

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.

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

2



Table of Contents

INTRODUCTION	
Welcome	6
Common Features and Elements	
INSTALLATION SECTION	
Hardware Requirements	
Software Requirements	
Installation Prerequisites	9
Installation Steps	
Server Installation	
Client Installation	
Server and Client Installation on a Single Computer	
LOGIN/GETTING STARTED SECTION	
Login	
Getting Started	
Download the License	
Update the Catalog	
SETUP SECTION	
School Configuration	
Academic	
Billing	
Contact	
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	41
Dashboard	41
Resources	41
Find People	
Backup/Restore	
Shutdown	
License	
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	
Student 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	73
Balances	73
Transactions	73
Adding a Manual Transaction	73
Viewing Transactions	74
Reversing a Transaction	74
Deleting a Transaction	74
Billing Runs	74
Billing Plans	75
Miscellaneous Fees	77
Batch Transactions	
Inventory Section	
Orders	
Filtering Orders	
Creating an Automatic Order	
Creating a Manual Order	
Submitting an Order	
Uploading a Manual Order File	
Editing an Order	
Deleting an Order	
Receive Order	
Browse Inventory	
Adding Inventory	
Issuing PACE Inventory	
Assigning Inventory	
Unassigning and Reassigning Inventory	
Changing Inventory Status	
Suppliers	
Catalog	
Subject Ordering Rules	
REPORTS SECTION	
IPAD APPLICATION	
Logging In and Out	
Student Goals and Homework	
Homework Slips	
Attendance	
Review Items	
Details	
Notes	
Homework	
Photos	91
Release History	



Chapter 1

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 A.C.E. Technical Support at **615-612-5288** or email <u>technicalsupport@aceschooloftomorrow.com</u>.

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.

The main School Management window is laid out in three columns with the left column for navigation, the large center section for working with the selected data, and a right column with helpful shortcuts to this *User Guide* or reports associated with the current section in view.

Menu Bar

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

- Clickable Action Buttons New, Edit, Delete, Print, etc.
- Dropdown Selection Allows selection from a list (typing can narrow the selections) or, in the case of date entries selection, a calendar
- Filter Button Sets a filter for a data grid display
- Refresh Button Reloads the display with current data from the SMS Server database





Data Grid

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

Altering data grid display:

Sorting

Any data grid can be sorted alphanumerically by clicking on the name of any column (or reversed by clicking again).

• Filtering

Many data grid screens will have a Filter button in the menu bar with common options for that screen.

Any data grid can be filtered by column values by clicking on the small Filter button that appears in the upper right corner of the column header when your pointer is over it. Options appropriate for the column's data will show (such as > or = for numbers or a clickable calendar for dates).

When a display is limited by a filter, a notation at the bottom of the window will note the filter in use. Example: The Browse Students screen in the Students section defaults to show only students enrolled in the selected year. The blue bar at the bottom shows that only the students whose status is Enrolled are displayed, just as the filter option is set.

tudents	PNew / Eds 🙀 Dele	te Acad Year 2017-2018	2 N	1 2		Go to Area	-
Progress Control	Name	Level		Just My Students	NC Year	Ments an	d De
Quick Score Entry	🕴 🗑 Supervisor: Erlendaan, M	h, Paul II.		Show All Students		Run Report	
Academic Projection	Willing, Hudson	1st Level		Show Enrolled Students	018	Second and a second sec	
Kindergarten	Wiling, Judeon	3at Level	100	Show Withdrawn Students	1019	Help	
ABCs	MdMercy, Beday	4th Level			810	About	
Attendance	MdMercy, Sandy	මදිා Level	1	Clear Groups	018	User Guid	e (
	Lovejoy, Christi	Sophamore		Group by Level	019		
Goal Check	Upright, Reginald	Sophomore	1 -	Group by Supervisor	018		
Hotsework Assignment	Wrbueson, Ace	Junior	- 24	Group by Status	810		
Merits and Demerits	McMercy, Sil	Senior	6793	201	17/2018		
Standardized Testing							
Rendardand Testing Weige Status Weige Status Weige Status Weige Status							
Rendardsveil Testing hvidege Status menet slies dents							
Descable Trats Standardured Testing Investige Status Investige Status Investige Status Investige Internet Investige Internet Investige Internet Investige							



Chapter 2

Installation Section

School Management consists of two main components or "packages" – the "SMS Server" component (Microsoft SQL Server database storage with a Windows® service) and the "SMS Client" component (user interface). These components can be installed in a network configuration (a server computer and one or more client computers) **or** in a single computer configuration (both the server and the client components on a single computer).

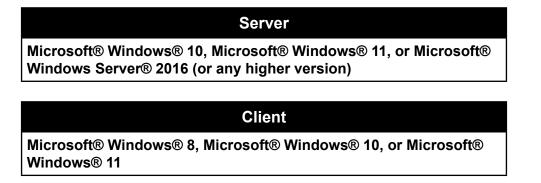
Hardware Requirements

	Client (minimum)	Server (minimum)	Server (recommended)
Processor	800 MHz or faster	1GHz or faster	2GHz or faster multi-core processor
Memory	512MB	4GB	6GB+
Hard Drive	Any	100GB	250GB+

Software Requirements

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 applicable.

School Management is Windows software and can be installed only on supported Windows environments.





Installation Prerequisites

If you have Internet access and Windows updates are current, the prerequisites will be installed when running the School Management installation on that PC.

If the PC onto which you are installing School Management does not have Internet access, you will need to download the installer files using a device with Internet access and copy them to that computer (using a USB drive with approximately 1GB of free space).

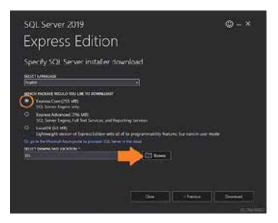
To get the installer for Microsoft SQL Server 2019 Express

(only needed for the SMS Server installation without Internet)

- Use the link below to get the SQL Server 2019 Express installer (SQLServer2019-SSEI-Expr) on the device with Internet access to download the installation media: <u>https://www.microsoft.com/en-us/download/details.aspx?id=101064</u>
- When you open and approve this to run, select **Download Media**.



• On the next screen, with the **Express Core** option selected, click the **Browse** option to select the USB drive as the location to download the SQLEXPR_x64_ENU.exe installer file.



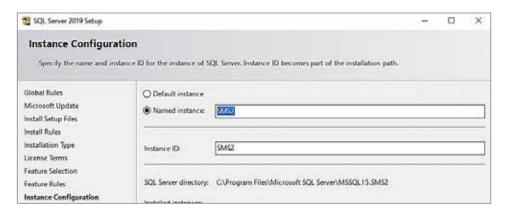


Installation Steps

For PCs with Internet access, the School Management installer will download and configure both the Microsoft SQL Server prerequisite and the School Management software.

For those without Internet access, first use the SQLEXPR_x64_ENU.exe installer file downloaded with the instructions above before using the School Management installer on your main PC.

During the installation of the "New stand-alone installation" of 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 SMS2.



To get the installer for School Management

For new School Management licenses:

- Click the **Registration Link** provided in the registration email and set up your Portal User Name and Portal Password.
- After Portal User Name and Portal Password for your school have been registered, click the **Download Installer** link.

For existing School Management licenses:

- Access the School Management Portal website at <u>studentmanage.com</u>.
- Log on with the Portal User Name and Portal Password for your school.
- Click the gold button for LICENSES.
- Use the link to "Download Installer" for the Latest Version installer.
- If downloading for a new installation on a PC without Internet access, see Chapter 3 "Activating the License without Internet Access" and "Updating the Catalog without Internet Access" for the files needed before leaving the Portal website.



When you open the schoolmanagement.exe installer, tell Windows to allow the installer (irsetup.exe) to make changes and begin the installation.

Server Installation

To perform the server installation, choose both **SMS Client** and **SMS Server** from Select Packages during installation. The server component (including database and Windows service) will be installed and started. Icons for the user interface and this guide will be added to the Start menu.

NOTE: The SMS Server operates as a Windows service unseen in the background, allowing connections to the database. The SMS Client is needed to adjust settings (even if not used regularly on the PC). The SMS Client should be included on all installations, but it does not need to be open on the Server to allow an SMS Client from any computer on the school's local, private network to access the database.

Client Installation

To perform the client installation, download the School Management installer onto each designated computer. From Select Packages during installation, choose **SMS Client** and continue. Icons for the client tool and this guide 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. From Select Packages during installation, choose **SMS Client** and **SMS Server**. Icons for the client tool and this guide will be added to the Start menu.



Chapter 3

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. If not found on the same PC, the school's local, private Windows network will be scanned for the PC with the SMS Server database. The name of the computer where the database is found displays as the Server. Enter the default user name **admin** and the default password **admin**.

NOTE: It is highly recommended that you change the default password for the admin user in Setup using the Staff and Users screen.

🧧 School Ma	anagement - Login	×
<u>Server</u>	Computer Name	
User Name		
Password		
		Login
School Ma	anagement - Login	×
	anagement - Login Computer Name	×
		×
<u>Server</u>	Computer Name	

Once initialization is complete, the main School Management window is displayed on the Dashboard screen.



Getting Started

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

At installation, the program will open in Demo Mode with the school name as Demo School and will only allow working with one student. When the license is downloaded and activated, the software will show the school name as registered and permit access to all features of the program. 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 school's **Portal User Name**.
 - 3. Click Change... to enter your school's Portal Password.
 - 4. The word "Success" should appear in the Portal Account Status box.
 - 5. Click Download License.
 - 6. Log out of School Management and log back in. The school name as registered will now appear in the program, which has opened to full access.

(To change the school name as it appears in the software, contact A.C.E. Technical Support by phone at **615-612-5288** or by email at <u>technicalsupport@aceschooloftomorrow.com</u>.)

Highlar	nd School				Ukers admin
Jinese	2				tiela 🛁
Dailboard Resources	Portal Uber Name	techsuppert	Portal Account Status	Success	About. Univ Outle
Find People	Portal Password	Ownet			
BadoupRestore	License Mode	School Management School Ed	ilion	CONTRACT.	
Shutdoon	Customer Name	Highland School	Insued On	11/29/2021	
(Dame	Customer Number	7777			
there.					
Families		222/0/10/00		2000/2002/200	
Stateda		file. You may need to re effect.	ree' betton to automatically downloa clart School Management for license	d any installable license changes to take	
biling		CORE			1
Invectory		6	Envirios: Licinse		
Reports					



Activating the License without Internet Access

- 1. On a computer with Internet access, log in to the Portal at studentmanage.com.
- 2. Click the **Licenses** tab.
- 3. In the License column, click the Download 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: C:\Program Files (x86)\School Management System\
- 6. Restart the computer.
- 7. At next login to School Management, the school name as registered will appear in the program, which opens to full access.

Software Updates

With Internet access, when a newer (higher numbered) version of the software is released, an **Update Available** notification will display in the top right of the School Management window where the version number usually displays. For schools without Internet access on the server computer, please log in periodically at <u>studentmanage.com</u> and check the **Licenses** section to see if the **Latest Version** is a higher number than what is currently in use at your school. Software updates are made by downloading the installer for the higher version number and running it over the older installed version.



Update the Catalog

When School Management is first installed, it will include a basic (but outdated) 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. With the Portal Account Status reading "Success," click **Update Now** in the Catalog and Orders section.
- 3. The Catalog Last Updated at field will display the date and time of the update.

School Hanager	ent.		103
Highlar	nd School		usen 2.6.8238 Lozaut User: admin
Home	2		Help L
Dashboard Resources Find People	Portal Username Stehaugoort Portal Account Status Success		About User Quide
Badup/Restore	Catalog and Orders	-	
Stutdown Lionne Datid Settings	Employ Cutates and Revenue Orders Catalog Updates and Revenue Orders Update Daily at (0x00 AM (0x00 A	9	
lar	Update log Seved at 11:41/07 AM		
Fanles Stucents	[Catalog1ync] Updated Catalog1ten Speaking Drgiah Activity Pac 3 3 [Catalog1ync] Updated Catalog1ten Speaking Inglah Activity Pac 4 4 [Catalog1ync] Ubdated Catalog1ten Speaking Endith Activity Pac 5 5		
Dilleg	[CatalogPyre] Updated CatalogTem Speaking English Activity Pac 6 6 [CatalogTyre] Updated CatalogTem Spanian Grammar 3017 3017		
Inventory.	(Catalogiym) Updateli Catalogitem Spanish Science 1044 1044 (Catalogiym) Updateli Catalogitem Spanish Science 1055 1055		
Reports	[Catalogivinc] Updated Catalogiten Spanis Science 1036 1056 (Catalogivinc) Updated Catalogiten Spanis Science 1057 1057	1720	
Setup	[Catalog3ym] Updated Catalog3tem English 1040 1040		_

Updating the Catalog without Internet Access

- 1. On a computer with Internet access, log in to the Portal at studentmanage.com.
- 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 in to 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.

Highland	School					Uter: adm
Setup	Academic				3	Help
Academic Year Roles and Permissions	Auto Issue PACE High School Avg High School Avg Use GPA Weight Hraman Score	Both S0%	O PACE	0 n	DR-PACE	About User Guide
Room	Billeg	and a second			3	
Staff and Users Subject Types Subjects	BEPACEs PACE Fee: (Per PACE) Plus Repeat PACE Fee Plus Percentage of PACE Cost	© Never \$0.00 \$0.00 100.00%	When issued	When assigned	When completed	
Grade Conversions	Contact				0	
Courses of Study Grade Types Standardized Testing Destroble Traits Relationship Types Hole: Types	Fax Maling Address Haling Address 2 Haling City Maling Country Maling 201Postal Code Maling State/Province Phone Phone Physical Address Physical Address 2 Physical Address 2 Physical City Physical Country Physical Country Physical Code Physical State/Physice	US				
inte	Inventory				8	
Rudents	Allow Online Ordering Order PACEs Ahead	3			-	
Wing .	Use Free Floating Mode					
nventory separts	School Administrator Name Logo	No image data			3	

School Configuration

The School Configuration page contains basic school information. As the top page in the section, the School Configuration page will appear first when you select the Setup section with the buttons in the lower left.

Academic

- Auto Issue PACE Automatically issues the next PACE in that subject (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 weight settings for each subject (off by default)
- Minimum Score The default minimum passing score for any PACE or academic item as established when setting up subjects



Billing

 Bill PACEs – Determines if or when PACE charges are applied to the family for those used by each student

When Bill PACEs is set to something other than Never, use the settings below for how the PACE fee is calculated.

- 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 Option to use actual cost of the PACE item (Inventory > Catalog) as a percentage when calculating the charge for each PACE used

To show how these settings work as a Bill Run posts PACE Fee charges for a student to his family, take, for example, a PACE that costs the school **\$2.48** per copy. This is how the charge would be calculated:

- If 150% is entered in the Plus Percentage of PACE Cost field and the PACE Fee (Per PACE) is set at \$0.00, the amount to be billed is calculated as:
 \$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%, the amount to be billed is calculated as:
 \$3.00 + (\$2.48 x 50%) = \$3.00 + \$1.24 = \$4.24.
- If the student must repeat this PACE and Plus Repeat PACE fee is set at \$2.00 with the PACE Fee (Per PACE) set at \$3.00 and the Plus Percentage of PACE Cost is set at 50%, the program will calculate the charge for the repeated PACE as:
 \$3.00 + \$2.00 + (\$2.48 x 50%) = \$3.00 + \$2.00 + \$1.24 = \$6.24.



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

(Box at bottom for "Physical Address and Mailing Address are the Same" can be selected so data does not need to be retyped.)

- Physical Address
- Physical Address 2
- Physical City
- Physical Country
- Physical ZIP/Postal Code
- Physical State/Province

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 PACE items relate to students
 - When using Free Floating Mode (checked), 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 not using Free Floating Mode (unchecked), PACE inventory is tracked by specific Assigned Student. PACEs ordered by the Automatic Order are in Inventory as Ordered and Assigned to the student that caused the item to be ordered. PACEs added to inventory manually without an Assigned Student will never show as In Stock for a student to be used and will remain in inventory unused with Automatic Order continuing to order new assigned PACEs for the students.

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.



School

- Administrator Name
- Logo

To add Logo image, click in the area to the right of the label that defaults to the text "No image data," then right-click in the same area to access the image options menu to Paste if copied or Load to select an image file. Your logo will display in the upper left next to the school name in the software and on any printable report. 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).

Academic Year

The Academic Year page contains date settings for all years with data in the program. Open the **Setup** section from the buttons in the lower left and click **Academic Year** in the links above.

To create and configure an academic year, click **New**. Type a Name for the year (e.g., "2022-2023"), enter the Begin Date and End Date values, and click **Save** at the top.

etup	Save Save	🗱 Delete: 🎯 Set as C	unent 😴					Help
School Configuration	New	Segni	Date	End Date		Current Year		About
Address Year	• 2012/0021	1121	Sec.	\$12276924		0		User Guide
Roles and Pennessions	2021-2022	8/22/2	021	\$/28/2022		1.1.1		
Rooms	2020-2021	8/16/2	820	5/29/2021				1
Staff and Users	2019-2020	8/38/7	1019	5/30/2020			101	
Subject Types								
1915-54	Details			12				
Subjects	Period Type 🔘	Quarter Name	Quarter 1					
Grade Conversions	0	Trimester Start.Date	8/15/2022 📓 End	Date 10/15/2022				
Courses of Study	0	Senester	0		-	B Luder		
Grade Types								
Standardized Testing	School Days							
Desirable Trats	Concernent Lawrence						٦ I	
		< August < 2023	september	2022 04	tober > 202	2 >		
Itelatorship Types		< August < 202 Su Mo Tu We Th Fr 1			tober > 202 Tu We Th Fr			
Relationship Types		Su Mo Tu We Th Fr 5 31 1 2 3 4 5	Se Su Mo Tu We	th Pr Sa Su Ma	Tu We Th Fr			
Relationship Types		Su Mo Tu We Th Fr 3	Se Su Mo Tu We	Th Pr Sa Su Ma 1 2 3 8 9 10 2 3 15 16 17 9 10		Sa I 8		
Relationship Types		Su Mo Tu We Th Fr 1 31 1 2 3 4 5 7 6 5 10 11 12 14 15 18 17 18 15 21 22 23 24 25 26	Se Su Mo Tu We 6 13 4 5 6 7 10 11 12 13 14 17 18 19 26 21	In Fr Sa Su Mail 1 2 3 3 3 3 3 8 9 10 2 3	Tu We Th Fr 4 5 6 7 11 12 13 14 18 19 26 21	Sa 1 8 15 22		
Itelatorship Types		Su Mo Tu We Th Fr 1 31 1 2 3 4 5 7 8 9 18 11 12 14 15 18 17 18 19	Se Su Mo Tu We	In Pr Sa Su Ma 1 2 3 3 10 2 3 15 16 17 4 10 2 3 15 16 17 4 10 2 2 15 16 17 4 10	Tu We Th Fr 4 5 6 7 11 12 13 14 18 19 26 21 25 26 27 28	Sa 1 8 15 22		
Kelatorehip Types Note Types		Su Mo Tu We Th Fr 1 31 1 2 3 4 5 7 6 5 10 11 12 14 15 18 17 18 15 21 22 23 24 25 26	Se Su Mo Tu We 6 13 4 5 6 7 10 11 12 13 14 17 18 19 26 21	In Fr Sa Su Mail 1 2 3 3 3 3 3 8 9 10 2 3	Tu We Th Fr 4 5 6 7 11 12 13 14 18 19 26 21 25 26 27 28	Sa 1 8 15 22		
Helatoonahip Types Note Types ne		Su Mo Tu We Th Fr 1 31 1 2 3 4 5 7 8 9 10 11 12 14 15 18 17 18 15 12 22 23 44 25 28 26 29 30 31	Su Mo Tu We 6 4 5 6 7 10 11 12 13 44 127 18 194 21 24 23 26 27 28 29	th Pr Sa Su Ma 1 2 3 8 9 10 2 3 15 16 17 4 10 12 23 24 15 23 24 15 30 33 30 33	Tu We Th Fr 4 5 6 7 11 12 13 14 18 19 28 21 25 26 27 28	Sa 1 8 15 22 29		
Helatorship Types Note Types Ne		Su Mo Tu We Th Fr 1 31 1 2 3 4 5 7 6 9 10 11 12 14 55 18 77 18 15 21 22 23 34 25 28 20 29 30 31 Fevender 2022	Ba Su Mo Tu We 6 13 4 5 6 7 14 5 6 7 15 19 28 21 25 26 27 28 1 Occariber	Ih Pr Sa Sa Ma 1 2 3 3 3 3 3 3 33	Tu We Th Fr 4 5 6 7 11 12 13 14 14 19 28 21 25 25 27 28 nuary 202	5a 1 8 15 22 29 3		
Helatorship Types Note Types Ne		Su Mo Tu We Th Fr 5 31 1 2 3 4 5 7 6 9 10 11 12 21 22 3 4 15 14 15 18 27 18 19 21 22 23 24 35 26 20 29 30 31 November 2022 Su Mo Tu We Th Fr 1	So Su Mo Tu We 6 13 4 5 6 7 13 14 5 13 14 14 5 23 24 23 24 17 15 23 24 21 24 23 24 23 24 21 25 26 27 28 2 26 27 28 27 28 24 24 24 24 24 24 24 25 26 27 28 24	Ih Pr So Su Model 1 2 3 3 3 3 8 9 1.0 2 3 3 3 12 23 24 15 17 13 32 23 3	Tu We Th Fr 4 5 6 7 11 12 13 14 18 19 28 21 25 25 27 28 Nuary 202 1 10 We Th Fr	5a 1 8 15 22 29 3 5 58		
Helatorahip Types Nete Types ne nikas sdenta		Su Mo Tu We Th Fr 5 31 1 2 3 4 5 7 6 9 10 11 12 21 22 3 4 5 21 1 2 3 14 5 21 22 23 94 05 26 22 23 94 05 26 20 20 031 November 2022 Su Mo Tu We Th Fr 1 1 2 3 4	Ba Su Mo Tu We F 6 3 4 5 6 7 11 12 13 14 15 14 12 13 14 15 14 12 13 24 24 24 24 25 12 38 37 38 38 37 38 14 December December 14	Ih Pr Sa Su Mail 1 2 3 2 2 8 9 10 2 2 12 25 21 10 12 12 25 21 12 12 18 30 33 33 2022 34 1 2 34 1 37 3 1 2	Tu We Th Fr 4 5 6 7 11 12 13 14 18 19 28 21 25 25 27 28 Nuary 202 1 10 We Th Fr	5a 1 8 15 22 29 5 5 5 5 5 7		
Descrable Traits Helatocratip Types Note Types enter odents udents Not		Su Mo Tu We Th Fr 5 31 1 2 3 4 5 7 6 9 10 11 12 21 22 3 4 15 14 15 18 27 18 19 21 22 23 24 35 26 20 29 30 31 November 2022 Su Mo Tu We Th Fr 1	Ba Su Mo Tu We 6 13 4 5 6 7 11 12 13 14 12 14 12 13 14 21 23 24 27 12 23 28 27 28 28 27 28 1 Decomber 5 5 04 70 14 12 14 1	Ih Fr Sa Su Mail 1 2 3 2 3 8 9 10 12 2 3 122 23 24 14 23 24 20 20 23 24 33 33 20222 34 34 34 34 1 12 3 1 2 4 9 10 1 2 1 12 3 1 2 1 12 3 1 2 15 16 10 1 2	Tu We Th Fr 4 5 6 7 11 12 33 14 18 13 35 25 25 25 27 28 nuary 202 10 We Th Fr 3 4 5 4	5a 1 8 15 222 23 5 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9		

After saving, use the Details area to configure the grading periods for the academic year.

• Period Type – This is based on the number of grading periods during the year. Options are Quarter (4), Trimester (3), and Semester (2). After choosing the Period Type, each period



defaults with a Name and approximates for Start Date and End Date. Edit the details of the first period and click **Update**. Then use the slider to advance to the next period to edit and update its details. Continue this process until all periods are configured.

• School Days – Valid school days are highlighted by period on the School Days calendar. Click any day in the calendar to toggle (highlight) 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 student record reports. It is important that any days school is not in session (such as days off surrounding Christmas) be toggled off and all days in session be toggled on for accurate attendance reporting.

· 2	iep	tenè	er	<	200	11		Oct	ober	6		207	11	3	Nov	emb	er		203	21		Dec	embe	er i		203	21		Jan	uan	1.3		200	22)
u.	M	Tu	We	Th	Fr	Sa.	Su	Mo	Tu	We	Th:	Fr	Sa	Su	Mo	Tu	We	Th:	Fr	Sa	Su	Mo	Tu	We	Th	Ft	Sa	Su	Mo	Tu	We	Th	Pr.	Sa
9	30	31	1	2	3	41						1	2		1	2	3	4	5	6				1	2	3	4							1
í.		7			10	11	3	4	5		7	τ.		7	18	. 9	10	11	12	13	5	6	7		4		11	2	3	4	5		7	1
ź	13	14	15	16	17	10	10	11	12	13	14	15	16	14	15	16	17	18	19	20	12	13	14	15	16	17	18	.9	10	11	12	13	14	15
9	20	21	22	23	24	25	17	18	15	20	21	22	23	21	22	23	24	25	25	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22
8	27	28	29	30			24	25	25	27	28	29	30	28	29	1 28					26	27	28	29	30	31		23	24	25	26	27	28	29
							31																					30	31					
	Fel	muar	¥.		200	22		Me	rch			202	2		1	loril			203	22		M	lay			203	22		х	ne			200	22
	Fel Mo		y We	Th	200 Fr		SU	Ma Mo		We	Th		2 5a	50		loril Tu	We	Th	203 Fr		Su	N Mo	983	We	Th	203 Fr		Su			We	Th	200 Fr	
			1000	Th 3		5a	SU			We 2	Th 3			50			We	Th		Sa			983	We	1.1			50			We	Th 2		
U			We	_			SJ +			We 2	Th 3	Fr 4	Sa	50			We	Th			SU		933	We 4	Th 5	Fr	58 7	50			We 1		Fr 3	5a
U		Tu 1	We	3	Fr 4	5a 5				We 2 9	Th 3 10	Fr 4	5a 5	50 3 10	Mo	Ty	1	Th 7	Fr 1	5a 2	1		TU 3 10	4	5	Fr 6	58 7 14	SU 3			We 1 8 15	2	Fr 3	58
	Mo	Tu 1 15	We 2 4 16	3 10	Fr 4	5a 5 12 19		Mo 7 14		We 2 4 16 23	3 10 17	Fr 4	5a 5 12 19	3	Mo	Tu 5	6 13	7 14	Fr 1 8	5a 2 8 16	1	Mo 2 9 16	TU 3 10	4 11 10	5 12 19	Fr 6	58 7 14 21	5u 5 12 19			We 1 8 15 22	2	Fr 3 10	5a 4 11
13 13	Mo 7 14	Tu 1 15 22	We 2 4 16	3 10 17	Fr 4 11 18	5a 5 12 19	* 13 20	Mo 7 14 21	TU 1 # 15 22	2 9 16	3 10 17 24	Fr 4 11 10	5a 5 12 19	3 10	Mo	5 12	6 13	7 14 21	Fr 1 8 15 22	5a 2 8 16 23	1 8 15 22	Mo 2 9 16	TU 3 10 17 24	4 11 10	5 12 19	Fr 6 13 20	58 7 14 21	5	Mo 6 13 20	Tu 7 14	1 15 22	2 9 16	Fr 3 10 17	5a 4 11 10

Suggestion: When editing the School Days calendar, maximize the School Management window to use the full screen and see more months (perhaps full year as above) on the calendar.

• 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 another year was current and a newly created year with no information is selected when **Set as Current** is clicked, a prompt will allow you to choose which students from the previously current



year to reenroll. For each returning student, complete the line by checking the Reenroll column and selecting the Level and Supervisor for the year beginning; then click **Save**. (Students can be enrolled individually later.)

			ts		
-	🚽 Save 🛛 🗱 Cancel	2			
	Student	Previous Level	Reenrol	Level	Supervisor
	Lovejoy, Christi	Freshman	2	Sophomore	Friendson, Paul B.
	MdMercy, Becky	3rd Level	2	4th Level	
đ	Meekway, Purlge	Sth Level			
	Upright, Reginald	Freshman		Name	
	Wrbueson, Ace	Sophonore		3rd Level	1 A A
				4th Level Sth Level	
				GET LEVE	
				7th Level	
				8th Level Freshman	128
				8	

After saving the students for reenrollment, an option will be given to "Move Incomplete Subject Items to the New Academic Year." Selecting this as recommended (though a "Do Not Move Any Items" option is also given) will move all prescribed PACEs/Units without scores from the students' Progress Control screens for the year that had been current to the Progress Control screens of the new year so they can be completed.

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** and enter the Name. To allow PACEs, resource books, etc. to be assigned to that room, set the Can Have Inventory and Is Learning Center values. Navigating to another row automatically saves the new room.

a Highland	School			Version: 2.0.8238 Logout
Setup	🛃 Save 🤤 New 🎇 Delete 📑			Help
School Configuration Academic Year Roles and Permasona	Native	Can Have Inventory?	Is Learning Center?	About
	ABC Learning Center	2	2	User Guide
	Main Learning Center	2	2	
Toom				
Staff and Users				

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 accessing the program, one account may be sufficient. However, a second user in the role of Administrator is



recommended. If one has login trouble, the other can log in to help make corrections. Additional users would be set up on this screen:

Highland Highland	School				User: admin
Setup	🔄 🔆 New 🖉 Edit 🗱 Dele	x 2			Help L
School Configuration	Name	Room	Locked Out	Last Login Time	About
Academic Year	• admin	Provide State		190802	User Guide
Roles and Permissions Rooms	Altruth, Rev. John		12	7/28/2022	
	Friendson, Mr. Paul 8.	Main Learning Center		7/28/2022	
Talf and Dars	Content, Mas Ann 3.	ABC Learning Center		7/28/2022	
Subject Types					
Subjects					
Grade Conversions					

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 person. If found (perhaps a past student or parent), click to select the line; then click **OK**. If the person becoming staff is not already in the system, click **Add New Person** at the bottom.

First Name	Middle Name	Last Name	Name Suffix	Cell Phone	
admin					
John		Alltruth		555-710-2255	
Paul	в.	Friendson		555-712-4587	
Ann	Э.	Content		555-710-4532	
Robert		Lovejoy			
Rachel		Lovejoy		1	
Christi		Lovejoy			
John		McMercy			
Sarah		McMercy			
Bill		McMercy			
Sandy		McMercy			
Becky		McMercy			
Charles		Upright			
Alice		Upright			
Reginald		Upright			



If adding a new person, a dialog box will appear. Enter data in each of the fields and click **Save**. (Only the fields with bold labels are required.)

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

Whether a person was selected or a new person was added, the Edit Staff dialog box will appear with the Person and suggested User Name filled in.

Edit Staff			×
Person	Virtueson, Ace	Last Login	
User Name	AVirtueson	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 information for this user (bold fields required) before clicking **Save**:

- User Name Enter a user name for logging in. (If a red X shows, that user name cannot be used.)
- Password Enter the desired password in both the Password and Verify fields.
 - Passwords are case sensitive.
 - $\circ~$ Be sure to reset the admin password.
- 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 (usually due to numerous failed log-in attempts), the user will not be allowed to access School Management until unlocked by an Administrator.
 NOTE: If the admin account experiences lockout, have another user in the Administrator role edit to unlock or, if none can log in, contact Technical Support 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.

School Configuration Name Room Lodeed Out Last Login Time About Academic Year + adm - <t< th=""><th>Setup</th><th>🖓 New 🥖 Edit 🙀 Delet</th><th>Help</th><th>-</th></t<>	Setup	🖓 New 🥖 Edit 🙀 Delet	Help	-			
Roles and Permasons Room Room Content, Hes Ann 3. All Clearning Center Content, Hes Ann 3. All Clearning Center Content, Hes Ann 3. All Clearning Center Content, Hes Ann 3. All Clearning Center	School Configuration	Name	Room	Loded Out	Last Login Time	About .	
Room Friendom, Mr. Paul B. Main Learning Center 7/28/2022 Content, Miss Ann J. All Clearning Center 7/28/2022	Academic Year	• adren			2/20/2022	User Guide	
Content, Mss Ann J. AllC Learning Center 7/28/2022	Roles and Permausons	Altruth, Rev. John			7/28/2022		
22ctif and Users Different, Mass Ann J. ABC Learning Center 7/28/2022	Rooms	Friendson, Mr. Paul B.	Main Learning Center		7/28/2022		
	Contractory and the second sec	Content, Mas Ann J.	ABC Learning Center		7/28/2022		
Subject Types	Subject Types						
	Subjects Grade Conversions						

Subject Types

The Subject Types associated with subjects and PACE items in the A.C.E. catalog appear on this list as default (blue shaded) subject types. These cannot be edited or deleted.



etup	Sive 🔅 New 💢 Oriete 🖉			Help
School Configuration	Name	Calor	Display Order	About
Academic Year	+ EX.	(CC3)	3100	User Guide
Roles and Permissions	Reading Development		1.00	
Rooms	Math	255, 255, 0	2.00	
Staff and Users	English	255, 0, 0	3.00	
	Word Building	128, 0, 128	4.00	
ShietTipes	Uterature and Creative Writing	128, 0, 0	5.00	
Subjects	Science	0, 0, 255	6.00	
Grade Conversions	Social Studies	0, 255, 0	7.00	
Courses of Study	Bible Reading	240, 230, 140	8.00	
Grade Types	Eectives .	255, 192, 255	9.00	
Standardoed Testing	College Curriculum		10.00	
Desirable Traits	Spanish curriculum		11.00	
Relationship Types	Testing Materials		12.00	
	Training Materials		13.00	
Note Types	Resources		14.00	
	Forms		15.00	
	Accessories and Supplies		16.00	
	French Curriculum		90.00	
CH				
niles				
dents	1			
ng .				
rentory.				

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

Subjects

If your school has custom subjects that are not part of the A.C.E. curriculum catalog, add them to the School Management **Subjects** list on this page. (PACE subjects from A.C.E. appear shaded blue on this list. They cannot be deleted and are limited on what can be edited.)

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

Subject	×
Name	
Subject Type	
12 😸 PACES	/Units per 1 🕃 credit(s)
GPA Weight 🛛 100 즳 %	Starting PACE/Unit 1001 😜
Is PACE	Ending PACE/Unit 1012 😂
Is Assignable 🗹	Min. Passing Score 🛛 😽 🎯
	Save Cancel



Edit the information for the subject before clicking **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 (scores) 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 (<u>see page 16</u>), these GPA weights may also be used to calculate the Overall High School Average.
- Is PACE Check the box if the subject has PACE-like units. (This links the unit score boxes in Students > Progress Control to Inventory and Billing like PACEs.)
- Starting PACE/Unit Set the starting number for units.
- Ending PACE/Unit Set the ending number for units.
- 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.

Click **Edit** or **Delete** at the top to edit or delete the selected subject. (A.C.E. subjects cannot be deleted and are limited on what can be edited.)

High School Subjects

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

Some areas 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			×
Name	Algebra I		
Subject Type	Math		2
	12 😸 PACEs	/Units per 10.0 🛞 d	redit(s)
GPA Weight	100 즳 %	Starting PACE/Unit	1097 🍣
Is PACE	~	Ending PACE/Unit	1108 😜
Is Assignable	~	Min. Passing Score	80 즳
*A.C.E. Item	*	Save	Cancel



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

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 settings determine the corresponding letter grade and grade points for the numeric scores. Settings are linked to each academic year, and for your first year, the default scale will be applied. The settings from the previous year are used when each new academic year is added.

etup	Side Side	ve 💠 New 💥 Delete	2			Help
School Configuration	11	Letter Grade	Min Score	Max Score	Grade Points	About .
Academic Year	2	A+	381.00	110 00		User Guide
Roles and Permissions		A	96.00	97.00	4.00	
Rooms		A-	94.00	95.00	4.00	
Staff and Users		8+	92.00	93.00	3.00	
			90.00	91.00	3.00	
Subject Types		8-	88.00	89.00	3.00	
Subjects		C+	86.00	87.00	2,00	
Grade Conversions		¢	83.00	85.00	2.00	
Courses of Study		C-	80.00	82.00	2.00	
Grade Types		D+	76.00	79.00	1.00	
Standardized Testing		D	74.00	75.00	1.00	
Desirable Traits			0.00	73.00	D	

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)

NOTE: If editing Grade Conversions, please make sure entries exist for all possible percentage scores (0.00 through 100.00).

Courses of Study/Graduation Requirements

School Management is preconfigured with the graduation requirements for four courses of study:

- Honors
- College Preparatory
- General
- Vocational



School Hunagemen	1				30	ž
as Highland	School				Version 2.0.8238 Logo User: adm	
Setup	Save Save	🗱 Delete 🛛 🥭			Help	1
School Configuration		1.1.0	Courses of Study		About	
Academic Year		Name	Total Required Credits	Base Gredita	User Guide	
Roles and Permissions		Plonons	22,011	121.52		
Room		College Preparatory	25.00	17.00		
Staff and Users		General	23.00	15.50		
Subject Types		Vocational	22.00	18.00		
Subjects						
Grade Conversions						
Courses of Study			Subjects for Honors			
Grade Types	Seve 45 New \$	Odete 2			2	

Only PACE subjects published by A.C.E. are included at installation, so it is recommended that you make adjustments to the default courses of study to reflect your school's requirements with any added non-PACE subjects.

A custom course of study can be added by clicking **New**. Enter a Name and number of Total Required Credits. The Base Credits will be automatically calculated as subject requirements are added to the subjects list.

To delete a course of study, select the line and click **Delete**.

To add subjects for a course of study, select the line in the Course of Study grid and 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 Chemistry for all students on the College Preparatory Course of Study, add that course to the College Preparatory Course of Study. (By default, the College Preparatory Course of Study allows a student to choose Chemistry or Physics for the third Science credit. These would not be on this list, but such "electives" would be added individually in the Students section.)

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 sequence options appear when selecting Level for a student throughout the program.
- 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**.

Grade types can be deleted using the **Delete** option so long as no students have been assigned to them.

Standardized Testing

Standardized Testing setup allows you to enter any number of standardized tests and score areas for storing in students' records.

Click **New** for the Add New Standardized Test dialog box. Enter the Name and Provider. In the Score Areas, click **New** to Enter Name with minimum and maximum numeric scores for each Score Area being added. Click **Save** when settings are complete.

A standardized test can be edited by clicking **Edit** or (if no student records have been added) deleted by clicking **Delete**.

Desirable Traits

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.

Though not recommended, a desirable trait can be added to an existing category using **New** to add a line to enter the Name, Category, and Sequence. An added trait will go to the proper sequence order when you click **Refresh** and trait can be edited by modifying that line. Clicking on another line automatically saves changes to the trait.



Setup	Save 😓 New 😫 Delete 📿 Expan	ed All Collapse All		Help
School Configuration	Name	Category	* Sequenz	About
Academic Year	Entrany Work Nation		100000000000000000000000000000000000000	User Guide
Roles and Pennsusions	Follows Directions	Work Habits	10	Antonio
Rooms	Works Well Independently	Work Habits	20	
	Does Not Disturb Others	Work Habits	30	
Staff and Users	Takes Care of Materials	Work Habits	40	
Subject Types	Completes Work Required	Work Habits	50	
Subjects	Achieves Computer Assignments	Work Habits	60	1
Grade Conversions	Category: Social Traits			
Courses of Study	Is Courteous	Social Traits	70	
Grade Types	Gets Along Well with Others	Social Traits	90	
Standardized Testing	Exhibits Self-Control	Social Traits	90	
	Shows Respect for Authority	Social Traits	100	
Depresident Trades	Responds Well to Correction	Sodel Trafts	110	
Relationship Types	Promotes School Spirit	Social Traits	120	
Note Types	Category: Personal Traits			
	Ability to Establish Own Goals	Personal Traits	130	
	Successfully Reaches Goals	Personal Traits	140	
	Displays Flexibility	Personal Traits	150	
lome	Shows Creativity	Personal Traits	160	
mlei	General Overall Progress	Personal Traits	170	
	Attitude Toward Computer Learning	Personal Traits	180	
tudents :	the state of the second s			
Brg .				
WERKERY				
eports				

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

Relationship Types

Family members of students are recorded according to their relationship to the students. Many options for Relationship Types are included in this list at installation.

Highland		Venior 201021 Venior 201020 User: admin		
Setup	😡 Save 🕹 New 🗱 Delete 🔁	Help		
School Configuration Academic Yean Robes and Permassons Robes Solaff and Users Solaff and Users Solaffer Users Solaffer Users Gausse of Soudy Grade Conversions Courses of Soudy Grade Types Standardiand Traiting Describe Traits	Name Aunt Coursolor Coursolor Coursolor Coursolor Coursolor Coursolor Coursolor Patter Grandtather Grandtather Grandtather Rother Pastor Soling Therapot Uncle	About User Gade		

To add a new relationship type, click **New** and enter the Name. Clicking on another row automatically saves the new relationship type.

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

If a relationship type has not been used, you can click **Delete** to remove it.



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.

etup	💠 New 🧷 Edit 🞇 Delete 📑			tielp
School Configuration	Name	Can Grant Ments	Can Grant Denerts	About
Academic Year	General		10	User Guide
Roles and Permissions	Academics		1	-
Roome	Osciplinary		2	
Staff and Users	Medical			
	Billing			
Subject Types	Merts	2		
Subjects	Goals	2	3	
Grade Conversions	Privlege			
Courses of Study	100 March 100 Ma			
Grade Types				
Standardized Testing				
Descrable Traits				
Relationship Types				

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

Note Type		×
Name		
Allow Merits 🗹		
Allow Demerits 🔽		
Note Subtypes:		
🕂 New 💥 Delete		
Name	Default Demerits	Default Merits
	Save	Cancel

Enter the desired Name and options to Allow Merits or Allow Demerits. Next, add Note Subtypes (at least one needed for note to work) by clicking **New**. Enter the Name and, if desired, Default Merits or Default Demerits. Click **Save** when finished.

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

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



Billing Plan

Though not in the Setup section of the software, 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 75</u>.

Note: If not previously done, restart the program (log out and back in) after the license is activated in order for the Billing Plans option 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 16</u>. The STMS Data Import cannot be run until you first set up your current school year and at least one billing plan. 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-year 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.

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

Setup	Sive ONew SO	eletz 🥑 Ser in Conert 🛛 🗃			Help 🖬
School Configuration	Natie	Degin Date	End Date	Current Year	About
Adalates Year	1 2022-0023	N/1/2022	e) 4/4/2023		User Guide



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

2. 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**.

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 the families with currently enrolled students. If you wish, 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.

mport	Num	First Name	Last Name	^	imported.	Students	
	106	Mr.& Mrs. D.	Virtueson			and a state of the	I the solution
_					First	Last	Grade
的	109	Mr.& Mrs. J.	McMercy	-	Becky	McMercy	2
(??)	110	Mr.& Mrs. R.	Lovejoy				
	111	Mr.& Mrs. H.	Humblen				
[]]]	115	Mrs. B.	Meekway				
的	116	Mr.& Mrs. I.	Loyalton				
(??)	117	Mr.& Mrs. J.	Observant				
	119	Mr.& Mrs. K.	Seemore				
m	120	Mr.& Mrs. E.	Wentforth	-			
s impo	ort will not		in your new School Mana; student's data. This impor student.			uggested) 🔘 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.

NOTE: Only records from School of Tomorrow Management System version 3.1.1 can be imported into aceconnect School Management. If your STMS version is not 3.1.1, contact Technical Support for assistance. The import utility will not import from older versions.



• 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. T could not be found. Choose an option below.	This subject
O Link ART	
Accessories and Supplies - Accessories and Supplies Bectives - Choose Art Electives - Health Electives - Miracles of Jesus Electives - New Testament Survey Bectives - PE 10 Electives - PE 10 Electives - PE 10 Electives - PE 11 Electives - PE 11 Electives - PE 2 Electives - PE 9 Electives - PE 10 Electives - P	<
Remember this link for other students with ART	
Add ART as a New Subject.	
	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 doe grade must be entered for this subject imported. Choose an option below.	
🛇 Use a Letter Grade	2
O Use a Percentage Grade	<u> </u>

• 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 Vali	d 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.

The import wizaro ha	as completed successfully. There are a few notes a	about the import below.
Student Errors There was an error importing these students. You need to write down this list and manually add these students.	Subject Errors There was an error importing these subjects. You need to write down this list and manually add these subjects to the students.	PACE Errors There was an error importing these PACEs. You need to write down this list and manually add these PACEs to the students.
	Pudge Meekway Math Pudge Meekway English Pudge Meekway Social Studies Pudge Meekway Sociance Pudge Meekway Word Building Pudge Meekway Math Pudge Meekway English Pudge Meekway Science Pudge Meekway Science Pudge Meekway Word Building Pudge Meekway P.E. G3 Pudge Meekway P.E. G4	Pudge Meekway English - 50 Pudge Meekway English - 55 Pudge Meekway English - 55 Pudge Meekway English - 53 Pudge Meekway English - 53 Pudge Meekway English - 49 Pudge Meekway English - 48 Pudge Meekway English - 46 Pudge Meekway English - 45 Pudge Meekway English - 56 Pudge Meekway English - 57 Pudge Meekway English - 57 Pudge Meekway English - 57

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.

- 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 2022-2023 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.)
- 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 duplicates.



Chapter 6

Home Section

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

School Hanagers	ent -				
🦇 Highlar	nd School			Ventors 2.5	2738 Looput
Home	Scripture Due			Ratt R	
Resources	Assigned By	Passage E211111	Start Cole		Attendance Report
Find People Backup,Restore Shutdown Loome Portal Settings					Noout Uner Guide
	Homework Due				
	Student	Goal Subject	Goal Tank	11	
	 McMercy, BII 	Digitih IV	Final Local Pages	5	
	McMercy, Becky	English	Finish Goal Pages	100	
	Lovejay, Christ	Physical Science	Finish Goal Pages	_	
				a	
Home .					
Families					
Students :					
(Mrg					
Inventory					
Reports					
Selup					

Dashboard

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

Resources

Manage resource books with this option.

To add a new resource item, click **New** and enter the appropriate information. ("Book No." can be used to identify multiple copies of the same title. "Location" would be the room where the book is stored when not checked out by a student.) Click **Save** to store the added resource book.



one	Seve 🚯 New 💥 Delete	2 Che	ck In					Help
Dashboard	Name	· Hook No.	Devel	- Location	Checked Out	CO Date		About
Renources.	Clevel 3	110.00000	11.000		and the strength of		-	User Guide
Find People	Christians Courageous	32a	3	ABC Learning	[Not checked out]			
Backup/Restore	Ohistans Courageous	335	3	Main Learnin	[Not checked out]			
Shutdown	Summer Fun with Ace and Christ	30e	3	Main Learnin	[Not checked out]		_	
	Level: 4							
License	 Enabritura Mpb 	414		Harthers	Million, Desky	8/22/2022		
Portal Settings	The Little Green Frog	40a	4	Main Learnin	[Not checked out]	A COLUMN	-	
	Level: S						_	
	Hed	52#	5	Main Leamin	[Not checked out]		_	
	Star of Light	55a	5	Main Learnin	[Not checked out]		_	
	a Level: 6							
	Christians with Courage	61#	6	Main Learnin	[Not checked out]			
	The Pugitive King	60a	6	Main Learnin	[Not checked out]			
	a Level: 7							
	George Mueller	728	7	Main Learnin	Not checked out		_	
	1							
ales 1								
dents .								
10								
THE Y								

To check out a book, select a student name.

Click **Check In** when the resource book is returned to remove the "CO Date" and student name from "Checked Out" (will be reset to Not Checked Out as above).

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

The Find People screen provides a searchable list of all the people (staff, students, family members, etc.) in your database.

Home	🖉 Edt 🙀 Del	ete 🔁				Help
Dashboard	LastName	Protiliane	7 Hidde Name	Home Phone	Cell Phone	About
Repources	7:0	QCR.	0	O	0	Uter Gude
Find Percet	Lovejay	Christ				
Backup/Restore	Lovejoy	Rachel				
Shutdown	Lovejoy	Robert				
License	McMercy	Şərəh				
Portal Settings	Upright	Charles				_
For on Seconda	Upright	Reginald				
in the second						
wilei						
audents						
aling .						
10000						
swenery.						
Inventory Reports						



All individuals show on the list, but the visible list can be limited by typing in the line below the column name. It defaults to show all entries that "contain" what is typed, and only entries matching criteria are displayed in the data grid. Clicking the icon at the left of the column in which you typed can change the kind of search ("Begins with," "Ends with," "Equals," etc.).

Click **Edit** to see more about the highlighted individual. The Edit Person dialog box will display. Additional information may be viewed and, if desired, edited and saved.

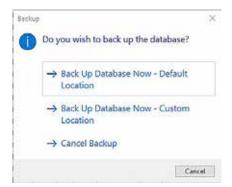
Backup/Restore

To create a backup file or restore the program database from a backup file, click **Backup/Restore**. A list of backup files in the default location will display.

Home	And Other Street Th			User: ad Help
Honse Dashboard Resources Pind People Distuictions Shuiddown License Portal Settings	CyProgram Files (x80/j6/bool Management System)/288adup/16/booManagementSystem_20220721 CyProgram Files (x86/j6/bool Management System)/288adup/16/booManagementSystem_20220721 CyProgram Files (x86/j6/bool Management System)/288adup/16/booManagementSystem_2022011 CyProgram Files (x86/j6/bool Management System)/288adup/16/booManagementSystem_2022032 CyProgram Files (x86/j6/bool Management System)/288adup/16/booManagementSystem_2022033 CyProgram Files (x86/j6/bool Management System)/288adup/16/booManagementSystem_2022033 CyProgram Files (x86/j6/bool Management System)/288adup/16/booManagementSystem_2022033	Backup Date 7/21/2022 11:20:42 AM 7/14/2022 3:08:34 PM 5/24/2022 4:29:16 PM 5/22/2022 4:29:26 AM 4/5/2022 4:29:26 AM 3/7/2022 11:00 PM 2/15/2022 4:11:20 PM 1/31/2022 2:43:39 PM	34	Help About User Gude
famlei Studenta Difeg	C:\Program Files (b80)(school Management System)(DB3xdup)(schooManagementSystem_20220111 C:\Program Files (b80)(school Management System)(DB3xdup)(schooManagementSystem_2021107 C:\Program Files (b80)(school Management System)(DB3xdup)(schooManagementSystem),2021113 C:\Program Files (b80)(school Management System)(DB3xdup)(schooManagementSystem),2021034 C:\Program Files (b80)(school Management System)(DB3xdup)(schooManagementSystem),2021034 C:\Program Files (b80)(school Management System)(DB3xdup)(schooManagementSystem),2021034 C:\Program Files (b80)(school Management System)(DB3xdup)(schooManagementSystem),2021073	1/11/2022 2:18:00 PM 12/7/2023 1:38:27 PM 11/18/2023 1:2-90:21 PM 8/24/2023 1:2-90:21 PM 8/24/2023 1:20:18 PM 9/2023 1:20:18 PM 7/23/2023 3:20:18 PM		
bwentory Reports Setup	C-Program Files (x80/)School Management System/DBIsclaps/SchoolManagementSystem_2020/0722 C-Program Files (x80/)School Management System/DBIsclaps/SchoolManagementSystem_2020/071 C-Program Files (x80/)School Management System/DBIsclaps/SchoolManagementSystem.2020/071 C-Program Files (x80/)School Management System/DBIsclaps/SchoolManagementSystem.2020/071	7/22/2021 3:07:39 PM 1/21/2021 9:53:23 AM 11/19/2020 9:23:03 AM 11/21/2019 3:22:35 PM		

To create a backup file of your database, click **Backup** at the top. When you choose **Backup Database Now** from the Backup dialog box, you can choose to back up to the default location (folder on the hard drive of the SMS Server with files visible in the list of backup files) or to a custom location (allowing you to create the backup file in another folder on the computer, network, flash drive, or external hard drive). **NOTE:** The Custom Location option will only work from the SMS Server computer.





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

WARNING: Restoring a database backup file will overwrite any existing database information.

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, 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 SMS Server for maintenance. A message will be sent to all connected SMS client computers. It is not recommended that you use this feature unless directed by Technical Support.

License

School Management requires a valid license file to be fully functional. As outlined on <u>page 13</u>, **License** is the screen where you can manage your license file and Portal connection. Your Portal User Name and Portal Password stored here must match those used on the Portal website <u>studentmanage.com</u> for Portal Account Status to be "Success."

NOTE: Your school name is automatically set in the program from your license file. To change it, contact Technical Support for help to update the license and **Download License** again.



Portal Settings

The Portal is the communications site for schools with a valid license to use their Portal user name and Portal password to communicate with A.C.E. The account information used to log on at the Portal website (<u>studentmanage.com</u>) should be stored in the School Management database for your school so the Portal Account Status will be "Success," signifying that the software is connected as your school.

Highlar Highlar	2	User: edmin Help
Dashboard Resources Find People Backup/Restore Shutdown	Portal Username technapport Portal Account Status Excession Portal Paseneed Change Catalog and Onders Catalog Lack Updated at (0,0/2022 3x21: 15 PM)	About User Sude
Two Settings Note: Tanka	Update Daly at 04:00 AM C (Costig update may devide system and should be performed after hours.) Update Log Update Log Saved at 3:20:57.6M	
Shadavilla Biling Inventory Reports Lineus	CatalogSin-Cl Updated CatalogStem Third Editon Math 3000 3000 CatalogSin-Cl Updated CatalogStem Third Editon Math 3004 3004 CatalogSin-Cl Updated CatalogStem Third Editon Math 3005 3005 CatalogSin-Cl Updated CatalogStem Third Editon Math 3005 3005	

With Portal Account Status as "Success," selecting **Enable Catalog Updates and Electronic Orders** allows the software to use the connection to help you with keeping up to date.

- You can use the **Update Now** button to request the current catalog information specific for your school at any time. Setting an **Update Daily at** time downloads the updates at the selected time each day.
- At login, the version running is compared with the Latest Version available through the Portal. When a newer (higher numbered) version of the software is released, an Update Available notification will display in the top right of the School Management window where the version number usually displays.



Chapter 7

Families Section

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 75</u>.

Browse Families

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

Highlar Highlar	nd School				Versen 2.6.8238 Loops User: admit
Families	🔷 New Family Wuard 🖉 Edit	😫 Delete 🔁			Run Report
Drunse Fursiles	Billing Name	Billing Plan	Primary Person	Secondary Person	Family Report
	Lovejoy, Mr. Robert and Mrs. R	Church Mender	Lesepoy, MI Robert	I segur, Hrs. Rachel	and a
	McMercy, Nr. John and Mrs. Sa	Standard	McMercy, Mr. John	McMercy, Mrs. Sarah	Help L
	Upright, Hr. Charles and Hrs. A	Church Member	Upright, Hr. Charles	Upright, Mrs. Alice	About User Golde
	Virtueson, Mr. David and Mrs. F.	Whaeson, Mr. David and Mrs. F Church Member Witteeson, Mr. David Writeeson, 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.





• The Add New Family dialog box will appear.

Prefix		Relationship Father	2
First Name			
Middle Name	-		
Last Name			
Suffix		Male O Female	
Address 1			
Address 2			
Address 3			
City			
County	-		
Country	United States		
State		Postal Code	Bold fields are required.

- Primary Person Enter the information for the head of the family and click Next.
- Secondary Person Enter information for the secondary adult for the family (not required) and click Next.
- Billing Information Select the mailing address and choose a Billing Plan. Click Next.
- Students Enter student information. Including Level and Supervisor enrolls the student in the current year. 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** 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** for edit the current person's information. Click is to delete the secondary person.



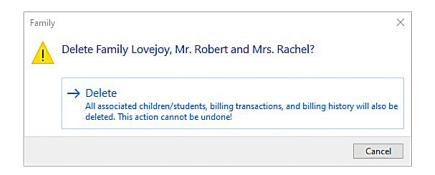
- Mailing Address Select an address from the dropdown list. Addresses entered for the primary and secondary persons are displayed.
- Billing Plan Select a billing plan from the dropdown list.
- Billing Name The billing name for the family is created automatically from the names of the primary and secondary persons, but the billing name can be entered as desired. Clicking **Automatically Set Billing Name** 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.
- Notes Tab Add notes for the family.

Edit Family					
Primary Person Virtueson, Mr. David	2 🖸	Billing Plan	Church Member		
Secondary Person Virtueson, Mrs. Faith	2 🖸 🐹	Billing Name	Virtueson, Mr. David and Mrs. Faith		
Mailing Address Home - Virtueson, Mr. David	i 💟		Automatically Set Billing Name		
Students Notes					
New <i>2</i> Edit X Remove Student Name	1	.evel	Status		
 Virtueson, Ace 		lunior	Enrolled		
Willing, Hudson	t	lst Level	Enrolled		
Willing, Judson	t	lst Level	Enrolled		
			Save Done		

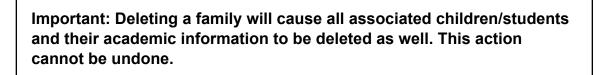


Deleting a Family

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



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





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:

- It is always recommended that students be added in connection to a family. Students are enrolled in the Families section (previous chapter) when the family is first added. To add a student to an existing family, edit the family by clicking **New** in the Students area.
- Though not recommended, the Students → Browse Students page has an option to click New for the Add Student dialog box to appear.

Progress Control

The Progress Control page is where each student's subjects and scores are 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.

🦇 Highlan	d School	Version 2.6.8236 Loopud
Students	🔆 New Subject 👶 New PACE 😫 Delate PACE 🤯 Acad. Vear 2022-2023 🔐 Grade Level: 10	Run Report
Progress Control	Student Lovetry, Onit 2 Add Completed Subjects Ordering Rules	Supervisor's
Quick Score Entry Academic Projection	-Prescribed -Issued -Grdered -In Stack -Passed -Passed	Progress Report Permanent Record

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.

Biology	PACE	1097	1098	1099	1100	1101	1101	1102
biology	Score	97.0	100.0	96.0	92.0	77.0	98.0	97.0



The following menu items are included on the Progress Control page:

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

Non-High School Student

Student Subjects	X
Subject Type	
Subject	
Display Name	
No. of PACEs/Units 12 😜	
Starting PACE/Unit 1001 😜	
Ordering Prerequisite	2
Save Delete Ca	ncel

High School Student

Student Subjects			×
Subject Type	Re	maining Graduation Requirements	
		Subject	Req. Credits
Subject	Þ	Algebra I	1.00 🔼
Display Name		Algebra II	1.00 💷
No. of PACEs/Units 12 😜		Geometry	1.00
Starting PACE/Unit 1001 😜		Trigonometry	0.50
Ordering Prerequisite		English I	1.00
			4
		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 is how this subject will appear on this student's reports, but it may be individualized. 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 Geometry PACEs until Algebra I PACEs are complete, select Algebra I from the dropdown list when adding Geometry. Leave this value empty if it does not apply.

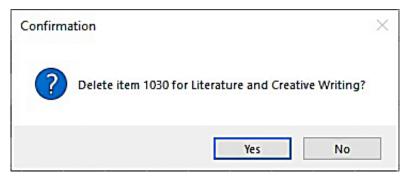
Click Save to add the subject.



New PACE – Click to add PACEs to the current subject, such as gap PACEs. The Add PACE dialog box will appear. Enter the Starting PACE/Unit number (defaults to the next PACE not prescribed) and the No. (of PACEs) to Add. Click **Insert** to add the score boxes.

Add PACE			×
Subject	English		
Starting PACE/Unit	1042 😜		
No. to Add	1 😜		
		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 Defaults to the current academic year. Other years are accessible using this dropdown list.
- Grade Level Displays the student's grade level corresponding to the academic year selected.
- Add Completed Subjects The Add Completed Subject(s) wizard will walk you through the process of adding subjects and scores to past years with just the final average or letter grade.

d Completed Subject	(8)						
Subject Information							
Enter information for	the subject(s) being ac	ided.					
Subject Type	Subject		Is Transfer?	Credits	Average	Grade	Academic Year
1.		New New	🔵 Yes 💿 No	1.00 😂	100 즳 d	or	2020-2021 💟
T							



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

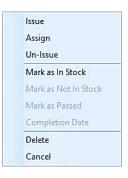
Ordering Rules – These settings default to the school settings on the Inventory -> Subject
 Ordering Rules page. If a student is using a different edition, use this button to edit the
 Preferred Edition field of the subject you wish to change.

Subject Name	Preferred Edition				
Subject Type: Science	2				
Animal Science	(auto)				
Hology.	💟 (atus)				
Chemistry	Edition				
Physical Science	3ND EDITION				
Physics	2ND EDITION 3RD EDITION				
Science	4TH EDITION				
Subject Type: Social Studies	(auto).				
American History					
Economics	23				
Etudes Sociales	(auto)				
Covial Deviae	(auto)				

- 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 The right panel displays shortcuts to applicable reports for the student. Click any link to run that report for the selected student.

Editing Items in Progress Control

After PACEs/Units 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 options work as follows:

• 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 the available inventory. If the PACE was issued by overriding the inventory, it is not added back into the available inventory.
- Mark as In Stock This adds a copy of that PACE item into the inventory assigned to the current student so that it appears in the "In Stock" color.
- Mark as Not In Stock This removes the copy of the PACE item assigned to the current student from the inventory so that it will no longer appear as "In Stock."
- Mark as Passed / Mark as Failed When a score is entered, School Management will automatically mark the item as passed or failed according to the "Min. Passing Score" set for the subject through the Setup -> Subjects list. 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 from the student's records but does not alter the 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.

First, add the non-PACE subject to your school's database: From Setup -> Subjects, click New. Enter a unique subject name (such as Literature 7 or Literature 8), select the Literature and Creative Writing subject type from the dropdown list, and enter 12 PACEs/Units per 1.0 credit(s). Click the Is PACE box to remove the

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

default checkmark. Enter the starting and ending PACE/Unit for the level and click **Save**.



Subject			2						
Name	Literature 7								
Subject Type	Literature and Creative Writing								
	12 😜 PACEs/Units per 1 😜 credit(s)								
GPA Weight	100 즳 %	Starting PACE/Unit	1074 😜						
Is PACE		Ending PACE/Unit	1084 😜						
Is Assignable	\checkmark	Min. Passing Score	80 😜						
		Save	Cancel						

With the non-PACE subject in the school's settings, it can now be added to Students ->
 Progress Control to record scores. Click New Subject to select Literature and Creative Writing as the Subject Type and then the new, non-PACE subject from the dropdown list. Set the No. of PACEs/Units to 12, and verify the Starting PACE/Unit. Click Save and the subject will display in Progress Control.



• Literature 7 and 8 do not have tests for all the PACE numbers of the levels. Right-click each PACE/Unit number not needed to choose **Delete**.

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 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, click "**+ Add**" at the top.



School Managemer						Version: 1.9.6951 Logout
🦇 Highland	School					User: admin
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, each student's high school graduation requirements, listing subjects to be awarded high school credit, are managed. The Graduation Requirements area is where most of the editing takes place, with Current Year Subjects, Credits/GPA, and Previously Completed Subjects areas.

students	-50	udent W	succert,	Ace 🎴	Course of Stu	dy H	toric	ns 🔐 🎾 Remove Ac	tive 😳 Ad			Rut Re	rport	
Progress Control				ation Requires				Current Year Subjects		Credity	GPA		kaderne -	
Quick Score Entry		Credits			Required			Subject	Orests				Projection Report	
Academic Projection	2	1.00			3	6		Geometry	3.0(1.5			-		
Onterparter		0,50	Trigon		2			English II	1.0/1.0	Required Electives	22.00	Help		
ABCK			Ingish		8	Ξ.		Physical Science	1.0/1.0	Total	~~~		Voout	
			English		2			American History	1.0/1.0	Required	27.00		her Gude	
Attendance		1.00	Cherrie		2			Spanish I	1.0/1.0					
God Check		1.00	Physics		8			New Testament Church History	1.0/1.0	WEIGHTS!	7.50			
Holsework Assignment		0.50	Econor	19.72	8			Old Testament Survey	1.0/1.0	Completed Current	7.50			
Merits and Demerits			u.s. o		8		Ľ	Physical Education 10	0.5/0.5	Remaining	12,00			
Scripture Memory		1.00		Geography	2	-								
Descrable Trats		0.50	Music		2		1			GPA: 4				
Standardized Testing		-Current s	ubject.	-Completer						is nig.				
Privilege Status						Parent of	2000	sly Completed Subjects				1		
		Ored	· · · · · ·	Subject					100 1000 100	Completed				
Browse Students	2	1.00		Agera1-						2020-70/1	2			
		1.00		English 1						2020-2021				
		1.00		Etymology						2020-2021				
		1.00		Biology						2020-2021				
ome		1.00		World History						2020-2021				
andes		0.5		Health						2020-2021				
adente:				Speech New Testament						2020-2021				
ling		1.00		Physical Educato					-	2020-2021				
ung		0.94	1.1.1	Physical Educato	our v				99.50	2020-2023				
nventory														

Assigning a Course of Study

First, fill in options across the top. If not already selected, choose a student from the dropdown list.

To assign or change a student's course of study, make a selection from the dropdown list. Assigning a course of study puts its required subjects into the student's Graduation Requirements list.



To remove a student's assigned course of study, click **Remove**. After confirmation, all graduation requirements (including any that have been added) will be removed.

Click the **Active** button to allow not only enrolled students but all students with records to be selected from the Student list.

Add a new subject to the Graduation Requirements list by clicking **Add** in the menu bar. Enter the credits and subject.

Delete an existing graduation requirement by selecting the subject on the list and clicking **Delete** in the menu bar.

Graduation Requirements

The individualized graduation requirements for the selected student display in the Graduation Requirements area. This list includes columns for Credits, Subject, and Required.

Only subjects included in the Graduation Requirements list of the student's Academic Projection will be awarded high school credit and appear on the student's transcript. Subjects added to the graduation requirements by the course of study will have a checkmark in the Required column. Use the Add option at the top to add subjects to the Graduation Requirements list for high school credit and appearance 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.

The program highlights lines in the Graduation Requirements list in blue or green to indicate which subjects have scores in the current or previous academic years.

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 PACE/Unit scores 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 (such as linking Math PACEs 1091-1096 scores to a Math Graduation Requirement for a half credit).
- A student transfers a subject from another school and space. (Example: English I was added for a student as a completed transfer subject. You would link the score in his records named English I* to the English I Graduation Requirement to indicate he met the requirement.)

To link specific subject scores to a graduation requirement, right-click the subject in the requirements list and click **Link Completed Subjects**. A form will display showing all completed PACEs/Units of that subject type. Check the **Link** column for each score to link it to the graduation requirement and click **Save**.

Students	:Shie	test Paring inter	Course of Study Colored Pater	> Remove w/Inac	LAN S	Deleta	Run Report	1
Progress Control	Link	Student Subject	or: English I	13 12 14			Academic Projection	
Quick Score Entry		nk Linked To	Name	Unthunber	Score	Completion Date	Report	
Asselution Projection	2		-0	-	-	-	High School Transcript	
Cindergarbert	I	2	English 1*	1	96.00	\$/30/0020		_
ABCK			English 11*	1	98.50	5/29/2021	Help	
Attendance	1		English III*	1	99.00	5/28/2022	About Lituer Guide	
Standardoed Testing Privilege Status Proving Status								
Privlege Status Browse Students								
Privlege Status Browse Students one								
Hvidege Status Browse Students sme endes								
Hiveleye Status Browse Students one antics strong								
Phyloge Status Browse Students one emiles Through								
Privlege Status Browse Students one antics stratus Reg werstory								
Privlege Status		ert 44			Save	Great		

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

Subjects with scores in previous years display in the Previously Completed Subjects area. This area includes Credits, Subject, Average, and (academic year) Completed.



- The Credits column displays awarded credits. In order for the student to receive credit for previously completed subjects, the subjects must be listed in the Graduation Requirements list.
- You can right-click a line to choose **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**.

Descriptio	n for: Algebra II		×
New Name	Algebra II		
		Save	Cancel

Credits/GPA

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

- Required The number of base credits required for graduation for the course of study
- Electives The number of elective credits required for graduation
- 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 automatically recalculate the values in this area.

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. Kindergarten lessons must be added to make use of the Kindergarten Progress Report for this student. 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. ABCs lessons must be added to make use of the ABCs Progress Report for the student. 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)

半 Highland	d School								admin
Students	Save 2	Post Test Sco	e P	out Test Date	6			Run Report	- 2
Progress Control Academic Protection	Student Willing, 1	tudson						ABCs Progr Report	resa
Kndergarten	Lesson	Letter Recognition	Sounding of Letter	Leffer Formation	blending of Sounds	Physical Development	Bible Memorization	Help About	- 22

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 in the Students section for entering attendance: Attendance page and Goal Check page.

The Attendance page allows the logged-in staff member to see all of his students (or All Students by checking the box) for the selected school day to set the attendance for each of them.

Students	Date 9/16/2022	🗌 🖾 All Students 🤁
Progress Control	Student Full Name	Status
Quick Score Entry	Lovejoy, Christi	Present
Academic Projection	MdMercy, Becky	Present Absent (I) Absent (II) Tardy (II) Tardy (II) Suspended
Kindergarten	McMorcy, Bill	Present Absent (E) Absent (U) Tardy (E) Tardy (U) Suspended
ABCs	McMercy, Sandy	Present O Absent (E) O Absent (U) O Tardy (E) O Tardy (U) O Suspended
	Upright, Reginald	Present Q Absent (E) Q Absent (U) Q Tardy (E) Q Tardy (U) Q Suspended
Altendance	Virtueson, Ace	Present O Absent (E) O Absent (U) O Tardy (E) O Tardy (U) O Suspended
Goal Check		
Homework Assignment		
Merits and Demerits		

By default the date is set to the current day. If the date is not a school day, Not a valid School Day shows with no students listed.

Date	7/4/2022	All Studen	its 🔁	Not a valid School Day
Stu	ident Full Name	:	Status	

The date can be changed by typing a date into the field or using the dropdown calendar. The following values are available to set for each student's attendance that school day. Values are saved automatically.

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

Attendance may also be entered for specific students on the Goal Check page.



Goal Check

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

Progress Control Quick Score Britry Academic Projection Godorparteet ABCS	ATTIRDANCE Student Full Name Lovepry, Ones GOAL CRECK St Delet Subject		Status	072 🗋 🔁				Ments and De.
Academic Projection Kinderparten AbCa	Lovepy, Onist GOAL CHECK SE Delet							1011222022
Kinderganten ABCk	GOAL CHECK SE Delet		• iterest	CONTRACTOR OF STREET, STRE				Help
Apps	the second s	Contract Manager		O Monanti (D) O Al	neer dit 🙂 Trivity ()		O serended	About
	Dated	ALTONN PROPARIOUS					CONTRACTOR OF THE OWNER	User Gude
	- Stadient	Mon	Tues	Wed	Thurs	Iri		
ktlendance .	Algebra 1	6		2	<u></u>	•	25	
and these	English 1				2			
komework Assignment	Etymology			2	2	2		
nerits and Dements	Bology		2					
kripture Henory	Visurid History		2	8	2			
	New Testament Survey			2	2	2	20	
Sesirable Traits	HOMEWORK ASSIGNME	NT New	/ Edit 🙀 Delete		14	1.44	11100	
Standardued Testing		Ical Task	Due On	Completed On	From Page	To Page	Signed On	
Privlege Status	the second s	and a second	a house in	and the second second second	and the second second	and the second se		
Browse Students								
ne .								
sles	GOAL NOTES MERITS A	ND DEMERTTS	ALL NOTES ON No	w Ente Dele	de .			
	Date (Dreahed By	Detail	Note				
100 m								4
derra								
dara N								

Entering Attendance Information

With the student selected and current day selected in the Week Including field, select the attendance status for the day in the Attendance area.

Entering Goal Check Information

The student's subjects display for the Goal Check status to be selected from the dropdown list for each day of the week for each subject. Selections are saved automatically.

Adding a Homework Assignment

Homework assignments can be added from the Goal Check page or from the Homework Assignments page.

From the Goal Check page, add a homework assignment for a selected student by selecting **New** beside the Homework Assignment header. The Add New Homework Assignment form will display with the selected student filled in.



Student	Virtueson, Ace	Assigned On	8/11/2022	5
Subject		Due On	8/11/2022	
Task				
From Page	To Page			
Notes				
Signed On	Not Signed			Is Printed
ompleted On	Not Completed		Save	Done

Enter necessary information into each field:

- Assigned On Defaults to the current date
- Due On Select the date following the Assigned On date. NOTE: Dates can be changed by typing the desired date or by using the dropdown calendar.
- Subject Select a subject from the dropdown list.
- Task Defaults to Finish Goal Pages. Modify this field by typing in a different task.
- From Page / To Page Enter the pages of homework.
- Notes Type a message about the assignment to print on the Homework Assignment report 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**.

	Goal Subject	Goal Task	Due On	Completed On	From Page	To Page	Signed On
Þ	Science	Finish Goal Pages	5/10/2022		9		
	English	Finish Goal Pages	5/10/2022		10	12	

A line for each homework assignment will appear in the Homework Assignment area.

To edit a homework assignment, select the line and click **Edit**. Edit Homework Assignment will open to let you make necessary changes and click **Save**. When finished, click **Done** to close Edit Homework Assignment.

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

(Homework may also be managed on the **Students** -> Homework Assignment page.)

Student Notes

Student notes are managed in the bottom area. There are three display options.



- Goal Notes The default display shows notes of the Goal Notes type for the selected student.
- Merits and Demerits Click to display a list of notes for this student with merits and demerits.
- All Notes Click to display notes of all types for the selected student.

Options are given to edit notes, add new notes, or delete notes.

- New Used to add a note for the selected student. Add Note will display for you to use the dropdown lists to select the Date, Note Type, and Note Subtype. Type the content of the note in the text box and then click **Save**. The note will appear in the Notes list (if the display selection matches).
- · Edit Used to edit the note for the selected line
- Delete Removes the selected note (when confirmed)

Homework Assignment

Homework assignments for all students can be managed on this page. By default, only incomplete homework assignments are displayed. To show all assignments, click **Show Completed** at the top. Other options at the top are:

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

Add New Ho	mework Assignment		×
Student		Assigned On	8/11/2022
Subject		Due On	8/11/2022
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 Displays Edit Homework Assignment to make changes to the selected assignment. After making edits, click **Save**.
- Delete Removes the selected assignment (when confirmed)



- Print Selected Prints the homework assignment report for only the assignment on the selected (highlighted) line
- Print Unprinted Prints homework assignment reports for all homework assignments with Printed unchecked

Merits and Demerits

Merits and demerits are added through the student notes and are managed on this page. Select a student from the dropdown list to work with the notes with merits or demerits for the student.

 New – Opens the Add Note form. Selecting a Note Type (like Goals) that allows for merits and/ or demerits will give fields and allow you to enter a value. Complete all fields and click Save.

Created By	adnin		Created On	(33/2022.203620.6M	
Updated By			Updated On		
Date	8/11/2022		Merita	5 🔂	
Note Type	Goals	2	Demerita	0 🛃	
iote Subtype	Bible Portion Quoted				
Text					Ľ,

A note saved with Merits or Demerits values will display in the Merits and Demerits grid.

Promess Control		dit 🧱 Delete	2					Help.
Progress Control Quick Score Entry	Student McHer							About Uter Guide
	For Date	Oreated By	Type	+ Subtype:	Meres	Denerits	Test	
Academic Projection	 1/24/2021 	admin	Deepleary	Doruption			1 Decky was taking without persisten in	
Kindergarten	1/21/2021	admin	Morita	Act of Kindness	25		Becky was observed helping Hudson h	
ABCs								
Attendance								
Goal Check								
Homework Assignment								

- Edit Opens Edit Existing Note to make changes to the selected note. Click Save to store the changes.
- Delete Removes the selected note (when confirmed)



Scripture Memory

Manage Scripture Memory assignments on this page. All assignments for the current year will be listed.

Highland Highland	S	chool				Venior: 1.6.5120 Logoul User: admin
Students	q	New 🥖 Edit 😫 Dele	a V- 2			Help
Progress Control	F	Passage	Start Dote	Due Date	Created By	About
Academic Projection		2 Timothy 1:1-5	6/20/2112	9/20/2012	IN STR.	User Guide
Kinderparten	16	2 Timothy 1:1-9	8/20/2012	9/28/2012	admin	
ADCa		2 Timothy 1:11-14	90/1/2012	10/31/2012	admin	
Attendance		2 Timothy 1:10-18	10/1/2012	10/31/2012	admin	
		2 Tmothy 2:1-4	11/1/2012	11/30/2012	adren	
Goal Check		2 Timothy 2:1-13	11/1/2012	11/30/2012	admin	
Homework Assignment		2 Tinothy 2:22-26	12/1/2013	12/20/2012	admin	
Merits and Dements		2 Timothy 2:14-25	12/1/2017	12/20/2012	adnin	
Support Network	1	2 Timothy 3:1-5	1/5/2013	1/30/2013	admin	
		2 Timothy 3:5-9	1/5/2013	1/30/2013	admin	

The actions available on the Scripture Memory page are:

- New Opens Add New Scripture Assignment to create a new Scripture Memory passage to assign to students
- Edit Opens Edit Scripture Assignment for the selected passage (to change or record completion for students)
- Delete Removes selected passage (when confirmed)
- 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 Enter the Scripture reference.
- Start Date Enter the date by typing or select using the dropdown calendar.
- Due Date Enter the date by typing or select using the dropdown calendar.

Edit Script	ure Assignment				*
Created By	attan.				
Passage	Genesis 1				
Start Date	8/29/2022	2	Due Date	9/30/2022	2
Assigned St	udents				
Assign	To • 🙀 Unassign				
Student				Completed Date	
Devejoy, (Christi				
McHercy,	60				
McMercy,	Sandy				
Upright, R	reginald				
Writumson,	Ace				
				Save	Cancel



Click **Assign To** for options to assign the Scripture to My Students, All Current Students, Select (individual) Student, or Select Learning Center.

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

To enter a completion date for a student, edit the Completed Date field by the student's name by typing the date or select the date using the dropdown calendar. Click **Save** when you have finished modifying items.

Desirable Traits

Enter the Desirable Traits scoring for each student on this page.

tudents	Student 🛛 😅				Help	-
Progress Control	Trat	1	2	3	 About	
Quick Score Entry	Category: Work Habits				User Guid	e.
Academic Projection	Follows Directions					
Kindergarten	Works Well Independently					
ADCK -	Does Not Disturb Others					
Attendance	Takes Care of Materials					
ALC: NOT THE REAL PROPERTY OF	Completes Work Required					
Goal Check	Achieves Computer Assignments					
Homework Assignment	Category: Social Traits					
Merits and Demerits	Is Courteous					
Scripture Memory	Gets Along Well with Othens					
Describe Trats	Exhibits Self-Control					
Standardzed Texting	Shows Respect for Authority					
	Responds Well to Correction					
Privilege Status	Promotes School Spint.					
Browse Students	 E Cologory: Personal Trata 					
	Ability to Establish Own Goals					
	Successfully Reaches Goals					
	Osplays Flexibility					
ane.	Shows Creativity					
mårs.	General Overal Progress					
Marca .	Attstude Toward Computer Learning					
ing						
wentory						
menon y						

Select the desired student from the Student dropdown list. Lines for each desirable trait are displayed with names at the left and columns to enter scores for each academic year period. Enter values in the columns using the following scale:

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

Entered items are automatically saved.



Standardized Testing

The Standardized Testing page allows you to record standardized test scores for students. Before entering scores, you must configure Standardized Tests in the Setup section. See <u>page 30</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 test record, select the line and click **Edit**. The Edit Standardized Test form displays. Make all changes and click **Save**.
- Delete Select the line of the test record you wish to delete, click **Delete**, and confirm.

Privilege Status

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

tudents	🖓 Add 🚽 Save 🗱 Cle	jat .		Help
Progress Control	Student	Privlege 1	Status Wyek Of	About
Quick Score Entry	Writueson, Ace	E	8/26/2022	User Guide
Academic Projection	X		6/26/2022	
Ordergarbert	1			
ARCI				
Attendance				
Goal Check				
Homework Assignment				
Homework Assignment. Merits and Dements				
Goal Overk Homework Assignment Herits and Dements Scripture Memory Description Trafts				

Action options for the Privilege Status page are:

- Add Puts an additional entry line on the page. Enter columns on each line by selecting a student and privilege status from the dropdown lists. The Week Of field defaults to the current date but can be changed.
- Clear Clears all data from the Privilege Status page
- Save Stores the visible entries as student notes



Entries only show on the Privilege Status page while being entered. When saved, Privilege Status is stored as a Privilege Note for each student. Privilege status notes can be seen in **Students** \longrightarrow **Goal Check** in the Notes area by clicking **All Notes**. The Privilege Note type will display with the letter selected as Detail.

Date Created By Note Type Detail Note 8/26/2022 admin Privilege E	G	DAL NOTES MERI	TS AND DEME	ALL NOTES	🕂 🕂 New 🖉 Edit 🞇	Delete
▶ 8/26/2022 admin Privilege E		Date	Created By	Note Type	Detail	Note
	Þ	8/26/2022	admin	Privilege	E	

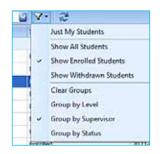
Browse Students

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

Students	New CEde	2022-202	8 <u>0</u> 7 2		Go to Area	10000
Progress Control	Name	Level	Status	* Academic Year	Herts and	De
Quick Score Entry	Supervisor: Co	ontient, Mus Ann J.	100000		Run Report	
Academic Projection	 Willing, Hudso 	n lation	tamaked	2023-2023	and the second second second	
Kindergarten	Wiling, Judso	n 2stLevel	Ervilled	2022-2023	Help	
ABCI	Supervisor: Pr	iendson, Mr. Paul B.			About.	
Attendence	McMercy, Bed	ky 4th Level	treoled	2022-2023	User Guide	5
and a share and a	Mohercy, San	ndy Sth Level	Envoled	2022-2023		
Goal Check	Lovejoy, Chris	til Stohonore	theoled	2022-2023		
Honework Assignment	Upright, Regi	hald Sophonore	Encoled	2022-2023		
Ments and Dements	Writueson, Ao	e Junior	Envoled	2022-2023		
Scripture Meterry	McMercy, 68	Serior	fixoled	2022-2023		
Desirable Trats						
Standardzed Testing	1					
Privilege Status						
Browger Students						
me .						
mle:						
odentir						
ing						
ventory						
eports -						
eto	S P Press - S	HIPO:			Strove	

It defaults to the current year, but selecting another year in the Acad. Year dropdown list will display the students for that academic year.

Note: Browse Students defaults to show only enrolled students grouped by supervisor. The filter button can be used to change which students are displayed and how/if they are grouped.





Action options for the Browse Students page are:

- New Opens Add Student to create a new student (It is recommended to create students through Families rather than using this option.)
- Edit Displays the Edit Student form, allowing the user to make changes to the student's information
- · Delete Permanently removes all records of the selected student

Adding a Student

Click **New** for Add Student to create a new student. (It is best to create students through Families to ensure that important connection.) Edit the fields as outlined below and click **Save**. (Clicking Done closes without saving entries.)

Editing a Student

Click **Edit** to open Edit Student to alter the information for the student highlighted in the list. The top portion of Edit Student (or Add Student) has the following fields to enter information (bold fields are required):

- First Name
- Middle Name
- Last Name
- Family (select from existing families)
- Gender
- Birthday
- Student ID
- Citizenship
- Graduation Date
- Withdrawal Date

Additionally, there is a frame for including a picture in the upper left. Right-click inside the frame for options to load an image from a file or paste a copied image.

	First Name	Hudson	Gender	M	
	Middle Name		Birthday	5/5/2006	2
[None]	Last Name	Willing	Student ID		
	Family	Virtueson, Mr. David an 🍟	Citizenship	666-66-6666	
			Graduation Date	-	
	-		Withdrawal Date		
				2	201172
evels Notes Re				Print Permanent	



The bottom portion of Edit Student (or Add Student) has the following tabs for accessing additional student information:

Levels

This tab displays lines for each year/level the student has records. Each line has information for Academic Year, Level, Supervisor, Enrollment Status, and Enrollment Date.

- To enroll the student in a new level, click **Enroll** and enter information for all columns of the added line.
- To withdraw the student who leaves before the end of a school year, click the line for the level and click **Withdraw**. The option will be given to withdraw or delete the student from the year. If the student has records in the year, Withdraw is recommended to retain records.

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.

- To add a relationship, click **New**. Select a person (or add a person) using the <u>button</u>. Set the Relationship and Guardian, Pickup, and Medical privileges; then click **Save**.
- To delete a relationship, click the line of the relationship to highlight it, click **Delete**, and confirm.

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 a guardian is defined in Relationship, you can use his address for the student, or enter a custom address for the student.

Final Edit Student Reminder: Click **Save** to close Edit Student and save any changes. Clicking Done or the X to close will not save any changes.

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!**



Billing Section

Family account balances, financial transactions, and billing activity are managed on the pages of the Billing section.

Balances

The Balances page allows you to view the current outstanding balance for each family in School Management. The Print action option runs the printable Balance Report.

Transactions

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

Highland	J SCHOOL					Use	r: aðrin
pulling	Family Lovejoy,	W. Robert and Mrs. Rad				Run Report	6
Balances	Post Transaction				_	Transacti Report	on
Transactions Diling Runs	Transaction Date	8/12/2022	Anount	(\$0.00	Help	-
Billing Hans	Check No.		Transaction Type	Debit	2	About	-
Batch Transactions	Description				-	User Guid	le 🤇
	Details						
		Delete Z			Save		
	nevene 34 L		Amount Desc	plon			
tome	and the backer and an entertail.	Date					
	Trans Type	Date		index Tubler and PACEs	8	3	
'andes	Trans Type	10000	111.00 Sept	inter Tablecturel PACEs rsing transaction for: August Tutton and PACE	a	2	
'ansles itudents	Frans Type	0345034	171.00 Core 302.50 Reve		•		
anika Rudenta Mary	Trans Type Debit Payment Debit	01345310 1/13/2014 1/13/2014 1/13/2014 1/2/1/2012	302.50 Reve 302.50 Reve 302.50 Augu 250.00 Tube	rsing transaction for: August Tution and PACE at Tution and PACEs in for Christi			
ianskes Rudents Skor) Inventory	Trans Type	1/14/2014 1/13/2014 1/13/2014 1/13/2014 12/1/2012 11/1/2012	1771.00 2- 302.50 Reve 302.50 Augu 250.00 Tuto 250.00 Tuto	rsing transaction for : August Tutton and PACE at Tutton and PACEs in for Onist in for Onist			
Home Families Students Effect) Inventory Reports	Trans Type Debit Payment Debit	01345310 1/13/2014 1/13/2014 1/13/2014 1/2/1/2012	1771.00 2- 302.50 Reve 302.50 Augu 250.00 Tuto 250.00 Tuto	rsing transaction for: August Tutton and PACE et Tutton and PACEs in for Christi in for Christi fees for Lovejoy, Christi fees for Lovejoy, Christi			

Adding a Manual Transaction

To add a manual transaction, enter the information in the Post Transaction area fields:

- Transaction Date Date of the transaction (defaults to current date, but can be edited)
- Amount Amount of the transaction
- Check No. (optional) The number of the check, if applicable, when the transaction type is Payment
- Transaction Type Type of transaction, including Debit (charge), Payment, or Credit



- Description A brief description of the transaction (appears on statement)
- Details (optional) A more detailed description of the transaction

Click **Save** to post the transaction.

Viewing Transactions

The lower half of the Transactions page 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, unlike when reversing a transaction, the record is completely removed. To delete, select the line of the transaction in the list and click **Delete**. You will only be allowed to delete transactions entered since the last billing run (more recent in list than all tuition debit transactions). Transactions from previous billing runs cannot be deleted.

Billing Runs

The Billing Runs page is the heart of the billing section. The billing run is the monthly process that posts all tuition and PACE charges since the previous billing run. It also posts and reconciles all accounts and transactions that have been entered since the last billing run. The page lists previous billing runs for the current academic year. Family account statements print based on these billing runs.

半 Highlan	d S	chool				v	enion: 2.0.6236 Locov User: admin
talkeg	1	New 🕱 Dele	er 2				Help a
Balances	1	Sill Cwbr	Run Dote	Total Transactors	Ordits	Deb/b	About
Transactors		8/1/2012	1/11/2014	4	\$16.25	\$5,039.00	User Guide
- Inling Furns		9/1/2012	1/11/2014	4	\$3,820.50	\$3,460.00	
tilling Plans		10/1/2012	1/13/2014	4	\$1,689.50	\$2, 179.50	
Batch Transactions		11/1/2012	1/15/2014	4	\$2,179.50	\$3,377.97	
and any in a second a		12/1/2012	1/15/2014	4	\$66.25	\$2,064.48	



The following actions are available:

• New – Starts the process for a new, monthly billing run. The first option will be to select the date for the Bill Run (defaults to current, but can be set to a past date) and click **Process**.

Bill Run		×
Billing Date	8/12/	2022 📓
Proces	s	Cancel

The Bill Run works to apply all transactions to family accounts, apply PACE fees based on Bill PACEs settings (see page 17), and apply tuition charges based on Billing Plan settings (see next section). The new billing run will appear on the list, and all transactions included in the billing run will then be able to appear on the statement report for each family account.

• Delete – Deletes the selected billing run. This action will remove all transactions (calculated or added) that were posted with the billing run.

Billing Plans

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

a School Hanason 🆇 Highla	and the second se			and the second se	
6ding	🚱 New 🖉 Edit 🞇 Delete 🔒	2		Help	
Balances	Name	Biling Cycles	Decount (%)	About	
Transactions	 Church Member 	10	.023	User Gude	
Billing Runs	Standard	10	.00%		
- Ming Plans					
Batch Transactions					

The following actions are available:

- New Opens Add Billing Plan to create a billing plan
- Edit Allows you to edit the selected billing plan
- Delete Allows you to delete the selected billing plan (if not assigned to any families)



Adding/Editing a Billing Plan

When adding a new billing plan, enter the Name and the number of Billing Months desired. Click **Save** for the additional entry options to appear.

Add Billing Pl	811	×
Name Billing Months	Members	Save Close

After saving a new billing plan or editing an existing plan, the following areas and fields are available for modification:

- Tuition Amounts (Annual) Allows you to designate the **Annual Tuition** for each level. To set all levels the same, enter the Annual Tuition amount in the line at the top of the list, click to another line, then click **Make All Same**.
- Discounts Allows you to add discount percentages for this billing plan (calculated as a
 percentage of the annual tuition installment). While the overall annual tuition settings can be
 used for a different tuition rate for all families assigned a plan, Discounts allows Statements
 to show families their discounts off the tuition charges. For billing plans with discounts, Bill
 Runs creates transactions for not only a debit (charge) labeled "Tuition for [Student Name]" for
 each student, but also for a credit labeled "Discount" for those that apply. The discount options
 available are:
 - Overall discount: Will add a credit labeled "Discount for [Student Name]" to all students in the family account (can combine with the family's multiple student discounts below).
 - Additional student discounts: For families with more than one child, percentage discounts for students after the first (up to ten) can be set. Credit transactions are labeled "Discount for child #." If you wish to make all discounts the same, enter a value on the **2nd Child** line, and click **Make All Same**.
- Months to Bill Allows you to designate which months to bill for tuition. Click the box by the months you plan to bill tuition. The Billing Months number will update as the number of months selected changes. This determines the number of installments for the annual tuition. With Billing Months at 10, a debit for one-tenth the annual tuition would be charged by the bill run in each checked month. With Billing Months at 4, one-fourth of the annual tuition would be charged by the bill run in checked months.



Be sure to click **Save** when all entries are as desired. (Close will not save entries.)

Name	Members			
Billing Months	10 😜			
Tuition Amounts (Annual)	Level	Annual Tuition	Months to Bill Select All	🗹 Jan 📃 Jul
Make All Same	▶ КЗ	\$2,000.00 🔼	<u>Delect All</u>	🗹 Feb 🗹 Aug
	Pre-K	\$2,000.00		✓ Mar ✓ Sep ✓ Apr ✓ Oct
	K4	\$2,000.00		May Nov
	К5	\$2,000.00		📃 Jun 🗹 Dec
	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 😜 %			
	2nd Child 10 😜 %	7th Child 100 🌏 %		
	3rd Child 20 🍚 %	8th Child 100 즳 %		
	4th Child 40 😜 %	9th Child 100 즳 %		
	5th Child 60 😜 %	10th Child 100 즳 %		
	6th Child 80 즳 %		Sav	e Close

Miscellaneous Fees

Miscellaneous fees (non-PACE curriculum charges, graduation fees, activity fees, etc.) can be billed to a family account several ways.

- 1. Fees can be charged manually to each individual family to which they apply by adding a manual debit transaction. <u>See page 73</u>.
- 2. Fees can also be included with the annual tuition for a specific level within a billing plan that includes the fee as a part of the families' tuition cost. For example, the annual tuition for 7th level can be raised to include costs for the non-PACE Basic Literature 7 subject. The cost is then included in the tuition installments for the student rather than a separate transaction on any statements.
- 3. Batch Transactions see below



Batch Transactions

The Batch Transactions page allows you to create transactions that can be entered once and applied to multiple families or students. This can be used for any transaction that would be applied similarly to multiple families. Examples are field trip fees, non-PACE curriculum charges, graduation fees, staff family credits, and scholarships. After adding a batch transaction to the list, it can be used repeatedly, affecting selected families or students each time.

🖇 Highla	nd School				Version 2.8.6236 Loops User: admir
tulling	New 🖉 Edit 💥 Delete 🕜 Apr	oly Transaction 🛛 🥭			Help
Balances	Name	Anount Type	Apply To	Last Run Date	About
Transactions	September Field Trip Fee	ID.00 Orbit	(Tarketta	1/16/2002	User Guide
Billing Rumi					
Billing Plans					
Babb Transactions					

The following actions are available:

- New Opens Batch Transaction to add a new batch transaction to the list
- Edit Opens Batch Transaction to edit the selected batch transaction
- Delete Allows you to delete the selected batch transaction (requires confirmation cannot be undone)
- Apply Transaction Allows you to select the families or students to apply the selected batch transaction. This adds the transactions to the family accounts.

Adding/Editing a Batch Transaction

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

Batch Transact	ion			×
Description	[New Batch Transaction]			
Amount	0			
Apply To	Students 🛛	Transaction Type	Debit 🛛	
Details			<u>_</u>	
			<u>``</u>	
			Save Close	



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

- Description The label for the batch transaction. This is how the transaction will appear when added to each family's account (with student name if applicable).
- Amount Allows you to enter the monetary amount for the batch transaction
- Apply To Sets whether the batch transaction is a per-student transaction or per-family transaction. This determines if the list of families or the list of enrolled students displays when you apply the transaction.
- Transaction Type Options are Debit (charge), Payment, or Credit.
- Details Visible only when editing a batch transaction, this allows you to add notes about the purpose of and uses for this transaction.

Applying a Batch Transaction

Selecting **Apply Transaction** allows the selected batch transaction from the list to be applied to family accounts. Batch Transaction – Apply will open, displaying Description, Amount, and Transaction Type with options to set the Transaction Date and Applies To list of either students or families based on the Apply To setting for the selected batch transaction.

Apply To St				ount \$10.00	ল
ansaction Type De	eoic		ransaction	Date 8/26/2022	
Applies To	Name	Family Name	Grade Level	Supervisor	Apply
Unselect All	Lovejoy, Christi	Lovejoy, Mr. Robert	Sophomore	Friendson, Mr	
1	McMercy, Becky	McMercy, Mr. John a	4th Level	Friendson, Mr	
	McMercy, Bill	McMercy, Mr. John a	Senior	Friendson, Mr	2
	McMercy, Sandy	McMercy, Mr. John a	8th Level	Friendson, Mr	
1	Upright, Reginald	Upright, Mr. Charles	Sophomore	Friendson, Mr	2
	Virtueson, Ace	Virtueson, Mr. David	Junior	Friendson, Mr	
1	Willing, Hudson	Virtueson, Mr. David	1st Level	Content, Miss A	
	I Willing, Judson	Virtueson, Mr. David	1st Level	Content, Miss A	

Enter a **Transaction Date**, select the students or families to apply the transaction to, and click **Apply**. This will add the transaction to the account of each selected family (adding the student's name with the Description if it is an Apply To Students transaction).



Inventory Section

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



Inventory	Shew - Ø Edd	😫 Delete 🖂 Pr	int V 2				Help	her: adre
Orden	PO#	Created On	Created By	Order Status	Suppler	Electronic Status	About Uner G	
Receive Order Brown Drivertory Support Subject Ordering Rules	220923153118	9,000,0002	âden)	Deen	ACC.			
tome								
anlei								
audents								
illing								
minitary								
Reports								
ietup								

The Orders page allows you to create and manage inventory orders. The following actions are available:

- New Allows you to create a new automatic or manual inventory order. Create Order will display with options for your choice (see below).
- Edit Opens Edit Order to manage the selected order
- Delete Allows you to delete the selected order (removes all record of the order from your database, but does not cancel the order with the supplier if transmitted)

Filtering Orders

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



- Include Received Orders (on or off)
- Only one of the following options:
- Past 90 Days
- Past 180 Days
- Past Year
- All Past Orders

The Order Status for all listed orders shows where they are in the process. Orders start in the Open status while being edited. Only open orders can be altered. When editing is completed, orders are marked with a status as Ready To Send. (An order at Ready To Send can be re-opened to make changes, but orders with any other status can no longer be returned to Open.) After this, other statuses signifying the order's state in the process (Printed, Submitted, etc.) appear until the order becomes Received.

Creating an Automatic Order

Automatic ordering adds PACE items to an order by reviewing the academic prescription for the selected students. 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** to manage the inventory of extra PACEs available at your school. Selecting this will add to the order any items needed to bring inventory to the auto-stock level set for each item number in the Inventory > Catalog screen. See <u>page 87</u> for editing auto-stock levels.

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 order processing. This will take you to the Edit Order form with the added items.

Suppler All C		Ship Va Shipping Address Send via Web				
Ladd M Remove				_	_	
tion #	Quelity Name		Unit Munder	Hetal Price	Lest Pace	Total Price
• 7100 LE	1 Crobbetz	99	1101	1.30	1.0	11111 200
7110	1 English 13	10	3340	3.30	2.30	1.30
7111	1 English 11	11	1111	3.30	3.30	3.30
408097	1 World Dec	gradity 1097	3097	3.55	1.50	3.30
408098	1 World Sec	graphy 1098	9298	3.50	3.50	3.50
408099	1 World Sec	graphy 1099	1095	3.50	1.50	3.50
9109	1 Physical St	sence 1329	1329	3.30	3.39	3.30
9110	1 Physical Si	dence 1130	3336	3.30	2.30	1.30
9111	1 Physical St	perice 1111	1111	3,30	5.30	3.30
12097 Unique Theme: 20	1 Muse I Tetal City: 39		1	3,30	2.72	1.30 Ref. Total \$126.90



To complete and submit this order, take the following steps:

- On the **By Students** tab, a line for each individual item on the order will be listed. Items can be removed from the order by selecting a line and using the X for Remove.
- Additional non-PACE items (such as Score Keys, forms, and resource books) can be added to the order. Click the **Add** button to add a line, select the Item # from the dropdown list, and enter the quantity.
- 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.
- Click Ready to Send to prepare the order for submission.

Creating a Manual Order

Manual ordering is for ordering Non-PACE items from A.C.E. or creating an order for materials 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 a line for each item you wish to order. Select **Add** to create a line on the order. Use the down arrow in Item # to select an item from the list. (You can type an item number to jump to it in the list.) If you do not know the item number for an item, use the search button it open "Find Catalog Item," where you can type parts of the name, subject, or Unit (PACE) number to find the catalog item.

	 Editori 	Name	Ont Number	Category	Subject
4		Q key	-	-0	-0.10
Suppler: /	A.C.E.				
40652495	4THEDITION	Biology Key Set 3297-1108		Bobgy	Bology
09297	40+EDITION	Biology Key 2007-2009		Bobgy	Bology
475330	4THEDITION	Biology Key 1330-1302		skology	bology
409303	4THEDITION	Bology Key 1103-1105		Subgy	Sology
409336	4THEDITION	Beilegy Key 1136-1108		Bology	Bology
and the second s		and the second of the second		e	



After choosing the item, enter the quantity desired. After completing the added line, click **Add** to insert a new line. Continue this process, editing each added line until you have completed the order.

To prepare an order for submission, take 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.
- Click **Ready to Send** to prepare the order for submission.

Submitting an Order

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 status of submitted orders is updated periodically at the School Management web portal. Submitted orders can be seen at <u>studentmanage.com</u>. Orders sent with Send Now will also show these status updates in the Electronic Status column:

- Received Order has been received by the Portal website. The Portal reviews each order and if any discontinued items were included, they will be removed and replaced by the equivalent current item when possible. These changes are noted in the Order Status.
- Submitted Order has been submitted to A.C.E. order processing.
- OnHold Order has entered processing by A.C.E. but cannot proceed. Most often, it 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 showing the total cost for the order with a Pay Now option to pay online via credit card. You can also contact A.C.E. Customer Service to make a payment for the order.
- Processing Order is being prepared for shipment.
- InvoicedComplete Order processing is completed. It is either awaiting shipment or has been shipped.



Uploading a Manual Order File

Orders can also be saved as a file to be uploaded later at the Portal website. For an order that is Ready to Send:

- 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 on to the Portal at <u>studentmanage.com</u>.
- Click the **Orders** tab.
- Click Upload Manual Order File.
- Navigate to the order file to select it and click **Upload**. The order will appear in your Recent Orders list.
- The order status is updated periodically in the School Management web portal. Though it will not be visible as Electronic Status in the software, the status history can be seen by going to <u>studentmanage.com</u>. (See <u>Submitting an Order</u> above for more on these statuses.)

Editing an Order

You can select any order and click **Edit** to open Edit Order. This will allow you to see more details about the order.

Only orders with Open as the order status can be edited. (A "ReadyToSend" order can be "reopened," but all others will be display only.) Orders submitted using Send Now will show more detailed order status updates. (Example: Orders showing an electronic status of InvoicedComplete may show a tracking number for a shipped 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 contact the supplier to cancel any orders. 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 page 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 page allows you to see current inventory items that have been ordered or received as In Stock. Note that items already issued to students are not displayed, since they are in the possession of the student rather than the school.

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	✓ D +			
Item Number				
Quantity	1 😜			
Assigned Student				
	Save Done			

To add to your inventory using this form:

- Use the down arrow for Item to select an item from the list. (You can type an item number to jump to it in the list.) If you do not know the item number for an item, use the search button
 to open "Find Catalog Item." If the item you are adding to inventory is a new catalog item from another supplier, click states to add the details of the new item to your school's catalog.
- 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.
- When you are finished adding inventory, click **Done** to close the form.



Issuing PACE Inventory

Though more common to issue from the PACE score boxes on Progress Control (see <u>page 54</u>), PACE items with a student name in the Assigned Student column and the PACE on the current year's Progress Control can be issued by selecting the line and clicking **Issue**. With the PACE in the possession of the student, it will no longer appear in Browse Inventory.

Assigning Inventory

To assign an inventory item to a student, select any item that does not have Assigned Student and click **Assign**. You will then be given the option to select a student. Assignments can only be made to a student with that PACE on the Progress Control of the current year.

Unassigning and Reassigning Inventory

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

To reassign an inventory item to a different student, select any assigned item and click **Reassign** to both remove the student name and let you select another to put in its place. The Select Person form will be displayed, allowing you to choose the student you wish to reassign the item to.

Changing Inventory Status

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

Suppliers

To add items to track using Inventory settings, another supplier must be added to the Suppliers page. The following actions are available to manage suppliers:

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

- New Displays the Add New Supplier form to add an entry to the page. Enter values as needed (only Name is required) and click **Save**.
- Edit Select a line and click **Edit** to open Edit Supplier to change information for the supplier. (A.C.E. opens only for display, as it cannot be edited.)
- Delete Click the supplier you wish to delete and click **Delete** (unavailable for A.C.E.).



Catalog

Select **Catalog** to view and manage catalog items in School Management. Text boxes below each column heading allow you to type to find items. Entered text filters the catalog list to show only items that match any part of the text entered. You can enter values in multiple text boxes to filter the result as much as desired. The following actions are also available:

- Manual Update This option is used to manually update the catalog using a downloaded catalog file. To get the file, log in to the Portal at <u>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 A.C.E. items in your catalog.
- New Adds an item from a supplier other than A.C.E. to the catalog. The Catalog Item form displays for you to enter information for the new item. Click **Save** to add the entered item.
- Edit Allows you to edit a catalog item. Only catalog items that have been added can be edited.
- Delete Allows you to delete a catalog item. Only added items from a supplier other than A.C.E. 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. By default, all subjects are set to (auto) to order the latest edition printed PACEs for the subject. To modify the Preferred Edition, select a new value from the dropdown list and click **Save**.



Reports Section

The Reports menu displays a listing of all the reports in the system, sorted by category.

Reports	S Gragory: Academic Records	2	Help
Droves Reports	Academic Protection Report	Lists academic projection towards graduation	About
	High School Transcript	Lists high school student subjects, PACEs, averages, and credits by	Uner Guide
	High School Transcript By Subject	Lists high school student subjects, PACEs, averages, and credits by	
	Permanent Record	Lists student subjects, PACEs, and averages by school year	
	Category: Academic Reports		
	ABCs Progress Report	Prints Progress Reports for students in the ABCs program	
	Congratulations Sig	Prints Congratulations sips for the current day, the current week,	
	Goal Check Report	Prints Goal Check Report data for the current week, the previous w	
	tionework Assement	Prints all or only unprinted Homework Assignment sips for a date	
	Kindenaarten Progress Report	Prints Progress Reports for students in the kindergarten program	
	Phileon Status Report	Lists the privlege status for students	
	Shudent PACE Averages Report	Student PACE Averages Report	
	Student Progress Report	Prints all or individual Progress Reports by academic period	
	Student Standardized Tests	Lists standardured test and college entrance examinesuits for each	
	Supervisor's Progress Report	Reports all date displayed in Progress Control	
	Category: Biling Reports		
	Balance Report	Lists balance for each family on the current date	
	Statement	Prints monthly statements for an individual family or all families	
	Transaction Report	Provides a detailed report of all financial transactions for each famil	
	Category: Family Reports		
- wrec	Earrily Address Labels	Prints malling labels for all families	
Sector .	Early Report	Lists contact information for each family	
ankei	Category: Inventory Reports		
tudents	Inventory Report	Provides an alphabetical listing of all PACEs currently in stock	
Ing	Order Report	Lists all items in a specific order	
1000	Order Report By Student	Lists all tiens by student	
wentory	EACE Order Labels	Prints labels for PACEs received in a specific order	
	Category: School Reports		
etup	Field Service Representative Report	Provides report to present to Field Service Representative at annu	
1960	8.1. 18.7.	a a ser a ser a ser a ser a ser a ser 🖬	

To run a report, click the report name and the report to open the report Preview window. While some reports display right away, most reports show a Parameter panel for you to select the desired parameters for the report. Make your selection and click **Submit** to run the report.

When the report is displayed, 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 > Exit.



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 dropdown 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 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 2.0

Released Version: 2.0

Date: 9/2022

Transition SMS Server foundation from Microsoft® SQL Server 2012 Express to Microsoft® SQL Server 2019 Express

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 an Order Report by Student 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