	669.9 MB
ENU\x64\SqlLocalDB.MSI	33.0 MB
ENU\x64\SQLManagementStudio_x64_ENU.exe	600.2 MB
ENU\x86\SQLEXPR_x86_ENU.exe	116.7 MB

 During the installation for SQL Server, you can accept all default settings except on the Instance Configuration screen, where you will choose a named instance and type the name sms.

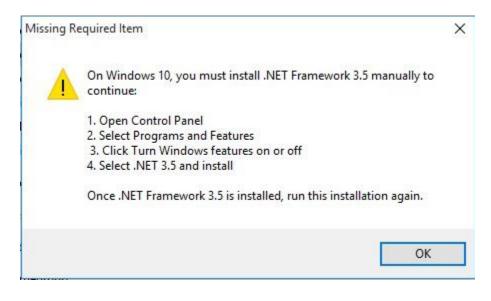
Instance Configuration		
Specify the name and instance ID	for the instance of SQL Ser	ver. Instance ID becomes part of the installation path.
Setup Support Rules Installation Type License Terms Feature Selection Installation Rules	© <u>D</u> efault instance N <u>a</u> med instance: Instance <u>I</u> D:	sms
Instance Configuration Disk Space Requirements	Instance <u>r</u> oot directory:	C:\Program Files\Microsoft SQL Server\



Download Steps

- 1. Click the **Download Link** provided in the Registration email and set up your Portal User Name and Password.
- 2. Click Download Installer, then click Run.
- 3. Follow the prompts through the installation process.

NOTE: For Windows 10, you must first install .NET Framework 3.5 manually.



Server Installation

To perform the server installation, choose both **SMS Client** and **SMS Server**. The server component (including database and Windows service) will be installed and started. A program icon will be added to the Start menu.

NOTE: The SMS Server operates in the background of Windows, so the client component is necessary to access the database on that computer.

Client Installation

To perform the client installation, download School Management onto each designated computer. Choose **SMS Client** and continue. A program icon will be added to the Start menu.



Server and Client Installation on a Single Computer

The server and client components can be installed on a single computer. Choose **SMS Client** and **SMS Server**. A program icon will be added to the Start menu.





Login/Getting Started Section

Login

To begin, click the School Management icon in the Start menu.

The client component requires a connection to the server component. The application automatically searches for the server and displays it in the Server dropdown list. Enter the default User Name **admin** and the default Password **admin**. **NOTE:** It is highly recommended that you change the default password the first time you log into School Management.

School Mar	agement - Login	×
Server	DT25377	
User Name		
Password		
		Login
School Mar	agement - Login	×
Server		
	admin	
	admin *****	

Once initialization is complete, the Dashboard screen is displayed.



Getting Started

NOTE: If you have forgotten your Portal User Name or Password, go to <u>www.studentmanage.com.</u> Enter the email address on record for your school, and click **Forgot Password.** Your user name and a temporary password will be sent. To associate your server installation with the Portal account and your A.C.E. account, follow these steps to download the license and update the catalog.

Download the License

Until the license is downloaded, the program will only run in demo mode and will only allow one family to be entered. The steps to activating the license are as follows.

Activating the License with Internet Access

- 1. Open the **Home** menu and click **License**.
- 2. Enter your Portal User Name.
- 3. Click **Change...** to enter your **Portal Password**.
- 4. The word Success should appear in the Portal Account Status box.
- 5. Click **Download License**.
- Log out of School Management and log back in. The school name will now appear in the program. If it is necessary to change the school name for any reason, contact A.C.E. Technical Support at 615-612-5288. You may also email <u>technicalsupport@aceministries.com</u>.

School Management	and the second se		_ 🗆 X
🦇 Highland	School	V	ersion: 1.0.5189 <u>Loqout</u> User: admin
Home	2		Help 🔊
Dashboard Resources Find People	Portal User Name test5070347 Portal Account	t Status Success	About User Guide
Backup/Restore	License Mode School Management School Edition		
Shutdown License	Customer Name Highland School Iss Customer Number 5070347	aued On 10/8/2012	
Portal Settings Home Families			
Students	Click the 'Download License' button to automatically download any available license file. You may need to restart School Management for license changes to ta effect.		
Billing Inventory	errect. Download License		
Reports Setup			

Activating the License without Internet Access

- 1. On a computer with Internet access, log in to the Portal at <u>www.studentmanage.com</u>.
- 2. Click the Licenses tab.
- 3. Click the License link.
- 4. **Save the file** to an external hard drive, flash drive, or other portable device to transport it to the School Management server computer.



- 5. On the computer with the School Management server, **copy the license file** to the program folder.
 - On Windows 64-bit systems the folder is C:\Program Files (x86)\School Management System\
 - On Windows 32-bit systems the folder is C:\Program Files\School Management System\
- 6. Restart the computer.

Be sure to check the Licenses tab periodically at <u>www.studentmanage.com</u> for software updates. Update notifications will also display in School Management at the top right when logged in.

Update the Catalog

When School Management is first installed, it will include the basic A.C.E curriculum catalog. It is important to run a catalog update after the installation is complete. The catalog must be updated from this default catalog for ordering to be possible through School Management. Shipping addresses for your account are included in this download.

Updating the Catalog with Internet Access

- 1. Open the **Home** menu and click **Portal Settings**.
- 2. In the Catalog and Orders section, click Update Now.
- 3. When the update is complete, an entry will appear in the log with a time stamp.

🏁 Highlan	d School	 ersion: 1.0.5189 <u>Logo</u> User: adm
lome	2	Help
Dashboard Resources Find People	Portal Username test5070347 Portal Account Status Success Portal Password Change Parent Portal Status Not Available or Expired	About User Guide
Backup/Restore Shutdown License Portal Settings	Catalog and Orders ✓ Enable Catalog Updates and Electronic Orders Update Daily at [0+00 AM @ (Catalog updates may slow the system and should be performed after hours.) Update Now	
lome	Parent Portal Image: Parent Portal Parent Portal Last Updated at	
amilies	Update Log Saved at 12:51:34 PM	
illing	[CatalogSync] Updated CatalogItem Science Key [CatalogSync] Updated CatalogItem Science Key [CatalogSync] Updated CatalogItem Science Key [CatalogSync] Updated CatalogItem Science Key [CatalogSync] Lotalog on: finited accessful at 44/4/2014 12:51:44 PM	
nventory teports	Lealandsyling Lealands ymru mateirab soccessiung at nyn 2014 223-2147 PM Parenfbortallsyng Attempting to login to portal at 4/4/2014 12:55:47 PM IParenfbortallsyng Attempting to login to portal at 4/4/2014 12:55:49 PM Parenfbortallsyng Attempting to login to portal at 4/4/2014 15:549 PM	

Updating the Catalog without Internet Access

- 1. On a computer with Internet access, log into the Portal at <u>www.studentmanage.com</u>.
- 2. Click the **Updates** tab.
- 3. Click Download Latest Catalog File.



- 4. **Save the file** to an external hard drive, flash drive, or some other portable device to transport it to the School Management computer.
- 5. On the computer with School Management, log into the program.
- 6. Open the **Inventory** menu and click **Catalog**.
- 7. Click **Manual Update** and select the catalog update file that you downloaded from the Internet.



CHAPTER 4

Setup Section

To set up School Management, click Setup in the left panel.

School Management					↔		X
					1	Version: 1.8.6292	Logou
Highland	School					8	User: admir
Setup	Academic					Help	oser, domi
School Configuration	Auto Issue PACE						
School Configuration	High School Avg	Both	PACE	🔘 No	n-PACE	About	
Academic Year	High School Avg Use GPA Weight		0	0		User (Guide
Roles and Permissions	Minimum Score	80 %					
Rooms	Billing				2		
2012/06/07/2	Bill PACEs	Never	When issued	When assigned	When completed		
Staff and Users	PACE Fee (Per PACE)	\$3.00	Unici issued	Unich assigned	Unen completed		
Subject Types	Plus Repeat PACE Fee	\$5.00					
Subjects							
and a second	Plus Percentage of PACE Cost	50.00 %					
Grade Conversions	Contact						
Courses of Study	Fax Mailing Address	555-123-4568 203 S. Commitme					
Grade Types	Mailing Address 2	203 S. Commitme	nt Drive				
reaction and the field of	Mailing Address 2 Mailing City	Highland City					
Standardized Testing	Mailing Country	US					
Desirable Traits	Mailing ZIP/Postal Code	77777					
Relationship Types	Mailing State/Province	Highland					
Make Towns	Phone	555-123-4567					
Note Types	Physical Address	203 S. Commitme	nt Drive				
	Physical Address 2						
	Physical City	Highland City					
	Physical Country	US					
lome	Physical ZIP/Postal Code	77777					
one	Physical State/Province	Highland					
amilies	Inventory						
itudents	Allow Online Ordering	~					
	Order PACEs Ahead	12					
illing	Use Free Floating Mode						
nventory	School						
in circlery	Administrator Name	Pastor John Alltru	ıth				
leports	Logo	No image data				1	
Setup	Physical Address and Mailing Addr	4					

School Configuration

The School Configuration section contains basic school information. Open the page by clicking **Setup.** The default page displays **School Configuration**.

Academic

- Auto Issue PACE Automatically issues the next PACE (if in stock) when a passing score is entered for the student
- High School Avg Controls whether the overall High School Average is calculated using only PACE subjects, only Non-PACE subjects, or both (default)
- High School Avg Use GPA Weight Controls whether the Overall High School Average is calculated using the GPA Weights for each subject (defaults to off)
- Minimum Score The default minimum passing score for any PACE or academic item as established when setting up subjects



Billing

- Bill PACEs Determines when PACEs are billed for each student
- PACE Fee (Per PACE) The amount billed for each PACE issued to a student
- Plus Repeat PACE fee The additional amount billed for each repeat PACE issued to a student
- Plus Percentage of PACE Cost Provides an option to add a percentage of the PACE cost to the PACE Fee (Per PACE) amount that is billed for each PACE issued to a student.
 - If the school's PACE cost is \$2.48 and 150% is entered in this field and the PACE Fee (Per PACE) is set at 0.00, the PACE will be billed at \$2.48 x 150% = \$2.48 x 1.5 = \$3.72.
 - If the PACE Fee (Per PACE) is set at \$3.00 and the Plus Percentage of PACE Cost is set at 50%, for a PACE that costs the school \$2.48, the program will bill \$3.00 + (\$2.48 x 50%) = \$3.00 + \$1.24 = \$4.24
 - NOTE: If you want to bill using the PACE fee (Per PACE) field, the amount on the Plus Percentage of PACE Cost line must be set at 0%.

Contact (School contact information)

- Fax
- Mailing Address (where the school receives mail)
- Mailing Address 2
- Mailing City
- Mailing Country
- Mailing ZIP/Postal Code
- Mailing State/Province
- Phone
- Physical Address
- Physical Address 2
- Physical City
- Physical Country
- Physical ZIP/Postal Code
- Physical State/Province

Schools in California, Indiana, or other areas awarding high school credit other than 1 credit for a full-year course, please pay special attention to "High School Subjects" on page 27.



Inventory

- Allow Online Ordering Determines whether the system will automatically order PACEs
- Order PACEs Ahead Indicates the number of PACEs per subject to order ahead for each student when Allow Online Ordering is checked
- Use Free Floating Mode Determines how ordered and inventory PACEs are handled. In Free Floating Mode, the program uses smart logic to determine when to order PACEs but does not assign them to a specific student. PACEs added to inventory manually will be assigned by the program to a student as the need for the PACE arises.

When Free Floating Mode is off, all PACEs ordered are allocated to the student that caused the item to be ordered. PACEs added to inventory manually must be assigned to a student or they will remain in inventory unused and the program will continue to order new PACEs as if those particular PACEs do not exist.

School

- Administrator Name
- Logo

Click in the area below Administrator Name, then rightclick to access the image options menu. Your logo will display in the upper left next to the school name and on any printable report.

Academic Year

The Academic Year section contains academic records for all years included in the program. Open **Setup** and click **Academic Year**.

To create and configure an academic year, click **New**. Type a Name (e.g., 2016-2017), enter the Begin Date and End Date values, and click **Save**.

The program will scale your school logo to the correct size. However, to maintain the correct proportions, it is recommended that your school logo have the same horizontal and vertical measurements (a square).



	-			1 and				User: ad
etup	🛃 Save 🕂 New	v 💥 Delete 🕜 S	et as Current	2				Help
School Configuration	Name		Begin Date		End Date		Current Year	About
Academic Year	2014-2015		8/18/2014		5/15/2015			User Guide
Roles and Permissions	2013-2014		8/19/2013		5/17/2014			
Rooms	2012-2013		8/20/2012		5/18/2013			
Staff and Users	2011-2012		8/22/2011		6/1/2012			_
Subject Types	2010-2011		8/23/2010		5/20/2011			
								-
Subjects	Details							
Grade Conversions								
Grade Conversions		-						
Courses of Study	Period Type	-	Name Quart					
	Period Type	 Trimester Star 	Name Quart		ate 10/18/2014			
Courses of Study	Period Type	-			ate 10/18/2014		> Update	
Courses of Study Grade Types Standardized Testing		 Trimester Star 		2014 💟 End D	ate 10/18/2014		> Update	
Courses of Study Grade Types Standardized Testing Desirable Traits	Period Type School Days	 Trimester Star Semester 	t Date 8/18/	2014 💽 End D				2
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types		 Trimester Star Semester August 	t Date 8/18/2	2014 C End D	2014	October > 201-	4 >	
Courses of Study Grade Types Standardized Testing Desirable Traits		 Trimester Star Semester August <u>S M T W</u> 	<pre>t Date 8/18/2 < 2014 T F S</pre>	2014 End D	2014 F S	October > 201- S M T W T F	4 >	
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types		Trimester Star Semester	< 2014 T F S 31 1 2	2014 End D September <u>S M T W T</u> 1 2 3 •	2014 FS	October > 201- S M T W T F 1 2 3	4 > <u>5</u> 4	
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types		Trimester Star Semester Star S M T W 27 28 29 3 4 5 10 11 12	<pre>< 2014 T F S 31 1 2 7 8 9 14 15 16</pre>	2014 September September 5 M T W T 1 2 3 4 7 8 9 10 1 14 15 16 17 11	2014 F S 5 6 12 13 19 20	October > 201- S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17	4 > S 4 11 18	
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types		Trimester Star Semester Star Semester <td><pre>< 2014 T F S 31 1 2 7 8 9 14 15 16 21 22 23</pre></td> <td>2014 End D September 5 M T W T 1 2 3 4 7 8 9 10 11 14 15 16 17 11 21 22 23 24 25</td> <td>2014 F S F 6 12 13 19 20 26 27</td> <td>October > 201 S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17 19 20 21 22 23 24 3</td> <td>4 > S 4 11 18</td> <td></td>	<pre>< 2014 T F S 31 1 2 7 8 9 14 15 16 21 22 23</pre>	2014 End D September 5 M T W T 1 2 3 4 7 8 9 10 11 14 15 16 17 11 21 22 23 24 25	2014 F S F 6 12 13 19 20 26 27	October > 201 S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17 19 20 21 22 23 24 3	4 > S 4 11 18	
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types Note Types		Trimester Star Semester Star S M T W 27 28 29 3 4 5 10 11 12	<pre>< 2014 T F S 31 1 2 7 8 9 14 15 16 21 22 23</pre>	2014 September September 5 M T W T 1 2 3 4 7 8 9 10 1 14 15 16 17 11	2014 F S F 6 12 13 19 20 26 27	October > 201- S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17	4 > S 4 11 18	
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types Note Types		Trimester Star Semester Semester August <u>S</u> M 7 28 29 30 3 4 10 11 12 13 17 18 19 24 25 26	<pre>< 2014 T F S 31 1 2 7 8 9 14 15 16 21 22 23</pre>	2014 End D September 5 M T W T 1 2 3 4 7 8 9 10 11 14 15 16 17 11 21 22 23 24 25	2014 F S 5 6 12 13 19 20 5 26 27	October > 201 S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17 19 20 21 22 23 24 3	4 > 5 4 11 18 25	
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types Note Types ome amlies		Trimester Star Semester Semester August M Z7 22 0 14 27 22 28 29 11 12 17 18 24 25 25 26 31	 Control (10) Contr	2014 September September 5 M T W T 1 2 3 4 7 8 9 10 7 14 15 16 17 11 21 22 23 24 22 28 29 30	2014 F S 5 6 12 13 19 20 2014	October > 201: S M T W T F 1 2 3 5 6 7 8 9 10 13 14 15 16 17 19 20 21 22 23 24 26 27 28 29 30 31	4 > <u>S</u> 4 111 18 25	
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types Note Types ome amlies		Trimester Star Semester Star S M T V 27 28 29 30 3 4 5 6 10 11 12 13 17 18 19 20 24 25 26 27 31 November S M T W 27 31 31	 Z014 T F S 31 1 2 7 8 9 14 15 16 21 22 23 28 29 30 2014 T F S 1 	September End C September 5 1 2 3 7 8 9 10 14 15 16 17 12 2 2 2 28 29 30 December S M T W 1 2 3 4 1 2 3	2014 F S 5 6 12 13 19 20 2014 F S 5 6	October > 201 S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17 19 20 21 22 3 24 26 27 28 29 30 31 January 2011 S M T W T F 	$4 \rightarrow \frac{5}{4}$ $\frac{5}{4}$ 11 18 25 5 $\frac{5}{3}$	
Courses of Study Grade Types Standardzed Testing Desrable Traits Relationship Types Note Types ome amilies tudents		August Star Semester S Y August S M Y Z7 Z8 29 J 4 S M Y 18 20 24 25 26 31 S November S S M 2 3 4 5	<pre>c 2014 T F S Si1 1 2 7 8 9 14 15 16 21 22 23 22014 T F S 2014 T F S 6 7 8 </pre>	September End C 1 2 3 - 7 8 9 10 - 14 15 16 17 1 - - 28 29 30 -	2014 F S 5 6 12 13 19 20 2014 F S 2014 F S 2014 19 20 19 20 10 20	October > 201 S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17 19 20 21 22 23 24 26 27 28 29 30 31 January 201 S M T W T F 1 2 4 5 6 7 8 8	$4 > \frac{5}{4}$ $\frac{5}{4}$ $\frac{111}{125}$ $\frac{5}{3}$ $\frac{5}{3}$ $\frac{10}{10}$	
Courses of Study Grade Types Standardized Testing Desirable Traits Relationship Types		Trimester Star Semester Star S M T V 27 28 29 30 3 4 5 6 10 11 12 13 17 18 19 20 24 25 26 27 31 November S M T W 27 31 31	 < 2014 < 8/18/ < 2014 < 7 8 9 < 14 15 16 < 12 22 23 < 22 29 30 < 2014 < 7 F S < 1 1 < 1 1	September End C September 5 1 2 3 7 8 9 10 14 15 16 17 12 2 2 2 28 29 30 December S M T W 1 2 3 4 1 2 3	2014 F S 5 6 12 13 19 20 2014 F S 2014 F S 4 5 6 12 13 19 20	October > 201 S M T W T F 1 2 3 5 6 7 8 9 10 12 13 14 15 16 17 19 20 21 22 3 24 26 27 28 29 30 31 January 2011 S M T W T F 	$4 \rightarrow \frac{5}{5}$ $5 - \frac{5}{3}$ 10 17	

After saving, configure the following details for the Academic Year.

- Period Type The type of period desired. Options are Quarter, Trimester, and Semester. After choosing the Period Type, configure each period with Name, Start Date, and End Date. Click Update. Use the slider to advance to the next period. Continue this process until all periods are configured.
- School Days Valid school days are highlighted on the School Days calendar. Click any day in the calendar to toggle the school day on or off.

NOTE: The School Days Calendar provides the record for the number of school days in session that appears on the Permanent Record. It is important that any days school is not in session be toggled off and all days in session be toggled on for accurate reporting.

	Augu	ust		<	20	14		Sep	teml	ber			20	14		Oc	tobe	er	>		20	14 >
5	S M	1 Т	w	т	F	s		s	м	т	w	т	F	s		s	м	т	w	т	F	S
2	7 28	8 29	30	31	1	2	-		1	2	3	4	5	6	-				1	2	3	4
	3 4	4 5	6	7	8	9		7	8	9	10	11	12	13		5	6	7	8	9	10	11
1	0 1	1 12	13	14	15	16		14	15	16	17	18	19	20		12	13	14	15	16	17	18
1	7 1	8 19	20	21	22	23		21	22	23	24	25	26	27		19	20	21	22	23	24	25
2	4 2	5 26	27	28	29	30		28	29	30						26	27	28	29	30	31	
3	1																					
N	oven	nber			20	14		Dec	emb	er			20	14		Jar	nuar	y			20	15
5	s M	1 Т	W	т	F	s		s	м	т	W	т	F	s		s	М	т	W	т	F	S
						1			1	2	3	4	5	6						1	2	3
				-		8		7	8	9	10	11	12	13		4	5	6	7	8	9	10
	2 3	34	- 5	6		ō																
	23 910			-				14	-		17	18	19	20		11	12	13	14	15	16	17
	9 1(12	13	14	15			-	16	17 24					11 18	12 19	13 20	14 21	15 22		
	9 10 6 17	0 11	12 19	13 20	14 21	15 22		21	15	16 23	24					18	19	20		22		24

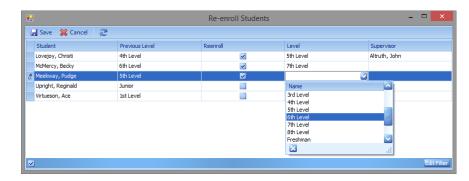


• Click **Set as Current** on the top menu. A green check mark will appear on the row for that academic year.

Additional actions include:

- Save Save the academic year that is currently being edited.
- New Add a new academic year.
- Delete Click the year you wish to delete and click Delete.
- Set as Current Click the year you wish to set as the current academic year, and click **Set as Current**.

If this is a newly created year with no information added yet, a prompt will allow you to choose which students to reenroll. Confirm the levels and supervisors for each reenrolled student, then click **Save**. You can still enroll individual students later.



All prescribed PACEs/Units without scores on the Student Progress Control for the current year will be moved to the new Progress Control to be completed in the new year.

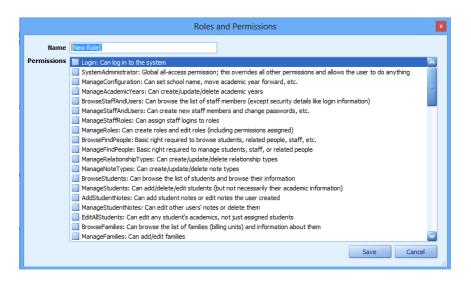
Roles and Permissions

School Management includes the following default roles.

- Administrators
- Supervisors
- Monitors
- Secretary

To add a new role, click **New**. The Roles and Permissions dialog box will appear.





Enter a name for the new role and select the desired permissions. Click **Save**.

To modify the permissions for any role, select the role and click **Edit**.

Rooms

To add a new room, click **New**, enter the Name. To allow PACEs, resource books, etc. to be assigned to that room, set the values for Can Have Inventory? Set the values for Is Learning Center? Navigating to another row automatically saves the new room.



To edit a room, select it and modify the desired values.

To delete a room, select it and click **Delete**.

Staff and Users

The program installs with one staff account named admin. If only one person will be using the program, one account is sufficient. If there will be additional users, set them up now. Add staff by opening the **Setup** menu and clicking **Staff and Users**.



School Management						L	- O X	
Western 1.05120 Loogut User: admin User: admin								
Setup	4	New 🥖 Edit 💢 Delete	2			Help	2	
School Configuration		Name	Room	Locked Out	Last Login Time		About	
Academic Year	•	admin			1/21/2014	L L	User Guide	
Roles and Permissions		Alltruth, Rev. John			1/8/2014			
Rooms		Friendson, Mr. Paul B.	Main Learning Center		1/8/2014			
Staff and Users		Content, Miss Ann J.	ABC Learning Center		1/8/2014			

NOTE: Rooms must be added before adding Staff and Users. Staff cannot be assigned to a Learning Center until it is added in the Rooms section.

To set up a new staff person or user, click **New**. The Select Person dialog box will display. You may search for an existing entry or click **Add New Person** at the bottom.

	ect Person earch For:		-		× Search
	First Name	Middle Name	Last Name	Name Suffix	Cell Phone
×	admin				
	John		Alltruth		777-123-4567
	Paul	в.	Friendson		777-456-7894
	Ann	J.	Content		777-456-6321
	Rachel	Ε.	Lovejoy		777-566-7895
	Rebecca		Lovely		666-666-6666
	John	Ρ.	McMercy		615-566-5555
	Sarah		McMercy		
	Sandy		McMercy		
	Becky		McMercy		
	Bill		McMercy		
	David	в.	Virtueson		615-596-5555
	Faith		Virtueson		
	Ace		Virtueson		
	Hudson		Willing		
A	dd New Person		with		OK Cancel

A dialog box will appear. Enter data in each of the fields and click **Save**. **NOTE:** Only the bold fields are required.



			ŀ	Add Person			x
		Prefix					
		First Name			Gender		
[None]		Middle Name			Birthday		
		Last Name			Citizenship		
		Suffix					
Contact Info	Address	es					
Cell Phone				Email Address			Send
Home Phone				Twitter			Go
Work Phone				Facebook			Go
Other Phone				Website			Go
					[Save	Cancel

To edit an existing user, select the person and click **Edit**. The Edit Staff dialog box will appear.

	Edit	Staff	×
Person	2 ···	Last Login	
User Name		Last Password Change	
Password		Invalid Login Count	
Verify			User Is Locked Out 📃
Staff Roles	Administrators Supervisors Monitors Secretary	User M	ust Change Password 📃
Room	[N/A]	5	Gave Cancel

In the Edit Staff dialog box, enter the following and click Save:

- User Name Enter a user name for logging in.
- Password Enter the desired password in both the Password and Verify fields.
 - Passwords are case sensitive.
 - Be sure to reset the admin password if that hasn't been done. <u>See page 13</u>.



- Staff Roles Select the desired role(s) for the user.
- Room Select the room to which the staff person is assigned (optional).
- User Is Locked Out If this box is checked, the user will not be allowed to access School Management.
 NOTE: If the admin account experiences password lock-out due to too many log-in attempts, contact Technical Support at 615-612-5288 for assistance.
- User Must Change Password Select this box to force the user to enter a new password the first time he logs in.

To edit a staff person or user, select the name and click Edit.

Werdow: 1.0.5120 Logout Werdow: 1.0.5120 Logout User: admin User: admin								
etup	4	New 🥖 Edit 💢 Delete	2				Help	
School Configuration		Name	Room	Locked Out	Last Login Time		About	
Academic Year	•	admin			1/20/2014		User Guide	
Roles and Permissions		Alltruth, Rev. John			1/8/2014			
Rooms		Friendson, Mr. Paul B.	Main Learning Center		1/8/2014			
Staff and Users		Content, Miss Ann J.	ABC Learning Center		1/8/2014			

Subject Types

To add a new subject type, click **New**. Enter the desired name and a color (optional).

🏁 Highland	S	chool			User: adr
tup	L	Save 🕂 New 💢 Delete 🛛 🥭			Help
School Configuration		Name	Color	Display Order	About
Academic Year		Reading Development		1.00	User Guide
Roles and Permissions		Math	255, 255, 0	2.00	
Rooms		English	255, 0, 0	3.00	
Staff and Users		Word Building	128, 0, 128	4.00	
		Literature and Creative Writing	128, 0, 0	5.00	
Subject Types		Science	0, 0, 255	6.00	
Subjects		Social Studies	0, 255, 0	7.00	
Grade Conversions		Bible	240, 230, 140	8.00	
Courses of Study		Electives	255, 192, 255	9.00	
Grade Types		College Curriculum		10.00	
		Spanish		11.00	
Standardized Testing		Testing Materials		12.00	
Desirable Traits		Training Materials		13.00	
Relationship Types	I				

To edit a subject type, click on the desired row and modify the value you wish to change.

To delete a subject type, click on the desired row and click **Delete**.

NOTE: Default subject types cannot be edited or deleted.



Subjects

If your school has custom subjects that are not part of the A.C.E. curriculum catalog, add them to School Management.

To add a new subject, click **New**. The Subject dialog box will appear.

	Su	bject	x
Name Subject Type			
		/Units per 1 😜 c	
GPA Weight		Starting PACE/Unit Ending PACE/Unit	1001 😜
Is PACE Is Assignable	_	Min. Passing Score	80 😜
		Save	Cancel

Enter the following and click Save:

- Name Enter the name of the subject.
- Subject Type Select the desired Subject Type from the dropdown list.
- PACEs/Units per credit Select the number of PACEs/Units per credit.
- GPA Weight Select the weight (percentage) to be used for the subject when calculating the GPA. Depending on the High School Avg Use GPA Weight option in Setup > School Configuration (see page 17), these GPA Weights may also be used to calculate the Overall High School Average.
- Is PACE Select the check box if the subject is a PACE subject.
- Starting PACE/Unit Select the starting number.
- Ending PACE/Unit Select the ending number.
- Min. Passing Score Select the minimum passing score for this subject. This will override the minimum score entered in the Academic section of School Configuration.

To edit a subject, click on the subject row and click Edit.

To delete a subject, click on the subject row and click **Delete**.

NOTE: Default subjects cannot be edited or deleted.



High School Subjects

When adding a subject that can result in high school credits for multiple years, set it up with a unique name each year (e.g., Physical Education I, Physical Education II, etc.).

Some areas, such as California and Indiana, use a different value system for high school credits other than one credit for a full-year course. These schools must edit **all Subjects** so the values indicate the correct number of credits before adding or importing any student records.

Example--California 10 credits per year:

Subject		8
Name	English I	1
Subject Type	English	
	12 😔 PACEs/Units per 10.0 😔 credit(s)	
GPA Weight	100 😜 % Starting PACE/Unit 1097	
Is PACE	Ending PACE/Unit 1108	
Is Assignable	Min. Passing Score 80	
*A.C.E. Item	* Save Cancel	

Grade Conversions

The Grade Conversions menu item shows the grading scale used by School Management. The program defaults to a 4-point grading scale. If your school uses a different scale, set it here.

Grade conversions determine the corresponding letter grade based upon numeric scores. They are linked to the current academic year, and default conversions are added any time a new academic year is added.

🏁 Highland	School				Version: 1.0.5120
-					User: ad
tup	🚽 🚽 Save 🖓 New 💥 De	lete 🦻			Help
School Configuration	Letter Grade	Min Score	Max Score 👻	Grade Points	About
Academic Year	▶ A+	98.00			User Guide
Roles and Permissions	A	96.00	97.00	4	
Rooms	A-	94.00	95.00	4	
Staff and Users	B+	92.00	93.00	3	
	В	90.00	91.00	3	
Subject Types	B-	88.00	89.00	3	
Subjects	C+	86.00	87.00	2	
Grade Conversions	с	83.00	85.00	2	
Courses of Study	C-	80.00	82.00	2	
Grade Types	D+	76.00	79.00	1	
	D	74.00	75.00	1	
Standardized Testing	F	0.00	73.00	0	

NOTE: You must set up the Academic Year prior to modifying Grade Conversions.



To edit an existing grade conversion, click on the item and modify the desired values.

- Letter Grade
- Min Score the minimum score for the letter grade
- Max Score the maximum score for the letter grade
- Grade Points the grade points for the letter grade (used when calculating student GPAs)

Courses of Study/Graduation Requirements

School Management is preconfigured with four Courses of Study.

- Honors
- College Preparatory
- General
- Vocational

School Management						ersion: 1.0.5120 Logo
🦇 Highland	School					User: admi
Setup	🚽 Save 🔶 Nev	v 💢 Delete 🛛 🌊				Help
School Configuration		About				
Academic Year		Name	Total Required Credits	Base Credits		User Guide
Roles and Permissions		Honors	27.00	22.00		
Rooms		College Preparatory	25.00	17.00		
Staff and Users		General	23.00	15.50		
Subject Types		Vocational	22.00	5.00		
Subjects						
Grade Conversions						
Courses of Study		9	Subjects for Honors			
Grade Types	🛃 Save 🕂 New	💢 Delete 🛛 🤁				

It is recommended that you make adjustments to the default Courses of Study to reflect your school's requirements.

To add a custom Course of Study, click **New**. Enter text for Name and Total Required Credits. The Base Credits will be automatically calculated as subject requirements are entered.

To delete a Course of Study, select the item and click **Delete**.

To add subjects for a Course of Study, click **New** in the Subjects grid. Enter the number of credits, select the Subject Type, and select the Subject. Any subject your school requires for **all students** in a particular Course of Study should be added to that Course of Study. For example, if your school requires Old Testament Survey for all students on the College Preparatory Course of Study, add that course to the College Preparatory Course of Study.



To delete a subject from a Course of Study, select the item and click **Delete**.

Grade Types

Grade Types are used to define student levels in School Management.

To add a new Grade Type, click **New** and enter the following information:

- Name the name of the grade level
- Short Name the number of the grade level
- Order the sequential order of the grade type
- Allow Kindergarten Checking this box makes kindergarten items available for this grade type.
- Allow ABCs Checking this box makes ABCs items available for this grade type.

To delete a grade type, select the item and click **Delete**.

NOTE: Grade Types cannot be deleted once students have been assigned to them.

Standardized Testing

The Standardized Testing setup allows you to enter any number of standardized tests and score areas for tracking.

To add a standardized test, click **New**. The Add New Standardized Test dialog box will appear. Enter text for the Name and Provider. Click **New** to add Score Areas and minimum and maximum scores for each section being added. Once all desired Score Areas have been added, click **Save**.

To edit a standardized test, select the item and click Edit.

To delete a standardized test, select the item and click **Delete**.



Desirable Traits

NOTE: Desirable Traits are preconfigured in School Management. It is recommended that you do not modify or delete them. Desirable Traits are grouped by category. To collapse a category, click the "-" symbol. To expand a category, click the "+" symbol. You can also collapse or expand all categories using the appropriate buttons on the toolbar.

School Management				
🦇 Highland	School		Ve	rsion: 1.0.5120 <u>Loqout</u> User: admin
Setup	🛃 Save 👍 New 💢 Delete 🛛 ỡ Expand All	Collapse All		Help 🔝
School Configuration	Name	Category	Sequence	About
Academic Year	Category: Work Habits			User Guide
Roles and Permissions	Follows Directions	Work Habits	10	
Rooms	Works Well Independently	Work Habits	20	
Staff and Users	Does Not Disturb Others	Work Habits	30	
	Takes Care of Materials	Work Habits	40	
Subject Types	Completes Work Required	Work Habits	50	
Subjects	Achieves Computer Assignments	Work Habits	60	
Grade Conversions	Category: Social Traits			
Courses of Study	Is Courteous	Social Traits	70	
Grade Types	Gets Along Well with Others	Social Traits	80	
	Exhibits Self-Control	Social Traits	90	
Standardized Testing	Shows Respect for Authority	Social Traits	100	
Desirable Traits	Responds Well to Correction	Social Traits	110	
Relationship Types	Promotes School Spirit	Social Traits	120	
Note Types	Category: Personal Traits			
	Ability to Establish Own Goals	Personal Traits	130	
Home	Successfully Reaches Goals	Personal Traits	140	
Families	Displays Flexibility	Personal Traits	150	
	Shows Creativity	Personal Traits	160	
Students	General Overall Progress	Personal Traits	170	
Billing	Attitude Toward Computer Learning	Personal Traits	180	
Inventory				
Reports				
Reports				
Setup				

To add a new desirable trait, click **New** and enter the Name, Category, and Sequence. Navigating to another row automatically saves the new desirable trait.

To edit a desirable trait, select the item and modify the desired values.

To delete a desirable trait, select the item and click **Delete**.

Relationship Types

To add a new relationship type, click **New** and enter the name. Navigating to another row automatically saves the new relationship type.



🏁 Highland	School	Version: 1.0.5120
	-	User: adm
etup	🛃 Save 🕂 New 💢 Delete 🥭	Help
School Configuration	Name	About
Academic Year	Aunt	User Guide
Roles and Permissions	Caseworker	
Rooms	Counselor	
Staff and Users	Cousin	
Subject Types	Doctor	
	Father	
Subjects	Grandfather	
Grade Conversions	Grandmother	
Courses of Study	Mother	
Grade Types	Pastor	
	Sibling	
Standardized Testing	Therapist	

To edit a relationship type, select the item and modify the name.

To delete a relationship type, select the item and click **Delete**.

Note Types

School Management allows you to add notes to certain areas of the program. The type of note determines its behavior in the area in which it is used.

School Management				_
🦇 Highland	School		v	ersion: 1.0.5120 <u>Loqout</u> User: admin
Setup	🕂 New 🧷 Edit 💢 Delete 🤕			Help 🔝
School Configuration	Name	Can Grant Merits	Can Grant Demerits	About
Academic Year	General			User Guide
Roles and Permissions	Academics			
Rooms	Disciplinary		×	
Staff and Users	Medical			
Subject Types	Biling			
Subjects	Merits Goals	 ✓ 	~	
Grade Conversions	Privilege			
	- Things			
Courses of Study				
Grade Types				
Standardized Testing				
Desirable Traits				
Relationship Types				
Note Types				

To add a new note type, click **New**. The Note Type dialog box will appear.



Note Type	e	×
Name Allow Merits 🗹		
Note Subtypes:		
Name	Default Demerits	Default Merits
	Save	Cancel

Enter the desired name and whether or not the note type allows merits and demerits (both of which are optional). Next, add Note Subtypes as desired by clicking **New**. Enter the name and the merits or demerits as required. Click **Save** when all items have been entered.

To edit a note type, select the item and click Edit.

To delete a note type, select the item and click **Delete**.

Billing Plan

Before adding families to School Management or importing families from School of Tomorrow Management System, you must first set up at least one billing plan. Open the **Billing** menu and click **Billing Plans**. For additional information, <u>see page 76</u>.

Note: You may need to restart the program when completing setup in order for the billing plans to display.



CHAPTER 5

STMS Data Import Section

STMS Data Import will import your existing records from the School of Tomorrow Management System into aceconnect School Management. The import will copy existing records for any families you select, all the students in that family, and all the students' subjects and grades. The import will not include attendance records, discipline records, Scripture memory, Readmaster Plus® records, standardized tests, photographs, financial records, or inventory.

Preparation

Before importing records from the School of Tomorrow Management System, you must first complete the steps listed in the Setup Section beginning on <u>page 17</u>. The STMS Data Import cannot be run until you first set up your current school year, at least one billing plan, and at least one staff member in School Management. In case you miss any of these preparatory steps, the STMS Data Import will alert you before allowing any records to be imported.

Since STMS only displays a completion date for completed subjects, School Management imports PACEs based on the beginning and ending dates (month and day) the user inputs when the initial school year is set up. These beginning and ending dates (month and day) become the default beginning and ending dates for all prior years subjects imported into School Management.

It is possible that credits for some subjects (those completed outside the range of dates entered above) may be assigned to an incorrect school year. To minimize the number of times this happens the user has two options.

 (Recommended) Set up the initial school year with a beginning date of August 1 and your school's actual ending date.





Once the import process is complete, go back into the Setup menu and change Begin Date to your school's actual beginning date.



 In the Setup menu in School Management, set up previous school years with the actual beginning and ending dates of each school year prior to the current one (as far back as you want to be certain all credits import in the correct school year).

Selecting a Backup from School of Tomorrow Management System

The STMS Data Import requires a backup of your current School of Tomorrow Management System records. If you don't already have a current backup, you must make one.

- 1. Open School of Tomorrow Management System.
- 2. Click File > Utilities > Backup Data.
- 3. Select a location to place your backup.
 - a. If the aceconnect School Management server is running on the same computer as your School of Tomorrow Management System, you can save the backup in the C:\STMS\ Folder.
 - b. If the aceconnect School Management server is running on a separate computer, save the backup to a portable external hard drive or flash drive so you can transport the backup file to the computer with the School Management server.

Running the Data Import

The steps to open and run the STMS Data Import are as follows and must be completed on the aceconnect School Management server computer. The STMS Data Import cannot be run from a client computer.

Start the Import

On the Windows Start Menu, select **All Programs**, then select **School Management System**. Select **STMS Data Import**.



NOTE: Only records from School of Tomorrow Management System version 3.1.1 can be imported into aceconnect School Management. If your version is older than 3.1.1, the import utility will not allow the import. Upgrade School of Tomorrow Management System to 3.1.1 and then run the import. For Windows 8, select Start, then open STMS Data Import.

Step 1 – Select Data

- 1. Click **Select** and find your backup file from School of Tomorrow Management System.
- 2. Select the server for School Management. The server should be located automatically; however, you can type in the location.

Step 2 – Select Families and Students to Import

- All family accounts included in your backup from School of Tomorrow Management System will display in a list. Select the families you wish to import into School Management. It is recommended that you import all families. However, you can import a single family to see how the process works and run STMS Data Import again to import the remaining families.
- The students in the currently selected family will display on the right. Although only students for one family will display, all students for each family you select will be imported.
- The option to Import PACEs as Billed displays on the bottom right. Choose Yes or No. Or click What's this? for more information.

] Chec	k All	Family	Accounts		School Mar	amilies on the left to im agement. When you s udents from that family	elect a
Import	Num	First Name	Last Name	×	imported.		
	106	Mr.& Mrs. D.	Virtueson	-	Students		
	108	Mr.& Mrs. C.	Upright	=	First	Last	Grade
	109	Mr.& Mrs. J.	McMercy		Becky	McMercy	2
100	110	Mr.& Mrs. R.	Lovejoy				
	111	Mr.& Mrs. H.	Humblen				
	115	Mrs. B.	Meekway				
1	116	Mr.& Mrs. I.	Loyalton				
100	117	Mr.& Mrs. J.	Observant				
	119	Mr.& Mrs. K.	Seemore				
	120	Mr.& Mrs. E.	Wentforth	*			
is impo	rt will not		in your new School Mana; student's data. This impor student.			o rt PACEs as Suggested) 🔘 No	Billed What's this?

Step 3 – Import

During this process the families and students you selected will be imported and the progress will display. Dialog boxes may ask for input throughout the process.



 Link or Add a Subject – This message will appear if a subject from your School of Tomorrow Management System records is not found in School Management.

School Management - ART Not Found	
You are attempting to import ART from your old records. could not be found. Choose an option below.	. This subject
♥ Link ART Accessories and Supplies - Accessories and Supplies Electives - Choose Art Electives - Health Electives - Miracles of Jesus Electives - Miracles of Jesus Electives - New Testament Survey Electives - New Testament Survey Electives - PE 10 Electives - PE 10 Electives - PE 10 Electives - PE 11 Electives - PE 12 Electives - PE 9 Electives - PE 10 Electives - PE 9 Electives - PE 9 Electives - PE 9 Electives - PE 9 Electives - PE 10 Electives - PE 9 Electives - PE 9 Electives - PE 10 Electives - PE 10 Elective	E
Remember this link for other students with ART	
Add ART as a New Subject.	
L	Continue

• Enter a Subject Grade – This message will appear if a student's subject does not have a valid grade to import into School Management. Review the student's past records to determine what grade to input.

Bible Reading for Becky McMercy does grade must be entered for this subject b imported. Choose an option below.	
🛇 Use a Letter Grade	v
• Use a Percentage Grade	

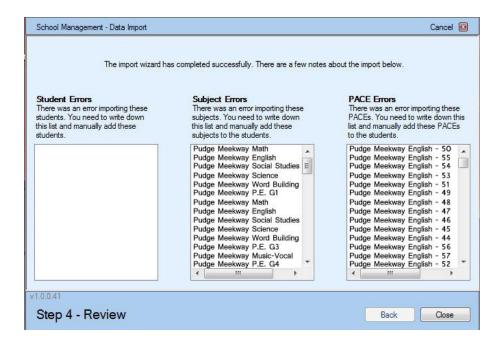
• Enter a Valid Date – This will appear if an invalid date is encountered during the import. You will need to enter a correct date.



School Management - Enter a Valid Date					
The date of 1/1/1800 is not a Virtueson. Please enter a ne					
Enter a valid date:					
	Continue				

Step 4 – Review

A final report displays three lists to indicate any errors within the import. You will need to manually add those items to School Management. It is very important that you write down any errors before closing the STMS Data Import.



Follow-Up

After running the STMS Data Import, you are now ready to finish setting up School Management.

• Assign a staff member and a Learning Center for each student. This must be done since STMS Data Import assigns all students to the School Management default staff member. If you have multiple supervisors, assign



each student to the proper supervisor. This can be done on the student's enrollment screen for the current year. Previous years are assigned to the default supervisor. For more information, <u>see page 23</u>.

- The School of Tomorrow Management System program defaulted to a 3.0 GPA and used a grading scale that did not allow pluses and minuses (A-, B+, B-, C+, C-) for PACE scores. The School Management program defaults to a 4.0 GPA and does allow pluses and minuses for PACE scores. Because of this upgrade, the GPA for a particular student in a particular year in School of Tomorrow Management System may be slightly different than the GPA for the same student in the same year in School Management. This is not an error; it is the result of an upgraded method of calculation.
- Carefully check each high school student's Academic Projection.
 - Any incorrect subjects can be deleted or edited in the Graduation Requirements section of the Academic Projection.
 - Since non-PACE subjects entered in School of Tomorrow Management System do not have a completion date, any non-PACE subjects listed as Current on the Academic Projection in School of Tomorrow Management System are imported into the academic year you set as the current year when you set up School Management.

For example, if you select the 2014-2015 school year as your current year in Setup of School Management, non-PACE subjects listed as Current on the Academic Projection in School of Tomorrow Management System will be imported into that year, regardless of the actual school year in which they were completed.

Wension: 1.0.5265 Looput User: admin							
Setup	🖌 🚽 Save 🐥 New 🙀 Delete 🕜 Set as Current 🛛 🦉						Help 🚨
School Configuration		Name	Begin Date	End Date	Current Year		About
Academic Year		2014-2015	8/18/2014	5/15/2015	0		User Guide
Roles and Permissions		2013-2014	8/19/2013	5/17/2014			

 Following the completion of the import process, a Supervisor's Progress Report and a Permanent Record will be available for all previous years a student was enrolled in your school. Transcripts will be available for



all current high school students. Kindergarten Progress Reports and ABCs Progress Reports will not display completed PACEs. The Student Progress Report will only display completed PACEs for the current academic year.

- Set each family's Billing Plan. The STMS Data Import assigns each family to your first Billing Plan. If you have multiple Billing Plans, review each family in the Browse Families menu item to verify that they are properly assigned.
- Inventory is not imported through STMS Data Import. Any PACE prescribed to a student in School Management that is not complete must be manually added into inventory before placing orders. <u>See page 85</u> for the steps to add PACEs to inventory.
- Before importing any records, the STMS Data Import first makes a backup of your School Management records. This can be very helpful if you make a mistake during the import and need to undo the changes and run the import again. You can restore the backup in School Management by opening the Home menu and clicking Backup/Restore. With this in mind, you can import your School of Tomorrow Management System records, use the program for a while to become comfortable with it, and then restore the backup to start over.
- If your current backup from School of Tomorrow Management System only contains current students, you can run the STMS Data Import multiple times with older backups to import other students. Keep in mind that if you import a family multiple times, duplicate families will display in School Management. You will need to delete the duplicate.



CHAPTER 6

Home Section

The **Home** screen is displayed each time you start the aceconnect School Management client.

	nd School			Version: 1.0.5120
-				User: admi
Home	Scripture Due			Run Report
Dashboard	Assigned By	Passage	Start Date	Help
Resources	et admin	2 Timothy 2:1-4	11/1/2013	About
Find People	admin	2 Timothy 2:1-13	11/1/2013	User Guide
	admin	2 Timothy 2:22-26	12/1/2013	User Guide
Backup/Restore	(+) admin	2 Timothy 2:14-26	12/1/2013	
Shutdown	(+) admin	2 Timothy 3:1-5	1/5/2014	
License	(+) admin	2 Timothy 3:1-9	1/5/2014	
Portal Settings	admin	2 Timothy 3:14-17	2/1/2014	
Portal Settings	+ admin	2 Timothy 3:10-17	2/1/2014	
Home		2 Timethy dr1 d	2/1/2014	
nome	Homework Due			
Famílies	Student	Goal Subject	Goal Task	
Students	 Virtueson, Ace 	Etymology	Finish Goal Pages	
Billing	Virtueson, Ace	Algebra I	Finish Goal Pages	=
biiriy	McMercy, Sandy	Word Building	Finish Goal Pages	
Inventory	McMercy, Sandy	English	Finish Goal Pages	
Reports	McMercy, Bill	Biology	Finish Goal Pages	
	McMercy, Bill	Etymology	Finish Goal Pages	

Help Panel

The Help Panel on the right displays links to the About dialog box and the *User Guide*.

Dashboard

The Home section displays the Dashboard, providing a quick view of Scripture Due and Homework Due.

Resources

Manage books and DVDs with this option.

To add a new resource item, click **New** and enter the appropriate information. If desired, include the Location, the student to whom the item is Checked Out, and the CO Date (Checked Out Date). Be sure to save the data.



🗯 Highlan	d So	chool						User: adr
ome		🚽 Save 🝦 New 💥 Delete	200	heck In				Help
Dashboard		Name 🔺	Book No.	Level 🔺	Location	Checked Out	CO Date	About
Resources		😑 Level: 3						User Guide
Find People		Summer Fun with Ace and C	30a	3	Main Learni	[Not checked o		
Backup/Restore		Summer Fun with Ace and C	30b	3	Main Learni	[Not checked o		
Shutdown		🔁 Level: 4						
		Charlotte's Web	44a	4		[Not checked o		
License		Choice Stories for Christians	48a	4		[Not checked o		
Portal Settings		The Little Green Frog	40a	4	Main Learni	[Not checked o		
		a Level: 5						
ome		Heidi	54a	5	Main Learni	[Not checked o		
amilies								
tudents								
illing								
illing								
iventory								
eports								

To check in a resource, select the item and click **Check In**. The status will be reset to Not Checked Out.

To edit a resource, click on the item and modify the desired information.

To delete a resource, select the item and click **Delete**.

Find People

To access information for a particular person, click **Find People**. Searching can be done by name or phone number. Type the beginning of the name or phone number as appropriate. The results of your search are displayed in the results grid.

School Management								• ×
🦇 Highland	S	chool					Version: 1.0.5120	Logout
same righteria								User: admin
Home	1	?Edit 💥 Delete 🛛 🍣					Help	à
Dashboard		Last Name	First Name	Middle Name	Home Phone	Cell Phone	Abou	
Resources	4	V]				User	Guide
Find People		Virtueson	Ace					
Backup/Restore		Virtueson	David					
Shutdown		Virtueson	Faith					
License								
Portal Settings								
							>	
Home								
Families								
Students								
Billing								
Inventory								
Reports								
Setup	X	🛛 🔽 Starts with ([Last Nar	ne], 'V')			Edit Fi	terj	

Click to highlight the desired name, then click **Edit.** The Edit Person dialog box will display. Information may be viewed or edited and saved.



NOTE: The user's ability to view information depends on the roles and permissions assigned to him. <u>See page 21</u>.

Backup/Restore

To back up or restore the program database, click **Backup/Restore**. A list of existing backups will display.

🗯 Highlan	d School	Version: 1.0.5189
lome	🛛 🕂 Backup 🕜 Restore 🞇 Delete 🥪	User: admir Help
Dashboard	Backup File Backup Date	About
Resources	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 4/1/2014 2:3	33:06 PM User Guide
Find People	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 3/28/2014 2:	:58:09 PM
	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 3/25/2014 3:	:22:50 PM
Backup/Restore	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 2/25/2014 2:	:30:15 PM
Shutdown	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 2/24/2014 8:	:42:28 AM
License	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 1/17/2014 9:	:56:05 AM
Portal Settings	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 1/16/2014 9:	:54:31 AM

To back up your system, click **Backup**. Choose **Backup Database Now** in the dialog box. You can choose to back up to the default location or to a custom location. A custom location could be another folder on the computer or network, flash drive, or external hard drive. Backups to the default location are included in the list of backup files.

School Management		_ = X
🖇 Highland		/ersion: 1.0.5189 Loqout User: admin
Home	🛟 Backup 🕜 Restore 💥 Delete 🧷	Help 🔝
Dashboard	Backup File Backup Date	About
Resources	C: \Program Files (x86)\School Management System\DBBackups\SchoolManageme 4/1/2014 2:33:06 PM	User Guide
Find People	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 3/28/2014 2:58:09 PM	
Backup/Restore	C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 3/25/2014 3:22:50 PM C:\Program Files (x86)\School Management System\DBBackups\SchoolManageme 2/25/2014 2:30:15 PM	
Shutdown	C: \Program Files (x86)\School Management System\Dbbackups\SchoolManageme 2/23/2014 2:30:15 PM C: \Program Files (x86)\School Management System\DbBackups\SchoolManageme 2/24/2014 2:30:15 PM	
License	C: \Program Files (x86) \School Management System \DBBackups \School Manageme 1/17/2014 9:56:05 AM	
Portal Settings	C: \Program Files (x86) \School Management System \DBBackups \School Management. 1/16/2014 9:54:31 AM	
Portai Seturigs	Backup	
	Do you wish to back up the database?	
	Location	
Home Families	Back Up Database Now - Custom	
Students	Location	
Billing	Cancel Backup	
Inventory		
Reports	Cancel	
Setup		

To restore a backup, select it in the list and click **Restore**. Choose **Restore Database Now** on the dialog displayed.

WARNING: This action will overwrite any existing data.



When you click **Restore**, you can also click **Browse for Other Backup File** and select a backup you have saved in another folder on the computer or network, flash drive, or external hard drive.

To delete an existing backup, select the backup in the list and click **Delete**.

Shutdown

The Shutdown feature allows you to shut down the School Management program for maintenance. A message will be sent to any remote computers running the program. It is recommended that you do not use this feature unless directed by A.C.E.

School Management					x		
🦇 Highland	School		Ve	arsion: 1.0.5120	Logout		
Thymana	School			U	ser: admin		
Home	WADNING	are may be in the middle of work and will not be able to save changes		Help	2		
Dashboard		WARNING: Users may be in the middle of work and will not be able to save changes. They will be notified of the reason for shutdown.					
Resources	· ·			User Gu	uide		
Find People							
Backup/Restore							
Shutdown	Shutdown Reason						
License			$\overline{\mathbf{v}}$				
Portal Settings		Restart service (It may take up to two minutes for the service to restart.)					
Home							
l		Shutdown					
Famílies							
Students							
Billing							
Inventory							
Reports							
Setup							
			-	-	_		

License

School Management requires a valid license file to fully enable all features. Click **License** to manage your license file. Your Portal User Name and Password should have been set in the Portal, but if desired it can be modified here. Click **Download License** if you need to download your license file for any reason.



NOTE: Your school name is automatically set in the program from your license file and cannot be modified. If your school name is displayed incorrectly, you must contact A.C.E. Customer Service to modify it.

School Management						x t
🦇 Highland	School			Ve	ersion: 1.0.5189 U:	Loqout ser: admin
Home	2				Help	۵
Dashboard Resources	Portal User Name	test5070347	Portal Account Status	Success	About User Gi	uide
Find People	Portal Password	Change				
Backup/Restore	License Mode	School Management School Edition				
Shutdown	Customer Name	Highland School	Issued On	10/8/2012		
License	Customer Number	5070347				
Portal Settings						
Home						
Families						
Students		Click the 'Download License' butto download any available license fil restart School Management for lic	e. You may need to			
Billing		effect.				
Inventory		Download Lice	ense			
Reports						
Setup						

Portal Settings

The Portal is the online server accessible with a valid license at <u>www.studentmanage.com</u>. The Portal Settings section shows your account status and allows the Portal Password to be changed. For schools who order from A.C.E. in the United States, the Portal enables School Management to automatically update the catalog, process automatic orders, handle software licenses, and process payments.

To change your Portal Password, click **Change...** Enter your New Password and click **OK**.

For automatic catalog updates, select **Enable Catalog Updates and Electronic Orders** (if available from your warehouse). Updates are pushed through each day at a predetermined time. You may change this time if desired.



CHAPTER 7



Families must be entered in School Management before adding students. Families are added, edited, and managed from the Families menu. **NOTE:** A Billing Plan must be set up before adding families. <u>See page 76</u>.

Browse Families

The Browse Families feature provides a quick view of all families. Families are added, edited, and deleted here.

School Management	School Management							
Wentown 1.05120 Longout Wentown 1.05120 User: admin User: admin								
Families	amilies 💦 🖓 New Family Wizard 🖉 Edit 🞇 Delete 🖉							
Browse Families		Billing Name	Billing Plan	Primary Person	Secondary Person	Family Report		
		Lovejoy, Mr. Robert and Mrs	Church Member	Lovejoy, Mr. Robert	Lovejoy, Mrs. Rachel	Help		
		McMercy, Mr. John and Mrs. Sa	Standard	McMercy, Mr. John	McMercy, Mrs. Sarah			
		Upright, Mr. Charles and Mrs	Church Member	Upright, Mr. Charles	Upright, Mrs. Alice	About User Guide		
		Virtueson, Mr. David and Mrs	Church Member	Virtueson, Mr. David	Virtueson, Mrs. Faith	User Guide		

Adding a Family

To add a family, click **New Family Wizard**. The following steps will display. **NOTE:** Items in bold in the wizard are required fields.

• Adding a new family – This is the startup screen for the wizard. Click **Next**.

Add New Family	Tota Material 2
	Adding a new family
	Let's add a new family.
	Please make sure you have all the necessary information such as the responsible persons (i.e., parents, grandparents, and students).
	To continue, dick Next.
	< Back Next > Cancel



• The Add New Family dialog box will appear.

	Add New Family									
	Primary Person (e.g., Father) This person is responsible for paying the bill (may not necessarily be the primary guardian).									
Prefix		Relationship	Father							
First Name										
Last Name										
Suffix		 Male Female 								
Address 1										
Address 2										
Address 3										
City										
County										
Country	United States									
State/Province	💟 Z	IP/Postal Code	Bold fields are required							
			< Back Next >	Cancel						

- Primary Person Enter the information for the head of the family and click Next.
- Secondary Person Enter the information for the secondary person for the family and click **Next**.
- Billing Information Select the mailing address and choose a Billing Plan. Click **Next**.
- Students Enter student information. To enter multiple students, click the green + icon. To remove a student, click the red x icon. When you have finished entering students, click Next.
- Ready to Create Family Review the summary of actions to be taken. If correct, click **Finish**.

Editing a Family

To edit an existing family, select the family in the list and click **Edit**. Enter text in the following fields in the Edit Family dialog box.

 Primary Person – Click at the end of the name field to select a person or to add a new person. Click the pencil

logical to edit the current person's information. A Primary Person is required for each family.

 Secondary Person – Click at the end of the name field to select a person or to add a new person.

Click the **pencil** to edit the current person's information. Click **S** to delete the Secondary Person.

 Mailing Address – Select an address from the dropdown list. Addresses entered for the Primary and Secondary Persons are displayed.



- Billing Plan Select a Billing Plan from the dropdown list.
- Billing Name The Billing Name for the family is created automatically. To change the Billing Name, enter the desired name in the field and click Automatically Set Billing Name. Clicking Automatically Set Billing Name a second time returns Billing Name to the default setting.
- Students Tab Add and manage student information for the family. It is important that you click Edit on the Students tab, then click the Address tab and select the appropriate mailing address. The program defaults to Use Custom Address and will print blank student address labels if an address is not selected.
- Primary Person Virtueson, Mr. David 2 ... Billing Plan Church Member Secondary Person Virtueson, Mrs. Faith / -- 🗶 Billing Name Virtueson, Mr. David and Mrs. Faith Mailing Address Home - Virtueson, Mr. David Automatically Set Billing Name Students Notes 🛟 New 🧷 Edit 💥 Remove Student Name Level Status Virtueson, Ace Willing, Hudson 1st Level Enrolled Willing, Judson 1st Level Enrolled Save Done
- Notes Tab Add notes for the family.



Deleting a Family

To delete a family, select the family in the list and click **Delete**. A confirmation dialog box will be presented.

Family	2
	Delete Family Lovejoy, Mr. Robert and Mrs. Rachel?
	Delete All associated children/students, billing transactions, and billing history will also be deleted. This action cannot be undone!
	Cancel

Click **Delete** and the family will be removed.

Important: Deleting a family will cause all associated children/students and their academic information to be deleted as well. This action cannot be undone.



CHAPTER 8

Students Section

Academic components are managed and tracked in School Management in a variety of ways. The student must be added before entering and managing student data. The Add Student menu item can be accessed in one of two ways:

- From the Families → Browse Families menu options, click on a family and click Edit. The Edit Family dialog box displays. Click the New tab in the student grid. The Add Student dialog box will appear. Enter the appropriate information.
- From the Students → Browse Students menu options, click New. The Add Student dialog box will appear.

Progress Control

The Progress Control area allows you to view prescribed subjects and scores entered. The Academic Year dropdown list defaults to the current academic year but also allows you to view previous academic years. When a student is selected, the Grade Level for the selected academic year displays in the header row.



To view subjects and scores, select the desired student from the dropdown list. Once a student's information is added, his subjects and assigned PACEs will display. Each PACE is color coded by status–Prescribed, Issued, Ordered, In Stock, Passed, or Failed.



Passing scores display in green, and failing scores display in red.



	PACE	1097	1098	1099	1100	1101	1102	1102
Biology	Score	100.0	93.0	97.5	96.0	92.0	76.0	97.0

The following menu items are included in the Progress Control section:

 New Subject – Click to add a new subject for a student. A Student Subjects dialog box will display.

Stud	ent Subjects ×
Subject Type	
Subject	
Display Name	
No. of PACEs/Units	12 😜
Starting PACE/Unit	1001 😜
Ordering Prerequisite	
Save	Delete Cancel

Non-High School Student

High School Student

Stu	Ide	nt S	Subjects	x
Subject Type		Ren	naining Graduation Requirements	
Subject			Subject	Req. Credits 🗠
		Þ	Algebra I	1.00 📃
Display Name			Algebra II	1.00
No. of PACEs/Units 12 😜			Trigonometry	0.50
Starting PACE/Unit 1001			English III	1.00
			English IV	1.00
Ordering Prerequisite	\sim		English T	1 00 🔛
			Save Delete	Cancel

Select the Subject Type from the dropdown list to populate the available subjects; then choose the desired Subject. The Display Name defaults to the Subject name and in most cases should not be changed. Select the No. of PACEs/Units and Starting PACE/Unit.

The Ordering Prerequisite dropdown list allows you to choose to prevent School Management from ordering two subjects within a subject type at the same time. For instance, if you do not want to automatically order



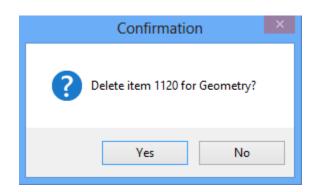
Algebra II PACEs until Algebra I PACEs are complete, select Algebra I from the dropdown list. Leave this value empty if it does not apply.

Click Save to add the subject.

 New PACE – Click to add PACEs to an existing subject, such as gap PACEs. The Add PACE dialog box will appear. Select the Starting PACE/Unit number and the No. (of PACEs) to Add. Click Insert.

	Add PACE
Subject Starting PACE/Unit No. to Add	
	Insert Cancel

 Delete PACE – Click to delete a PACE. Make sure to click on the PACE you wish to delete prior to clicking Delete. A confirmation dialog box will display, allowing you to confirm the delete.



- Acad. Year Displays the current academic year. Other academic years are accessible using this dropdown list.
- Grade Level Displays the student's grade level corresponding to the academic year selected.
- Add Completed Subjects After a Course of Study has been selected in the Academic Projection section, click to add completed subjects. <u>See page 55</u>. This may be necessary for a transfer student or to correct an omission. The Add Completed Subject(s) wizard will walk you through this process.



 Add Completed Subject(s)								
Adding Completed Subject(s)								
This wizard allows you to add a completed subject for a student. This may be necessary for a transfer student or to correct an omission.								
To continue, dick Next.								
< Back Next > Cancel								

NOTE: If a letter grade is added in the Grade field, the letter grade will override a numerical grade entered in the Average field.

	Add Completed Subject(s)									
Subject Information Enter information for the subject(s) being added.										
Subject Type 1. Math	Subject	Is Transfer?		Grade Academic Year r A 2012-2013 💟						

 Ordering Rules – Click to select the curriculum edition you would like to order for this student. The setting of (auto) automatically defaults to Fourth Edition where available. Click in the **Preferred Edition** field of the subject you wish to change.



		Student Ordering Rules	×
	Su	bject Name	Preferred Edition 🔺 🞑
		Geometry	(auto)
		Geometry	(auto)
		Trigonometry	3rd Edition
<i>0</i> .		Math	3rd Edition 💟
	=	Subject Type: Reading Development	Edition
		ABCs with Ace and Christi	Self-Pac
		English As Your Second Language	3rd Edition Activity Pac 3rd Edition
		English Kindergarten	4th Edition
		Kindergarten with Ace and Christi	(auto)
		Math Kindergarten	
		Science Kindergarten	×
		Social Studies Kindergarten	(auto)
			Save Close

- Subject Names/Buttons Each subject name is a clickable button, allowing you to edit the existing subject. Click the subject name to open the Student Subjects dialog box. Modify the values as desired and click Save.
- Run Report This feature on the right panel displays applicable report links for the student. Click any link to run that report for the selected student.

Editing Items in Progress Control

After items have been prescribed to a student in Progress Control, they may be edited by right-clicking the item to display a pop-up menu. The following options are available.

- Issue This allows you to issue the item to the student. This should be done when you are physically handing the PACE to the student. A PACE can only be issued if it is available in inventory. If your School Management user account has administrator permissions or has permission to "Override Inventory," you can override the requirement to have the PACE in inventory before issuing. The PACE is not subtracted from inventory. Caution should be used when overriding inventory to avoid causing errors in inventory amounts. Non-PACE subjects are issued without being tracked in inventory.
- Assign This option will reserve the PACE in your inventory for the selected student.
- Un-Issue This allows you to un-issue a PACE for a student and adds it back into available inventory. If the PACE was issued by overriding the inventory, it is not added back into the available inventory.
- Mark as Passed / Mark as Failed When a score is entered, School Management will automatically mark the item as passed or failed depending on the minimum score set on the Setup > School Configuration screen. In certain situations you may choose to make an exception



and mark an item as passed even if it's below the default minimum score. This option allows you to switch the status of a PACE from Failed to Passed or from Passed to Failed respectively.

- Completion Date The completion date is automatically set as the date you enter the score. If needing to change the completion date of an item, select this option and enter the alternative date.
- Delete This option deletes the selected item but does not add the PACE back into inventory.
- Cancel This option closes the menu.

Adding Basic Literature 7 and 8 to Progress Control

Basic Literature 7 and 8 must be added as non-PACE subjects to allow you to enter grades for each individual Study Guide. Follow these steps to add a non-PACE subject.

 From Setup → Subjects, click New. Enter the subject Name, select the Subject Type from the dropdown list, enter 12 PACEs/Units per 0.5 credit(s), and enter the GPA Weight. Click Is PACE to remove the default checkmark. Enter the Starting and Ending PACE/Unit and click Save.

	Subject	×
Name Lite	rature 8	
Subject Type Lite	rature and Creative Writing	
12	PACEs/Units per 0.5 😜 cr	redit(s)
GPA Weight 10	00 즳 % Starting PACE/Unit	1085 🌏
Is PACE	Ending PACE/Unit	1096 🍚
Is Assignable 🗹	Min. Passing Score	80 😜
	Save	Cancel

 From Students → Progress Control, click New Subject. Select the Subject Type and the Subject from the dropdown lists. Set the No. of PACEs/Units to 12, and set the Starting PACE/Unit appropriately. Click Save. The subject will display in Progress Control.

NOTE: Because Basic Literature 7 and 8 are set up as non-PACE subjects, they have to be billed manually.



School Management		Version: 1.0.5146 Logoul
at Highland (2014)	School	User: admir
Students	💠 New Subject 🛟 New PACE 🞇 Delete PACE 🥪 Acad. Year 2013-2014 🔮 Grade Level: 8	Run Report
Progress Control	Student MdMercy, Sandy Add Completed Subjects Ordering Rules	Supervisor's Progress Report
Academic Projection	-Frescribed -Issued -Crdered -In Stock -Passed -Faled	Permanent
Kindergarten	PACE 1085 1086 1087 1088 1089 1090 1091 1092 1093 1094 1095 1096	Record
ABCs	Math Score	Help
Attendance		About
Goal Check	PACE 1085 1086 1087 1088 1089 1090 1091 1092 1093 1094 1095 1096	User Guide
Homework Assignment	Brigish Score	
Merits and Demerits	PAGE 1085 1086 1087 1088 1089 1090 1091 1092 1093 1094 1095 1096	
Scripture Memory	Literature 8 Score	
Desirable Traits		

- Delete the PACE/Unit numbers not needed for the subject. The remaining PACE/Unit numbers will display in Progress Control. Other non-PACE subjects can be added using these steps.
- **NOTE:** PACE Order Labels will not print for Literature 7 and 8 since they are entered as non-PACE subjects.

Quick Score Entry

This screen provides an entry point for the scores of the currently issued PACE/Unit for multiple students or multiple subjects on one screen. The screen initially opens with one line that can be filled in from left to right With the Student, Subject, PACE/Unit, and the Score. The Completion Date defaults to the day of entry, but the Completed column can be edited if necessary. To add an additional line to enter another score for a different Subject and/or Student, use the "+ Add" at the top.

School Management						
🦇 Highland	School					Version: 1.9.6951 Logou User: admir
Students	🕂 Add 🛛 🛃 Save 🛛 🎇 Clear					Help
Progress Control	Student	Subject	PACE/Unit	Score	Completed	About
Quick Score Entry	Virtueson, Ace	Chemistry	1121	100	10/5/2018	User Guide
Academic Projection	I Virtueson, Ace	Algebra II	1121		10/5/2018	
Kindergarten						
ABCs						
Attendance						

Note: While entries will remain visible on this screen during the same logged in session, scores are not written to students' records until the **Save** option is clicked. Both the Save and Clear option clear all entries.

Academic Projection

In Academic Projection you will manage high school graduation requirements with grids for Graduation Requirements, Current Year Subjects, and Previously Completed Subjects.

Assigning a Course of Study

To view or edit graduation requirements, choose a student from the dropdown list. His Course of Study displays in the header



row. To assign or change a student's Course of Study, make a selection from the dropdown list. The Academic Projection is then populated with values for the student's Graduation Requirements.

												ersion: 1.0.5120	Logout
🦇 Highland	Sc	hool									v		er: admin
Students	St	tudent Lo	ovejoy, Christi	2	Course of Stu	dy	Honors 🔄 为 Remov	e Act	ive 👍 A	Add 🛛 💢 De	lete 🔁	Run Report	Â
Progress Control			Graduation	Requireme	ents	_	Course of Study	-		Credit	s/GPA	High Sc	
Academic Projection		Credits	Subject		Required		College Preparatory General		Credits			Transcr	ipt
Kindergarten	Þ	1.00 😜	English III		\checkmark		Honors		0.0/1.0			Help	2
ABCs		1.00	English IV		\checkmark	Ξ	Vocational		0.0/1.0	Required Electives	22.00 5.00	About	_
Attendance		1.00	Algebra II		\checkmark				0.0/1.0	Total	5.00	User Gu	ide
		0.50	Trigonometr	/	\checkmark				0.0/1.0	Required	27.00 🕃		
Goal Check		1.00	Chemistry		\checkmark				0.0/0.5				
Homework Assignment		1.00	Physics		\checkmark		MUSIC		0.0/0.5				
Merits and Demerits		1.00	American His	tory	\checkmark		Old Testament Survey PE 10		0.0/1.0	Completed Current	7.00 6.00		
Scripture Memory		0.50	Economics		×		PE 10		0.0/0.0	Remaining	14.00		
Desirable Traits		0.50	U.S. Civics		\checkmark					- Containing			
Standardized Testing		0.50	PE 11		~	~				CRA	4.00		
Privilege Status		=Current S	Subject 🔄=	Completed S	·					GFA.	4.00		
					Pi	rev	iously Completed Subjects						
Browse Students		Credi								ge Complete			
Home		1.00								.17 2012-201 .46 2012-201			
Famílies		1.00		History						.46 2012-201	-		
		1.00								.54 2012-201	-		
Students		1.00								.04 2012-201	-		
Billing		0.50								17 2012-201			
Inventory		1.00		estament Su	rvev					42 2012-201	-		
		0.50							90.	.50 2012-201	3		
Reports													
Setup													



The Active button allows you to display only active students or both active and inactive students.

Add a new item by clicking **Add** in the menu bar. Enter the credits and subject.

Delete an existing item by selecting it and clicking **Delete** in the menu bar.

Graduation Requirements

Graduation requirements for the selected student display in the Graduation Requirements grid. This grid includes columns for Credits, Subject, and Required check boxes.

Only subjects included in the Graduation Requirements section of the Academic Projection will be issued high school credit that will display on the student's transcript. If you prescribe additional subjects that are not listed in the default Graduation Requirements, you must add them to Graduation Requirements in order for them to appear on the student's transcript.



NOTE: Items modified in the Graduation Requirements grid affect the selected student **only**. Modifications in this section do not change the Course of Study default values. For example, the College Preparatory Course of Study requires New Testament Survey as a Bible elective. However, a student may also take Old Testament Survey. Old Testament Survey must be added to Graduation Requirements for that student or high school credit will not be given and the course will not display on the transcript.

- Add a new Graduation Requirement by clicking **Add** in the menu bar. Enter the credit and subject.
- Delete an existing Graduation Requirement by selecting it and clicking **Delete** in the menu bar.
- Modify credits by entering new values directly in the Credits field.
- Modify subjects in the dropdown list in each individual Subject field.
- Rename a subject by right-clicking on the desired item and choosing Change Subject Name from the pop-up menu. A dialog box will prompt you for the new name. Enter the desired name and click Save.

Descriptio	n for: Algebra II	×
New Name		
	Save	Cancel

The program highlights the Graduation Requirements in blue or green to indicate which subjects are current or completed.

The student is automatically given high school credit as he completes PACEs or Non-PACE Units that match his Graduation Requirements. In some cases the program is not able to assign these credits automatically. In those situations you can manually link the PACEs or Non-PACE Units to the Graduation Requirement in order to give credit. Some examples of when you might need to link subjects are as follows:

- You are awarding high school credit to a vocational student for PACEs below 1097.
- A student transfers a subject from another school.

To link specific subjects to a Graduation Requirement for a student, right click on the required subject and click **Link Completed Subjects.** A form will display showing all completed PACEs/Units for the subject. Check the items to link them to the Graduation Requirement and click **Save.**



School Management						-			Version	1.0.5120 Logo
半 Highland	Sc	hoc	bl							User: adm
Students	S			Course of Study Honors	Remove	Active		💥 Delete 🛛 🤁	R	in Report
Progress Control	Lir	ık Stu	dent Subject for: P	hysics						High School Transcript
Academic Projection		Link	Linked To	Name	Unit Nur	mber	Score	Completion Date		
Kindergarten	₽								He	elp
ABCs	•			Biology		1097	97.00	9/5/2012		About
Attendance				Biology		1098	100.00	9/4/2012		User Guide
Goal Check				Biology		1099	96.00	9/27/2012		
Homework Assignment				Biology		1100	92.00	11/5/2012		
Merits and Demerits				Biology		1101	96.00	11/27/2012		
				Biology		1102	97.00	12/20/2012		
Scripture Memory				Biology		1103	95.00	2/12/2012		
Desirable Traits				Biology		1104	97.00	2/12/2012		

Current Year Subjects

Subject and Credits columns display in the Current Year Subjects grid. The Credits column shows the number of credits completed and the number of credits possible for each subject.

Previously Completed Subjects

Completed subjects display in the Previously Completed Subjects grid. This area includes Credits, Subject, Average, and (academic year) Completed. These items can be modified:

- Modify credits by entering new values directly in the Credits field.
- Rename subjects by right clicking on the desired item and choosing **Change Subject Name** from the pop-up menu. A dialog box displays that will prompt you for the new name. Enter the desired name and click **Save**.

Description for: Algebra II									
New Name	Algebra II								
		Save	Cancel						

Credits/GPA

This grid displays information related to the student's required credits and GPA.

- Required The number of base credits required for graduation
- Electives The number of elective credits required for graduation

NOTE: In order for the student to receive credit for previously completed subjects, the subjects must be assigned in the Graduation Requirements.



• Total Required – The total number of credits required for graduation. This value can be modified by entering a new value. **NOTE:** Modifying the total required credits will cause the electives value to automatically recalculate.

Kindergarten

This menu item is only enabled when a student is enrolled in a grade level that allows the Kindergarten program.

Kindergarten Lessons

The first time the Kindergarten menu item is accessed for a student, you will be asked if you wish to add Kindergarten lessons. Choose **Add** to assign the lessons. For each lesson displayed, the following areas are available for review.

- Sound Recognition
- Auditory Comprehension
- Oral Work
- Physical Development

Review values for each area are entered using the scale below.

- E Excellent
- G Good
- S Satisfactory
- N Needs Improvement

NOTE: Grades entered for Kindergarten lessons do not save automatically. Make certain to click **Save** before closing or all grades entered will be lost.

ABCs

This menu item is only enabled when a student is enrolled in a grade level that allows the ABCs program.

ABCs Lessons

The first time the ABCs menu item is accessed for a student, you will be asked if you wish to add ABCs lessons. Choose **Add** to assign the lessons. For each lesson displayed, the following areas are available for review.



- Letter Recognition
- Sounding of Letter
- Letter Formation
- Blending of Sounds
- Physical Development
- Bible Memorization (for reference only—this item is not reviewed)

School Management										
Werkers 10.5120 Legant Verkers 10.5120 Legant User: admin										
Students	🚽 Save 🛛 🧟	Post Test Sco	re Po	st Test Date	2			Run Report		
Progress Control Academic Projection	Student Willing,	Hudson						ABCs Progress Report		
Kindergarten	Lesson	Letter Recognition	Sounding of Letter	Letter Formation	Blending of Sounds	Physical Development	Bible Memorization	Help		

Review values for each area are entered using the scale below.

- E Excellent
- G Good
- S Satisfactory
- N Needs Improvement

NOTE: Grades entered for ABCs lessons do not save automatically. Make certain to click **Save** before closing or all grades entered will be lost.

Post Test

Enter the Post Test Score and the Post Test Date in the header row. These items are automatically saved when entered.

Attendance

School Management offers two options for entering attendance. Attendance is a menu item in the Students section that lists all students currently enrolled.

School Management										
🦇 Highland	l So	chool						V	ersion: 1.0.5120	Loqout User: admin
Students	Da	ate 1/21/2014	2						Help	
Progress Control		Student Full Name		Status					About	:
Academic Projection		Lovejoy, Christi		Presi	ent	Absent (E) Absent (U) Tardy (E) Tardy	(U) (Suspended	User (Guide
Kindergarten		McMercy, Sandy		Presi	ent	Absent (E) Absent (U) Tardy (E) Tardy	(U) (Suspended		
ABCs		McMercy, Becky		Pres	ent	Absent (E) Absent (U) Tardy (E) Tardy	(U) (Suspended		
Attendance		McMercy, Bill		Pres	ent	Absent (E) Absent (U) Tardy (E) Tardy	(U) (Suspended		
	I	Upright, Reginald		Presi	ent	Absent (E) Absent (U) Tardy (E) Tardy	(U) (Suspended		
Goal Check		Virtueson, Ace		Presi	ent	Absent (E) Absent (U) Tardy (E) Tardy	(U) (Suspended		
Homework Assignment		Willing, Hudson		Presi	ent	Absent (E) Absent (U) Tardy (E) Tardy	(U) (Suspended		
Merits and Demerits		Willing, Judson		Presi	ent	Absent (E) Absent (U) Tardy (E) Tardy	(U) (Suspended		

By default the date is set to the current day. However, the date can be changed using the dropdown list or by typing a date into



the field. All enrolled students display for the date selected. The following values are available for each student.

- Present The default selection for each student
- Absent (E) Excused absence
- Absent (U) Unexcused absence
- Tardy (E) Excused tardy
- Tardy (U) Unexcused tardy
- Suspended

Values are saved automatically.

Attendance may also be entered for specific students in Goal Check.

Goal Check

Select **Goal Check** to enter goal check-related information for a specific student. Select the student from the appropriate dropdown list. The date defaults to the current day but may be changed as needed.

School Management												
🦇 Highland	School						Ve	ersion: 1.0.5265 Logout				
Students	Student Lovejoy, Chri	sti [Week Including 5/15/2	014 💟 🧟	4			Go to Area 🔹				
Progress Control	ATTENDANCE	ATTENDAIKE										
Academic Projection	Student Full Name		Status					Help				
Kindergarten	 Lovejoy, Christi 											
ABCs	GOAL CHECK 💥 De	elete Goal Nota	tion					User Guide				
Attendance	Subject	Mon	Tues	Wed	Thurs	Fri	_ _					
Goal Check	Geometry		<u></u>			<u> </u>						
Homework Assignment	English III Chemistry		☑									
Merits and Demerits	American History											
Scripture Memory	Life of Christ											
Desirable Traits	Music											
Standardized Testing	PE 11											
Privilege Status	HOMEWORK ASSIGN	MENT 🐈 Ne	w 🥖 Edit 💢 Delete									
Browse Students	Goal Subject	Goal Task	Due On	Completed On	From Page	To Page	Signed On					
Home												
Families			TS ALL NOTES 🕂 Nev									
Students	Date Cr	eated By	Detail	Note								
Billing												
Inventory												
Reports												
Setup												



Entering Attendance Information

With the current day selected in the **Week Including** dropdown list, select the correct status in the Attendance grid.

Entering Goal Check Information

The current subjects display for the selected student. Select the desired Goal Check status from the dropdown list in the correct day for each corresponding subject. Items are saved automatically.

Adding a Homework Assignment

School Management offers two options for entering homework assignments.

To add a homework assignment in Goal Check for a selected student, select **New** on the Homework Assignment header row. The Add New Homework Assignment form will display.

		Add N	lew Home	work Assignr	nent	x
Student				Assigned On	7/2/2014	
Subject			2	Due On	7/3/2014	
Task						
From Page		To Page				
Notes						
Signed On	Not Signed		2			Is Printed 📃
Completed On	Not Completed				Save	Done

- Assigned On Select the date in the **Week Including** field.
- Due On Select the date following the Assigned On date. NOTE: Dates can be changed by using the dropdown list or by typing the desired date in the appropriate field.
- Subject Select a subject from the dropdown list.
- Task Defaults to Finish Goal Pages. Modify this field by highlighting and typing a different task.
- From Page Enter the first page of homework.
- To Page Enter the last page of homework.
- Notes Type a message for the parent or student if desired.



Click **Save** when all information has been entered. If the selected student has homework in other subjects, add it by following the above steps. When all homework for the selected student has been entered, click **Done**. A summary of the homework will appear in the Homework Assignment grid of the Goal Check Report.

ege Status	Ho	mework Assignmer	nt 🕂 New 🖉 Edit	t 💥 Delete				
se Students		Goal Subject	Goal Task	Due On	Completed On	From Page	To Page	Signed On
e stadents	Þ		Finish Goal Pages	1/22/2014				
		Physical Science	Finish Goal Pages	1/22/2014		5	7	
		Geometry	Finish Goal Pages	1/22/2014		12	14	

To edit a homework assignment, select the subject and click **Edit**. The Edit Homework Assignment form will appear. Make necessary changes and click **Save.** Click **Done** when there are no additional entries to edit.

	Edit Homework Assignment												
Student	Lovejoy, Christ	i		Assigned On	7/2/2014								
Subject	English		2	Due On	7/3/2014								
Task	Finish Goal Page	es											
From Page	27	To Page	28										
Notes													
Signed On	Not Signed					Is Printed 📃							
Completed On	Not Completed				Save	Done							

Click **Delete** to delete a selected homework assignment.

Homework may also be managed in the menu item **Students** \rightarrow **Homework**.

Goal Notes

Goal Notes are managed in the bottom grid.

- Merits and Demerits Click to display a list of all merits and demerits received. Merits and demerits can be added here by selecting New.
- All Notes Click to display a list of notes entered for the selected student.
- New Click New to add a note for a selected student. The Add Note form will display. Use the dropdown lists to populate the Date, Note Type, and Note Subtype fields. Additional information can be typed in the Text box. Click



Save when all information is complete. The note will appear in the Goal Notes grid.

- Edit Select the note in the grid and click Edit.
- Delete Select the note in the grid and click **Delete**.

Homework Assignment

Homework assignments can be managed in this menu item. By default, only homework assignments not completed are displayed. To show all assignments, click **Show Completed** on the header row.

 New – Selecting New will display the Add New Homework Assignment form containing these fields: Student, Subject, Task, Assigned On, Due On, From Page, To Page, Notes, Signed On, Completed On, and Is Printed.

		Add N	lew Home	vork Assignr	nent	x
Student			·	Assigned On	7/2/2014	
Subject				Due On	7/3/2014	
Task						
From Page		To Page				
Notes						
Signed On	Not Signed					Is Printed
Completed On	Not Completed				Save	Done

Enter the appropriate values and click **Save** to create the printable Homework Assignment.

- Edit Select the item you wish to edit and click Edit. The Edit Homework Assignment form displays. After making edits, click Save.
- Delete Select the desired homework assignment and click **Delete**.
- Print Selected Select the homework assignment to print and click **Print Selected**.
- Print Unprinted Select this option to print all unprinted homework assignments.



Merits and Demerits

Merits and demerits are managed in this menu item.

School Management								<u> </u>	
Westow: 1.0.5120 Locaut Westow: 1.0.5120 Locaut User: admin									
Students	🕂 New 🖉 Edi	t 💥 Delete 🦷	я Я					Help 🔝	
Progress Control Academic Projection	Student McMercy	r, Becky						About User Guide	
Kindergarten	For Date	Created By	Type	Subtype	Merits	Demerits	Text		
ABCs									
Attendance									
Goal Check									
Homework Assignment									
Merits and Demerits									

Select a student from the dropdown list.

 New – Click New to display the Add Note form. All merits and demerits are generated in a student note. Complete all fields and click Save.

Add Note to S	tudent McMercy, Becky			×
Created By	admin	Created On	1/21/2014 3:05:51 PM	
Updated By		Updated On		
Date	1/21/2014			
Note Type	Disciplinary	Demerits	μ 😜	
Subject Type	Disruption		Readable on Parent Portal	
Text	Becky was talking without pemission in the L	earning Center.		~
				\sim
			Save	Cancel

The entry will display in the Merits and Demerits grid.

School Management									
Keriar 1.0.5120 Logout Version: 1.0.5120 Logout User: admin									
Students	4	New 🥖 Ed	it 💢 Delete	2					Help
Progress Control Academic Projection	St	udent McMerc	y, Becky						About User Guide
Kindergarten		For Date	Created By	Туре	Subtype	Merits	Demerits	Text	
ABCs	P.	1/21/2014	admin	Merits	Act of Kindness	25		Becky was observed helping Hudson h	
		1/21/2014	admin	Disciplinary	Disruption		1	Becky was talking without pemission in	
Attendance									
Goal Check									
Homework Assignment									
Merits and Demerits									

- Edit Select the item you wish to edit and click Edit. The Edit Existing Note form will display. Make all desired changes and click **Save**.
- Delete Select the item you wish to delete and click **Delete**.



Scripture Memory

Manage Scripture Memory assignments in this menu item. All current assignments display in the grid.

School Management								
Wentow 10.5120 Logov User: admir								
Students	4	🕨 New 🥖 Edit 🞇 Delete	Y- 2			Help		
Progress Control		Passage	Start Date	Due Date	Created By	About		
Academic Projection	•	2 Timothy 1: 1-5	8/20/2012	9/28/2012	admin	User Guide		
Kindergarten		2 Timothy 1:1-9	8/20/2012	9/28/2012	admin			
ABCs		2 Timothy 1:11-14	10/1/2012	10/31/2012	admin			
Attendance		2 Timothy 1:10-18	10/1/2012	10/31/2012	admin			
		2 Timothy 2:1-4	11/1/2012	11/30/2012	admin			
Goal Check		2 Timothy 2:1-13	11/1/2012	11/30/2012	admin			
Homework Assignment		2 Timothy 2:22-26	12/1/2012	12/20/2012	admin			
Merits and Demerits		2 Timothy 2:14-26	12/1/2012	12/20/2012	admin			
Scripture Memory		2 Timothy 3:1-5	1/5/2013	1/30/2013	admin			
Desirable Tesite		2 Timothy 3:1-9	1/5/2013	1/30/2013	admin			

The following actions are available from the Scripture Memory menu item:

- New Select **New** to display the Add New Scripture Assignment form. After adding a new Scripture passage, click **Save** before assigning the passage to students.
- Edit Select the assignment you wish to edit and click **Edit**. The Edit Scripture Assignment form will display.
- Delete Select the assignment you wish to delete and click **Delete**.
- Filter Select this to toggle between Just My Students or all students in the Scripture assignment grid.

Add/Edit Scripture Assignment

When adding or editing a Scripture Memory assignment, the following fields can be modified:

- Passage Add the Scripture reference.
- Start Date Add the date manually, or select using the dropdown calendar.
- Due Date Add the date manually, or select using the dropdown calendar.



		Edit Scripture	e Assignm	ent	x
Created By	admin				
Passage	Genesis 1				
Start Date	7/1/2014	2	Due Date	7/15/2014	
Assigned Stu	idents				
🗣 Assign T	ʻo 👻 💢 Unassign 👘				
Student				Completed Date	
Lovejoy, C	Christi				
				Save	Cancel

In the Assign To dropdown list, assign the Scripture to My Students, All Current Students, Select Student, or Select Learning Center.

To unassign a student, select the student and click **Unassign**.

To enter a completion date for a student, click **Edit** and type the date in the Completed Date field. Or select the date using the dropdown calendar. Click **Save** when you have finished modifying items.



Desirable Traits

School Management						ersion: 1.0.5120 Logout
🦇 Highland	School				•	User: admin
Students	Student 🖸 🧟					Help
Progress Control Academic Projection Kindergariten ABCs Attendance Goal Check Homework Assignment Merits and Demerits Scripture Memory Describle Traits Standardizet Testing Privlege Stubus Browse Students	Trait Category: Work Habits Follows Directons Works Well Independently Does Not Disturb Others Takes Care of Materials Completes Work Required Achieves Computer Assignments Gategory: Sodal Traits Is Courteous Gets Along Well with Others Exhibits Self-Control Shows Respect for Authonity Responds Well to Correction Promotes School Spirit Category: Personal Traits	1 G G G G G G G G E E G	2 G E E G G G G G E E G	3 G E E E E E E E E E E G	4 G E E E G E E E E E E E E G	About User Guide
Home Families Students Billing Inventory Reports Setup	Abity to Establish Own Goals Successfully Reaches Goals Displays Flexibility Shows Creativity General Overall Progress Attitude Toward Computer Learning	G E G G	E G G G G	E E G E G	E E G E G	

Manage Desirable Traits in this menu option.

Select the desired student from the **Student** dropdown list. Desirable traits are displayed with columns for each academic year period. Enter values in the appropriate columns using the following scale:

- E Excellent
- G Good
- S Satisfactory
- N Needs Improvement

Entered items are automatically saved.

Standardized Testing

The Standardized Testing menu option allows you to manage standardized test scores for a student. Before entering scores, you must configure Standardized Tests in the Setup section. <u>See page 29</u>.

- New Click New to display the Add New Standardized Test Score form.
 - Student Select a student to add scores.



- Test Select the standardized test for which you are adding scores.
- Taken On Select the date the test was taken.
- Score Areas Enter the score for each section. Click Save.
- Edit To edit an existing score or test date, select a student and click Edit. The Edit Standardized Test form displays. Make all changes and click Save.
- Delete Select the student whose scores you wish to delete and click **Delete**.

Privilege Status

The Privilege Status menu option allows for quick entry of weekly privilege status for all students.

School Management						
Weniow: 1.0.5189						
Students	🕂 Add 🖼 Save 💥 Clear			Help 🔉		
Progress Control	Student	Privilege Status	Week Of	About		
Academic Projection	I Lovejoy, Christi	E 💟	4/4/2014	User Guide		
Kindergarten			4/4/2014			
ABCs						
Attendance						
Goal Check						
Homework Assignment						
Merits and Demerits						
Scripture Memory						
Desirable Traits						
Standardized Testing						
Privilege Status						

This menu item is for quick entry only. Entered data will be moved from Privilege Status into Goal Notes when you log out of the program. View the entered privilege status in **Students** → **Goal Check**. Select a student. In the Goal Notes grid, click **All Notes**. The student's privilege status for the week will display as a note.

•	GO	DAL NOTES MERI	TS AND DEMER	ITS ALL NOTES	🕂 New 🖉 Edit 💢	Delete
		Date	Created By	Note Type	Detail	Note
	Þ	5/17/2014	admin	Privilege	E	

- Add To enter privilege status for a student, click Add. Select a student and privilege status from the appropriate dropdown list. The Week Of field defaults to the current date.
- Clear Clears all data from Privilege Status.



Browse Students

The Browse Students menu option allows for a quick view of all students by academic year.

5		lool					User: adm
tudents	-	New 🥖 Edit 💢 Delet	te Acad. Year 2012-2013	🗹 🔽 - 🏹			Go to Area
Progress Control	N	lame	Level	Status	Acader	nic Year	Merits and De
Academic Projection		Supervisor: Content, M	iss Ann J.				Run Report
Kindergarten		Willing, Hudson	K5		Enrolled 2012-2	013	
ABCs		Willing, Judson	K5		Enrolled 2012-2	013	Subject List
Attendance		Supervisor: Friendson, I	Mr. Paul B.				Help
		McMercy, Becky	3rd Level		Enrolled 2012-2	013	About
Goal Check		McMercy, Sandy	7th Level		Enrolled 2012-2	013	User Guide
Homework Assignment		Lovejoy, Christi	Freshman		Enrolled 2012-2	013	
Merits and Demerits	Þ	Upright, Reginald	Freshman		Enrolled 2012-2	013	
Scripture Memory		Virtueson, Ace	Freshman		Enrolled 2012-2	013	
		McMercy, Bill	Junior		Enrolled 2012-2	013	
Decirable Traite							
Desirable Traits Standardized Testing	-						

Changing the year in the Acad. Year dropdown list will display the students for that academic year.

udents	4	New 🥖 Edit 💥 Delete	Acad. Year 2013-2014	🖸 🛛 - 🌫			Go to Area
Progress Control		Name	Level	Status	Ŷ	Academic Year	Merits and D
Academic Projection		Supervisor: Friendson, N	1r. Paul B.				Run Report
Kindergarten		Willing, Hudson	1st Level		Enrolled	2013-2014	
ABCs		Willing, Judson	1st Level		Enrolled	2013-2014	Subject List
Attendance		McMercy, Becky	4th Level		Enrolled	2013-2014	Help
		McMercy, Sandy	8th Level		Enrolled	2013-2014	About
Goal Check	•	Lovejoy, Christi	Sophomore		Enrolled	2013-2014	User Guide
Homework Assignment		Upright, Reginald	Sophomore		Enrolled	2013-2014	
Merits and Demerits		Virtueson, Ace	Sophomore		Enrolled	2013-2014	
Scripture Memory		McMercy, Bill	Senior		Enrolled	2013-2014	
Desirable Traits							
Standardized Testing							
ramaa accorreading							

This menu item also allows the following actions:

- New The Add Student form displays.
- Edit The Edit Student form displays allowing the user to make changes to the student's information.
- Delete Delete the selected student.
- Filter Filter the display and grouping of students for the academic year.



Adding a Student

Click **New** for the Add Student form to display. The following fields can be modified:

- First Name
- Middle Name
- Last Name
- Family
- Gender
- Birthday
- Student ID
- Citizenship
- Date Graduated

Tabs for additional student information are located on the Add Student and Edit Student forms.

Add Student						X			
	First Name			Gender					
	Middle Name			Birthday					
[None]	[None] Last Name Family				Student ID				
				Citizenship					
			C	ate Graduated					
Levels Notes Relation	Levels Notes Relationships Contact Info Address								
슈 Enroll 为 Withdraw									
Academic Year	Level	Superv	Supervisor Status			Enrollment Date			

Levels

This tab displays the student's Academic Year, Level, Supervisor, enrollment Status, and Enrollment Date for each year they were enrolled.

- To withdraw the student, click the appropriate level and click **Withdraw**.
- To enroll the student in a new level, click **Enroll** and make the appropriate selections.

Notes

This tab displays the notes for the student.

• To add a note, click **New** and enter the note information in the Add Note form.



- To edit an existing note, select the note and click Edit.
- To delete an existing note, select the note and click **Delete**.

Relationships

This tab displays Relationships for the student, including, but not limited to, Father, Mother, and Grandparent.

- To add a Relationship, click **New**. Select a person and modify the appropriate information.
- To delete a Relationship, select the Relationship and click **Delete**.

Contact Info

This tab displays fields for the contact information listed below.

- Cell Phone
- Home Phone
- Work Phone
- Other Phone
- Email Address
- Twitter
- Facebook
- Website

Address

This tab displays addresses for a student. If relationships are defined, you can select from those options. Or, enter a custom address for the student.

Editing a Student

Select an existing student in the Browse Students menu option and click **Edit**. Make the appropriate changes in the Edit Student form and click **Save**.

Deleting a Student

To delete an existing student, select the student and click **Delete**. This action will delete **all** existing information for the student, including school progress, grades, notes, and anything else you have entered for that student. **IMPORTANT: This action is permanent and cannot be undone!**



CHAPTER 9

Billing Section

Account balances, financial transactions, and billing activity are managed from the Billing menu.

School Management			- D X
🦇 Highland	School	v	ersion: 1.0.5120 <u>Loqout</u> User: admin
Billing	🗃 Print 🦉		Run Report 🛛 🔊
Balances	Name	Current Balance	Balance Report
Transactions	Lovejoy, Mr. Robert and Mrs. Rachel	\$768.15	Help 🚵
Biling Runs	McMercy, Mr. John and Mrs. Sarah	\$2,701.89	About
Billing Plans	Upright, Mr. Charles and Mrs. Alice	\$627.60	User Guide
	Virtueson, Mr. David and Mrs. Faith	\$1,212.32	
Home			
Families			
Students			
Billing			
Inventory			
Reports			
Setup		Total: \$5,309.96	

Balances

The Balances menu item allows you to view the current outstanding balance for each family in School Management. To run the Balance Report, click **Print**.

Transactions

The Transactions menu item allows you to view, enter, and manage transactions for a family. Choose the family to manage from the Family dropdown list.

Adding a Manual Transaction

To add a manual transaction, enter the details in the Post Transaction area.



School Management							Ve	rsion: 1.0.5120	Logou
🗯 Highlan	d School								r: admi
Billing	Family Loveir	w Mr R	obert and Mrs. Rach	el 💟				Run Report	
Balances								Transactio	on
Transactions	Post Transactio	1						Report	
Billing Runs	Transaction Dat	e 1/22/2	2014 💟	Amount		768.15		Help	
Billing Plans	Check No	. 2268		Transaction Type	Payment			About	
	Descriptio	n Tuition	and PACE fees					User Guid	e
	Detail	s Accou	int paid in full.						
	🤊 Reverse 🧋	8							
lome	Trans Type		Date	Amount Descr	iption				
amilies	▶ Pi	ayment	1/14/2014	271.00 Septe	mber Tuition and PACEs				
tudents		Debit	1/13/2014	302.50 Rever	sing transaction for: August Tu	ition and PACEs	_		
tudents	Pi	syment	1/13/2014	302.50 Augus	st Tuition and PACEs				
lling		Debit	12/1/2012	250.00 Tuition	n for Christi				
nventory		Debit	11/1/2012	250.00 Tuition					
leports		Debit	11/1/2012		fees for Lovejoy, Christi				
		Debit	10/1/2012	250.00 Tuitio					
Setup		Debit	10/1/2012	21.00 PACE	fees for Lovejoy, Christi				

Enter information in the following fields:

- Transaction Date Date of the transaction
- Amount Amount of the transaction
- Check No. (optional) The number of the check when the transaction type is Payment
- Transaction Type Type of transaction including Debit, Payment, and Credit
- Description A brief description of the transaction
- Details (optional) A more detailed description of the transaction if desired

Click **Save** to post the transaction.

Viewing Transactions

The lower half of the Transactions screen displays transactions for the currently selected family.

Reversing a Transaction

Reversing a transaction enters a corresponding transaction of the opposite type into the system. This action has the effect of canceling a previous transaction. To reverse a transaction, select the transaction in the grid and click **Reverse**.

Deleting a Transaction

When a transaction is deleted, the record is completely removed, unlike when reversing a transaction. To delete, select the transaction in the grid and click **Delete**. You will only be allowed to delete transactions entered since the last billing run. Transactions from previous billing runs cannot be deleted.



Miscellaneous Fees

Miscellaneous fees (Basic Literature 7, Basic Literature 8, Rosetta Stone, graduation fees, activity fees, etc.) can be billed to a family account one of two ways.

- Fees can be added manually to each individual family to which they apply by adding a manual transaction. <u>See</u> <u>page 73</u>. This method gives you the option of entering the fee monthly, or as a single transaction.
- Fees can also be added by creating a specific billing plan that bills the fee as a part of the families tuition cost. For example, the tuition for 7th level students taking Basic Literature would include the price of the Literature PACEs in the tuition cost for that grade level. Using this option, the total Miscellaneous Fees would be divided and billed monthly.

Billing Runs

The Billing Runs menu item displays all previous billing runs in School Management. A billing run is the process that posts all tuition and PACE charges for a specific period. It also posts and reconciles all accounts and transactions that have been entered since the last billing run.

School Manageme	nt					_	
Wersion: 1.6.120 Lacoust Lacou							
Billing	4	🕨 New 💥 Delet	te 🤁				Help
Balances		Bill Date	Run Date	Total Transactions	Credits	Debits	About
Transactions	•	8/1/2012	1/13/2014	4	\$66.25	\$2,050.00	User Guide
Billing Runs		9/1/2012	1/13/2014	4	\$3,820.50	\$3,460.00	
Billing Plans		10/1/2012	1/13/2014	4	\$1,689.50	\$2,179.50	
		11/1/2012	1/15/2014	4	\$2,179.50	\$3,377.97	
		12/1/2012	1/15/2014	4	\$66.25	\$2,064.48	

The following actions are available:

 New – Adds a new Billing Run. This action displays the Bill Run processing form. Select the date for the Bill Run and click **Process**.

Bill F	Run ×
Billing Date 7/2/2	2014
Process	Cancel



• Delete – Deletes a previous billing run. This action will roll back all transactions that were posted with the billing run.

Billing Plans

The Billing Plans menu item displays all billing plans currently configured in School Management.

School Management				
🦇 Highland	d School		Ve	rsion: 1.0.5120 <u>Loqout</u> User: admin
Billing	🚽 🕂 New 🧷 Edit 🞇 Delete 🧭			Help 🔓
Balances	Name	Billing Cycles	Discount (%)	About
Transactions	Church Member	10	.00%	User Guide
Billing Runs	Standard	10	.00%	
Billing Plans				

The following actions are available:

- New Adds a new billing plan. This action displays the Add Billing Plan form.
- Edit Allows you to edit an existing Billing Plan. Select the plan you wish to edit and click **Edit**. The Edit Billing Plan form displays.
- Delete Allows you to delete an existing Billing Plan. Click the **plan** you wish to delete and click **Delete**.

Adding/Editing a Billing Plan

When adding a new Billing Plan, enter the Name and the number of Billing Months desired. Click **Save**.

		Add Bil	ling Plan	×
Name Billing Months	Members]	Save Close

When adding or editing a Billing Plan, the following areas and fields are available for modification:

- Tuition Amounts (Annual) Allows you to designate the amount for each level. If you wish to charge the same amount for all levels, enter a value in Annual Tuition for the level at the top of the list and click Save. Click Make All Same.
- Discounts Allows you to add discounts for this Billing Plan. All discounts are calculated as a percentage of the tuition amount. An overall discount can be added as well



as discounts for the number of children enrolled up to a total of ten children. If you wish to make all discounts the same, enter a value for 2nd Child and click Save. Click Make All Same.

 Months to Bill – Allows you to designate which months to bill for tuition. Note that the number of months selected should match the Billing Months value. Click the box by the months you plan to bill tuition.

		Edit Billing Plan	-	
Name	Members			
Billing Months	9 😜			
Tuition Amounts (Annual)	Level	Annual Tuition	Months to Bill Select All	_
Make All Same	🕨 КЗ	\$1,250.00	✓ Feb ✓ Aug ✓ Mar ✓ Sep	
	Pre-K	\$1,250.00	Apr V Oct	
	К4	\$1,500.00	May 🔽 Nov	
	К5	\$2,000.00	🔄 Jun 🗹 Dec	8
	1st Level	\$2,000.00		
	2nd Level	\$2,000.00		
	3rd Level	\$2,000.00		
	4th Level	\$2,000.00		
	5th Level	\$2,000.00 🔽		
Discounts Make All Same	Overall 0 😂 %			
<u>riane ranoanne</u>	2nd Child 5 😜 %	7th Child 100 🍚 %		
	3rd Child 10 😜 %	8th Child 100 🍚 %		
	4th Child 15 🍚 %	9th Child 100 즳 %		
	5th Child 50 🍣 %	10th Child 🛛 100 🍣 %		
	6th Child 50 🕃 %		Save Close	

Batch Transactions

The Batch Transactions menu item allows you to create and assign transactions to multiple families or students at once. This can be used for any transaction type that needs to be applied to multiple families. Examples are field trip fees, enrollment fees, graduation fees, staff family credits, scholarships, etc. You can set up the batch transaction once, and quickly apply it to multiple families or students.



	School Management – 🗖 💌					
Highland	School				Vi	ersion: 1.5.5643 Loqout User: 1
Billing	🕂 New 🖉 Edit 💢 Delete 🕜 Apply Transactio	n 🤁				Help 🔉
Balances	Name	Amount	Туре	Apply To	Last Run Date	About
Transactions	December Field Trip	15.00	Debit	Students		User Guide
Billing Runs						
Billing Plans						
Batch Transactions						

The following actions are available:

- New Adds a new batch transaction. This action displays a new Batch Transaction form.
- Edit Allows you to edit an existing batch transaction. Select the batch transaction you wish to edit and click Edit. The Batch Transaction form displays.
- Delete Allows you to delete an existing batch transaction. Click the batch transaction you wish to delete and click **Delete**.
- Apply Transaction Allows you to apply a batch transaction to families or students. Click the batch transaction you wish to apply and click **Apply Transaction**.

Adding/Editing a Batch Transaction

When adding or editing a batch transaction, enter data in all the fields and click **Save**.

		Bato	h Transaction		×
Description	[New Batch Transaction]				
Amount	0				
Apply To	Students		Transaction Type	Debit 🗧	
Details				~	
					<u> 1</u>
				Save Close	
		_			

When adding or editing a batch transaction, the following fields are available for modification:

- Description Allows you to designate a name for the batch transaction.
- Amount Allows you to enter the monetary amount for the batch transaction.



- Apply To Switches the batch transaction from a perstudent transaction to a per-family transaction. This affects who is impacted when you apply the transaction.
- Transaction Type Options are Debit, Payment, and Credit.
- Details Allows you to add notes about this transaction.

Applying a Batch Transaction

When selecting **Apply Transaction**, the Batch Transaction – Apply screen will display a list of students or families depending on the Apply To option for the selected batch transaction.

		Bat	ch Transaction - A	pply				x
Description [Dece	ember Field Trip						
Apply To S	Stud	ents		Amo	ount	\$15.00		
Transaction Type	Debi	t	1	Transaction [)ate	6/15/2015		
Applies To		Name	Family Name	Grade Level	Supe	ervisor	Apply	
Unselect All	Þ	Lovejoy, Christi	Tolle, Dennis				~	
		McMercy, Becky	Tolle, Dennis				~	
		Meekway, Pudge	Tolle, Dennis				~	
		Upright, Reginald	Tooley, Jeremy				~	
		Virtueson, Ace	Tipton, Cynthia				~	
9	5ho	w Students for 2015	-2016		A	Apply	Close	

Enter a **Transaction Date**, select the students or families to apply the transaction to, and click **Apply**. This will add the transaction to each of the selected families or students. You can then open the **Transactions** menu to see the applied transactions for each family.



CHAPTER 10



Ordering, inventory, and catalog items are all managed from the Inventory menu.

Orders

The Orders menu item allows you to manage existing inventory orders. This list includes automatic orders sent to A.C.E., as well as any manual inventory orders you may have entered. The following actions are available:

- New Allows you to create a new automatic or manual inventory order. This action displays the Create Order form.
- Edit Allows you to edit/manage an existing order. Click the desired order and then click **Edit**.
- Delete Allows you to delete an existing order. Click the desired order and then click **Delete**.

Filtering Orders

By default, the Orders menu item only shows orders from the last 90 days that have not been received. The filter button on the menu bar allows you to change this filter. Selected filters include a check mark beside them in the dropdown filter menu. Available filters include:

- Include Received Orders (This item can be selected with any other item below.)
- Past 90 Days
- Past 180 Days
- Past Year
- All Past Orders

Creating an Automatic Order

Automatic ordering is available when ordering PACEs from A.C.E. When initiating an automatic order, you can select which students to include. This process checks the academic prescription for the selected students, compares the number of PACEs available in each instance, and orders the number of



PACEs required. When selecting students, you can change the number of PACEs to order ahead for a student.

On an automatic order, you can also check the box to **Replenish PACE Inventory**. This will scan your inventory and will add to the order any items needed to meet the **Auto-Stock** amounts set in the Inventory > Catalog screen. <u>See page 87</u> for editing your **Auto-Stock** amounts.

For automatic orders, the supplier is A.C.E. The PO number is automatically created for you. However, if you wish to create a new PO number, click the **plus** button. Finally, click **Apply and Order** to start the automatic ordering process and continue to the Edit Order form.

		Edit Order		×
🛃 Ready to Send 🛛 🍯 Pri	nt Copy 📙 Save to File 🥥 Send Now			
Supplier A.C.E. PO # 140702113639 Order Status Open	Ship Via BEST Shipping Address Send via Web	WAY 🔮		
	Explain Why			
Item #	Quantity Name	Unit Number	Retail Price Unit P	rice Total Price 🛆
• 00007109	1 English II			3.30 3.30
00007110	1 English II	1110	3.30 3	3.30 3.30
00007111	1 English II	1111	3.30 3	3.30 3.30 😑
00006509	1 Geometry	1109	3.30 3	3.30 3.30
00006510	1 Geometry	1110	3.30 3	3.30 3.30
00006511	1 Geometry	1111	3.30 3	3.30 3.30
00408121	1 American History	1121	3.50 3	3.50 3.50
00408122	1 American History	1122	3.50 3	3.50 3.50
00408123	1 American History	1123	3.50	3.50 3.50
00009109 Unique Items: 15 Tota	1 Physical Science al Qty: 15	1109	3.30 3	3.30 3.30 Est. Total \$49.20
				Close

The Edit Order form displays items that will be ordered. Review and complete the order by taking the following steps:

- Select a shipping method using the Ship Via dropdown list.
- Select the desired shipping address from the Shipping Address dropdown list.
- If this order will be submitted via the Internet from School Management, make sure the Send via Web check box is selected. <u>See page 84</u> for instructions on uploading a manual order file.
- Additional items can be added and existing items can be deleted from the order if desired using the Add and Remove buttons.
- On the **By Students** tab, the items in the automatic order will be listed with the assigned student's name.
- Click **Ready to Send** to prepare the order for submission.



Once the order has been prepared for submission, the following actions are available:

- Re-open Order Allows you to re-open the order for editing.
- Print Copy Prints the Order Report for this order.
- Save to File Saves this order to a file for manual off-site submission. <u>See page 84</u>.
- Send Now Submits this order to A.C.E. via the Internet.
- The order status is updated periodically in the School Management web portal. The status history can be seen by going to <u>www.studentmanage.com</u> and clicking on the **Orders** tab. Possible status items include:
 - Received Order has been received by A.C.E. If an item on your order has been discontinued or substituted for a new item, you will get a status update indicating that change. Your order will be updated to reflect that change.
 - Submitted Order has been submitted to A.C.E.
 - OnHold Order has been processed and A.C.E. is awaiting payment. A Pay for Order link will appear when an order has this status. Clicking the link will open a payment page in your web browser, allowing you to pay online via credit card. If you don't wish to pay online, you must call A.C.E. to make payment arrangements for your order.
 - Processing Order is being prepared for shipment.
 - InvoicedComplete Order has been prepared and is awaiting shipment or has been shipped. Tracking numbers, if available, will be displayed when an order has this status.

Creating a Manual Order

Manual ordering is to be used when ordering Non-PACE items from A.C.E. or for ordering from other suppliers. To create a manual order, click **New** and select **Manual Order**. Select the desired supplier from the Supplier dropdown list. The PO number is automatically created for you. However, if you wish to create a new PO, click the **plus** button. Finally, click **Create Order** to continue to the Edit Order form.

On the Edit Order form, you must enter items you wish to order manually. Select **Add**, then search for items by clicking the **search button** under Item #. After adding an item to the order, click **Add** to insert a new row. Continue this process until you



have completed the order. Review and complete the order by taking the following steps:

- Select a shipping method using the Ship Via dropdown list.
- Select the desired shipping address from the Shipping Address dropdown list.
- If this order will be submitted via the Internet from School Management, make sure the Send via Web check box is selected. See below for instructions on uploading a manual order file.
- Click **Ready to Send** to prepare the order for submission.

Once the order has been prepared for submission, the following actions are available for the order:

- Re-open Order Allows you to re-open the order for editing.
- Print Copy Prints the Order Report for this order.
- Save to File Saves this order to a file for manual off-site submission (see below).
- Send Now Submits this order to A.C.E. via the Internet.
- The order status is updated periodically in the School Management web portal. The status history can be seen by going to <u>www.studentmanage.com</u> and clicking on the **Order** tab. Possible status items include:
 - Received Order has been received by A.C.E.
 - Submitted Order has been submitted to A.C.E.
 - OnHold Order has been processed and A.C.E. is awaiting payment. A **Pay for Order** link will appear when an order has this status. Clicking the link will open a payment page in your web browser, allowing you to pay online via credit card. If you don't wish to pay online, you must call A.C.E. to make payment arrangements for your order.
 - Processing Order is being prepared for shipment.
 - InvoicedComplete Order has been prepared and is awaiting shipment or has been shipped. Tracking numbers, if available, will be displayed when an order has this status.



Uploading a Manual Order File

If you do not have Internet access, an order file may be uploaded from an off-site computer.

- From the Edit Order menu item, click Save to File.
- **Save** the file to an external hard drive, flash drive, or other portable device to transport it to a computer with Internet access.
- Log in to the Portal at <u>www.studentmanage.com</u>.
- Click the **Orders** tab.
- Click Upload Manual Order File.
- Navigate to the order file and click Upload.
- The order status is updated periodically in the School Management web portal. The status history can be seen by going to <u>www.studentmanage.com</u> and clicking on the **Order** tab. Possible status items include:
 - Received Order has been received by A.C.E.
 - Submitted Order has been submitted to A.C.E.
 - OnHold Order has been processed and A.C.E. is awaiting payment. A **Pay for Order** link will appear when an order has this status. Clicking the link will open a payment page in your web browser, allowing you to pay online via credit card. If you don't wish to pay online, you must call A.C.E. to make payment arrangements for your order.
 - Processing Order is being prepared for shipment.
 - InvoicedComplete Order has been prepared and is awaiting shipment or has been shipped. Tracking numbers, if available, will be displayed when an order has this status.

Editing an Order

Orders can only be edited if they have not been submitted to A.C.E. electronically, saved to a file, or had a PO printed. Select the desired order and then click **Edit**. Edit items as desired and complete the order using the steps under Creating an Automatic Order or Creating a Manual Order.

Deleting an Order

To delete an order, select the desired order and then click **Delete**. You will be prompted for confirmation before the delete occurs. **IMPORTANT!** This action does not cancel any orders with the supplier. If the order has already been



submitted to A.C.E. or another supplier, you must contact them to complete the cancel/delete process.

Receive Order

The Receive Order menu item allows you to receive an order into School Management inventory. Select an order from the Receive Order dropdown list. Items from the order are displayed. To mark all items from the order as Received, click **Receive All Items** on the menu bar. To only receive some of the order items, modify the Qty Received column for each individual item.

Browse Inventory

The Browse Inventory menu item allows you to see current inventory items that have been either ordered or are in stock. Note that items already issued to students are not displayed, since they are not technically in stock.

Adding Inventory

To manually add an item to inventory, click **Add**. This will open the Add Inventory Manually form.

	Add Inventory Manually				
Items ordered through School Management will automatically be added to inventory when the order is submitted or the PO is printed.					
Item	V () (+				
Item Number					
Quantity	1 😜				
Assigned Student					
	Save Done				

To add the new item from this form:

- Click **search** and select the item you wish to add. If the item you are adding to inventory is a new catalog item,
 - click 🔜 and enter the details for the item.
- Enter the quantity being added to inventory.



- Select the student this item is being assigned to (optional).
- Click **Save**. The form remains open, allowing you to enter more items to inventory if desired.
- Click **Done** when you are finished adding inventory.

Issuing Inventory

To issue an inventory item to a student from the Inventory list, select any inventory item that has been previously assigned to that student. Inventory items that do not contain a student name in the Assigned Student column cannot be issued until they have been assigned. (PACEs must be prescribed in Progress Control before they can be assigned to students.) After selecting the item, click **Issue**. The item is issued to the student and removed from inventory.

Assigning and Reassigning Inventory

To assign an inventory item to a student, select any item that has not been previously assigned to a student and click **Assign**.

To reassign an inventory item to a different student, select any item that has been assigned to a student and click **Reassign**. The Select Person form will be displayed, allowing you to choose the student you wish to reassign the item to.

Unassigning Inventory

To unassign an inventory item, select any inventory item that has been assigned to a student and click **Unassign**.

Changing Inventory Status

To manually change the status of an inventory item, select the inventory item and click **Change Status**.

Suppliers

NOTE: A.C.E. is the default supplier in School Management and cannot be deleted from the system.

The Suppliers menu item allows you to manage curriculum suppliers. The following actions are available:

- New Adds a new supplier to the system. This action displays the Add New Supplier form. Enter the appropriate values on this form and click Save.
- Edit Allows you to edit supplier information. Click the supplier you wish to edit and click **Edit**.



• Delete – Allows you to delete a supplier. Click the supplier you wish to delete and click **Delete**.

Catalog

Select **Catalog** to view and manage catalog items in School Management. To search for an item in the catalog, type a value in any text box at the top of the grid. This action filters the catalog list to items that match any part of the text entered. You can enter values in multiple text boxes to filter the result set as much as desired. The following actions are also available:

- Manual Update This option is used to manually update the catalog when School Management is never connected to the web. To perform a manual update, log in to the Portal at <u>www.studentmanage.com</u> and download a catalog file from the Update tab. The Manual Update button allows you to select the downloaded file to update the School Management catalog.
- New Adds a new item to the catalog. This action displays the Catalog Item form. Enter the appropriate values for the new catalog item and click **Save** to add the item.
- Edit Allows you to edit a catalog item. Only catalog items that have been manually added can be edited.
- Delete Allows you to delete a catalog item. Only catalog items that have been manually added can be deleted.

In the Auto-Stock column, you can enter the quantity that you would like to keep in stock for that item. When you create an automatic order, you can choose the option to **Replenish PACE Inventory**. This option will add to the order any items needed to maintain the **Auto-Stock** quantity.

Subject Ordering Rules

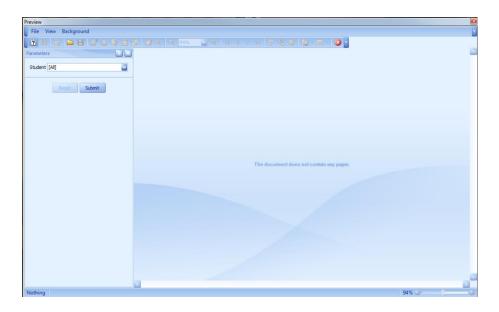
The Subject Ordering Rules section allows you to manage ordering rules for the subjects found in School Management. **IMPORTANT – You should not make changes on this page unless absolutely necessary.** By default, all subjects are set to (auto). To modify the Preferred Edition, select a new value from the dropdown list and click **Save**.



CHAPTER 11

Reports Section

The Reports menu displays a listing of all the reports in the system, sorted by category. To run a report, click the report row. This action causes the report to load and the report Preview form to be displayed. For most reports, a Parameter panel is displayed, allowing you to select the desired parameters for the report. Make your selection and click **Submit** to run the report.



For reports that do not require any parameters, the report is displayed without the need to click **Submit**.

After running a report, various options are available from the menu bar, including Search, Save, Print, and Zoom.

When you are finished with a report, close the Preview form by clicking the red X in the menu bar, clicking the X in the upper right of the form, or choosing File \rightarrow Exit.



CHAPTER 12

iPad Application

The School Management iPad application can be used to assist with goal check, homework, and attendance. In addition, the iPad can be used to take student photos. In order to use the iPad application, a wireless network is required in your school or Learning Center. **NOTE:** The current iPad application is supported on iPads running iOS 13 or higher.

Within the iPad application, floating panels can be expanded by swiping to the left and can be collapsed by swiping to the right.

Logging In and Out

After starting the iPad application, you will be presented with the Login option. The Connection dropdown list will contain the School Management server name. If the server name is not displayed in this dropdown list, you will not be able to connect to School Management and should troubleshoot your wireless network.

Enter your Username and Password, then tap **Login**. If the login is successful, you will see the message "Connected successfully!"

To logout at any time, tap the Home menu and **Logout**.

Student Goals and Homework

To manage Student Goals and Homework, tap the Students menu. A list of students is displayed. Selecting any student name allows you to manage homework, goals, and notes for the student. This screen defaults to the current date. Navigate to a different date by using the arrows on either side of the displayed date.

Homework Slips

Existing homework slips for the displayed date are shown under the Homework Slips heading. To view or edit an existing homework slip, tap the item. To add a new homework slip, tap



Add Homework Slip. When adding or editing a homework slip, the following fields are available:

- Subject A drop- down menu for selecting a subject.
- From Page The beginning page for the homework assignment.
- To Page The ending page for the homework assignment.
- Task Include additional information if desired.
- Due The due date for the homework assignment.
- Status button Choose Incomplete, Not Signed, or Signed as appropriate.

Additional details can be added in the note area below the Status buttons.

Select Save when you have entered the information as desired.

Attendance

To manage attendance, select the Attendance menu. A list of students is displayed, along with their attendance status for the selected date. To change the attendance for any student, select the student name and select the desired status from the list presented. Changed items are automatically saved to School Management.

Review Items

Review items are items that require special attention, such as overdue items or items that require a Supervisor's approval. Tap the Review menu to see outstanding review items. Select any item to see more detail or to modify the item.



Details

The Details section allows you to view student notes and homework items in list form.

Notes

To view existing student notes, tap the Notes menu, then select the desired student. Notes for the selected student are displayed. Tap a note to modify it, or select the + sign to add a new note.

Homework

To view existing student homework, tap the Homework menu, then select the desired student. Homework items for the selected student are displayed. Tap a homework item to modify it, or click the + sign to add a new homework item.

Photos

To view existing student photos, select the Photos menu. Thumbnail photos for each student are displayed beside the student's name. Select the student name to view a larger version of the student's photo. To take a new photo for a student, use the following steps:

- Select a student.
- Tap Take Photo to take a new image.
- Use a two-finger pinch gesture to scale the image as desired. Drag the image to move it as desired.
- To retake the image, tap **Retake**.
- To accept and use the image, tap Use.





Release History

Version 1.9

Released Version: 1.9.7573

Date: 9/2020

Updated iPad application (v. 1.22) to run iOS 13 or higher.

Addressed formatting and reporting issues for Academic Records Reports

Added Quick Score Entry for PACE/Unit Scores to the Students section

Added Issued (I) and Ordered (O) dates for incomplete PACEs to Supervisor's Progress Report

Version 1.8

Released Version: 1.8

Date: 11/15/2016

Made program modifications to support ordering through School Management after Distribution Center software update

Maintenance updates released addressing bugs reported by users up through 7/2018

Version 1.7

Released Version: 1.7

Date: 9/29/2016

Added a check on Family Save to make sure a valid Mailing Address has been entered

Fixed Congratulation Slips fail in Spanish (Mexico) Region settings



Fixed Supervisor's Progress Report not printing correct Supervisor

Added new layout for High School Transcript report

Allowed Permanent Record to be printed when standardized test scores are missing

Fixed foreign Key errors on Academic Projections

Fixed non-PACE items not displaying on transcript

Changed popup when running reports to only present if the Academic Year is being changed to a new one in which no students have been enrolled yet

Version 1.6

Released Version: 1.6

Date: 3/2016

Removed compatibility with Windows XP

Added compatibility with Windows 8

Added compatibility with Windows 10

Various bug fixes

Version 1.5

Released Version: 1.5

Date: 7/2015

Added ordering features to select individual students

Added ordering features to replenish inventory

Added reenroll feature when switching to new school year

Added Batch Transactions to Billing

Added a Merits Report



Added backup location selection

Added the Overall High School Average

Added feature to remove or replace inactive items on orders

Various bug fixes

Version 1.4

Released Version: 1.4.5538

Date: 5/29/2015

Fixed display issue on Academic Projection Report and Goal Check Report

Fixed permissions to allow photos to be taken with iPad and browsing finances

Fixed GPA calculation to use the student's final academic year

Fixed bug if Administrators Role is renamed

Fixed error with 0 credit subjects

Fixed errors billing for PACEs

Fixed error changing the quarter dates for the current school year

Version 1.3

Released Version: 1.3

Date: 1/20/2015

Added a default permission for admin and supervisors named Override Inventory to override inventory requirements when assigning PACEs

Allowed a user to issue an inventory item, override the requirement to have that PACE in inventory, and not subtract the PACE from inventory when issued



Bug fixes on Inventory and Student Progress Report

Version 1.2

Released Version: 1.2.5373

Date: 9/17/2014

Bug fixes to the following items:

- California grading scale
- Printing Congratulations slips
- PACE order labels
- Billing statement
- Subject ordering prerequisites

Version 1.1

Released Version: 1.1.5330

Date: 8/5/2014

Academic Projection Toward Graduation added as a new report

A quarterly average added for each subject on the Student Progress Report in addition to the yearly average

Various Bug Fixes

Released Version: 1.1.5339

Date: 8/14/2014

Bug fixes on Goal Check

Version 1.0

Released Version: 1.0.5305

Date: 7/11/2014

First release of aceconnect School Management