



# **ProgressBook StudentInformation Getting Started Guide**



*StudentInformation*

# **ProgressBook StudentInformation Getting Started Guide**

(This document is current for v21.1.1.0 or later.)

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# Change Log

The following Change Log explains by Product Version, Heading, Page, and Reason where changes in the *ProgressBook StudentInformation Getting Started Guide* have been made.

Product Version	Heading	Page	Reason
N/A	<i>"Maintain Ad-Hoc Memberships"</i>	18	Added note that ad-hoc memberships should be created at the building level.
21.1.0	<i>"Select Students"</i>	5	Updated screenshots and text for display of the pronunciation of a student's name, if saved in the student's profile and added a note regarding the display of family group information on the View Profile screen.
20.0.0	<i>"Run Standard Reports"</i>	23	Added note regarding the deletion of load settings.
19.2.0	<i>"Run Quick Reports"</i>	27	Updated text to reflect change from <b>Ad Hoc Reports</b> to <b>Report Designer</b> .

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# Welcome to StudentInformation

StudentInformation is a database application that lets you collect, store, and manage all “permanent record” information about the students in your district. This includes information about medical alerts, custody, parent/guardian contacts, fees, lockers, homerooms, discipline, attendance, scheduling, assessments, graduation verification, and marks. In addition, you can post calendars, links, and announcements for your staff. Finally, StudentInformation helps you comply with your state’s reporting requirements.

You can assign different levels of security to users based on their job requirements. For example, you decide if each role (such as administrative personnel, guidance counselors, teachers, and secretaries) can only view data or if they can also add, change, and delete data within the entire application or on a specific screen.

**Note:** For an explanation of the graphics and functionality used throughout the application, see *ProgressBook StudentInformation Quick Reference*.

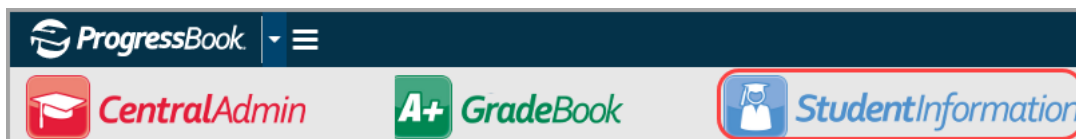
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## Access StudentInformation

There are two ways to access StudentInformation:

- If you are already signed in to another ProgressBook application, on the banner, beside the application’s logo, click the application quick launch icon, and then click **StudentInformation**.

StudentInformation opens in a new window or tab, depending on your browser settings.



- If you are not already signed in to ProgressBook, or if your district provides stand-alone access to StudentInformation via a URL, you must sign in. See [“Sign In to StudentInformation.”](#)

## Sign In to StudentInformation

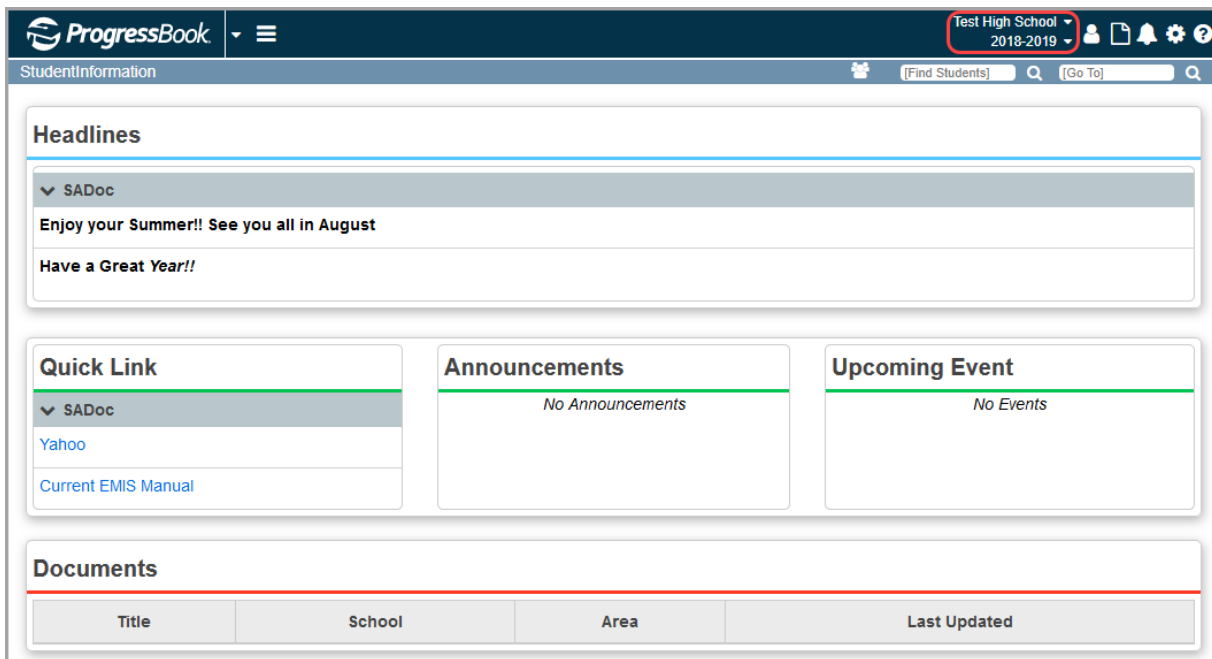
Access StudentInformation by signing in from the **ProgressBook CentralAdmin sign in** screen.

1. In a web browser, enter the URL provided by your district.  
The ProgressBook CentralAdmin sign in screen displays.



2. Select your **Domain**, and then enter your **Username** and **Password**.
3. Click **Sign In**.

The main **StudentInformation** screen displays. The working school and year you are viewing display in the banner. To change the working school and/or year, see [“Change Working School and Year.”](#)



Title	School	Area	Last Updated
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## Sign Out of StudentInformation

To prevent unauthorized use, ProgressBook automatically signs you out after a period of inactivity, the length of which is defined by your system administrator. The timer calculating inactivity is reset each time you perform an activity anywhere in the ProgressBook suite.

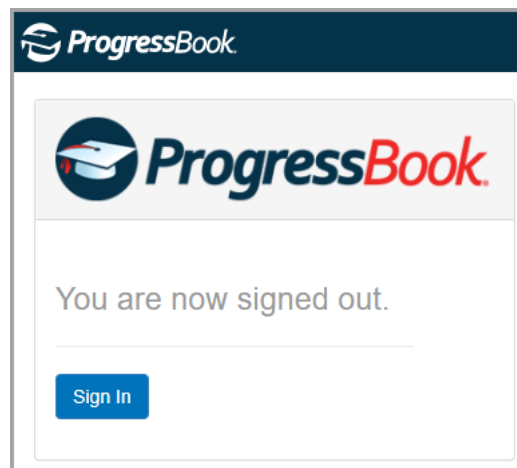
**Note:** *Ensure that you save your changes frequently. If you are signed out due to inactivity, your changes are not saved.*

You should manually sign out of StudentInformation if you plan to leave your computer unattended for any length of time in which someone might have access to it. To sign out, in the banner, click

 and select **Sign out**.



The CentralAdmin sign out screen displays, confirming that you are signed out of the ProgressBook suite.



## Navigate StudentInformation

StudentInformation provides navigation options to help you move around in the application. There are several ways to find a screen, report, or student. You can also change the working school and school year you want to view.

- To change the working school or school year, see [“Change Working School and Year.”](#)
- To select students, see [“Select Students.”](#)
- To find a screen or report, see [“Search for Screens.”](#)


## Change Working School and Year

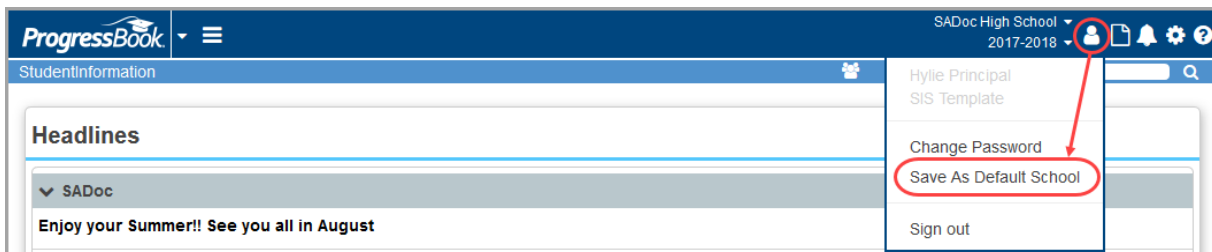
The school and school year whose information you are currently viewing display in the banner on every screen. You can change the working school and/or year.

1. On any screen, in the appropriate drop-down list, select a new working school or school year.

**Note:** If you change the working school year to a year that is not typical for a certain screen (for example, a past or future school year on a screen typically used to enter current year information), a warning message displays beneath the breadcrumb bar.



2. (Optional) To have the working school selected by default each time you sign in to StudentInformation, click  and select **Save As Default School**.



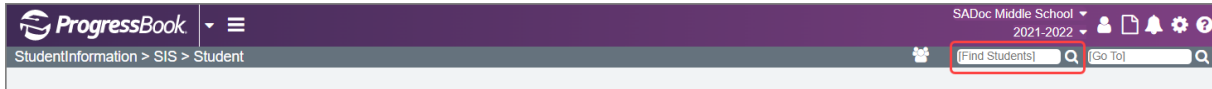



## Select Students

Before you can see student-specific information on any screen, you first need to select a student.

1. Search for the student using one of the following methods:

- **Find Students** field – Lets you search for an individual student record.




- Enter your search criteria. (For details on valid student search methods, see the *ProgressBook StudentInformation Quick Reference Card*.)
  - Click  or press ENTER.
- **Advanced Student Search** (school year in context) – Lets you perform more complex searches using multiple criteria. You can also select a group of students and scroll through their information one by one.

- Click .

The **Advanced Student Search** screen displays.

- Enter your search criteria on any/all of the first four tabs to search for students within the current school year in context:
  - **General Info** – Demographic information search fields; if you select the checkbox beside field names, the search will look for names or cities starting with the letters you entered.
  - **Additional Info** – Additional demographic information search fields.
  - **Miscellaneous Info** – Additional search fields that vary by state.

- **Course Section Info** – Course section search fields; click  to browse for the course section.
- **Search All Years** tab – This tab functions separately from the rest. See [“Search for Students Across All Years.”](#)










iii. Click **Search**.

The **Student Search Results** screen displays a list of all students matching your search criteria.

**Student Search Results**


This screen displays student search results and allows you to select a student

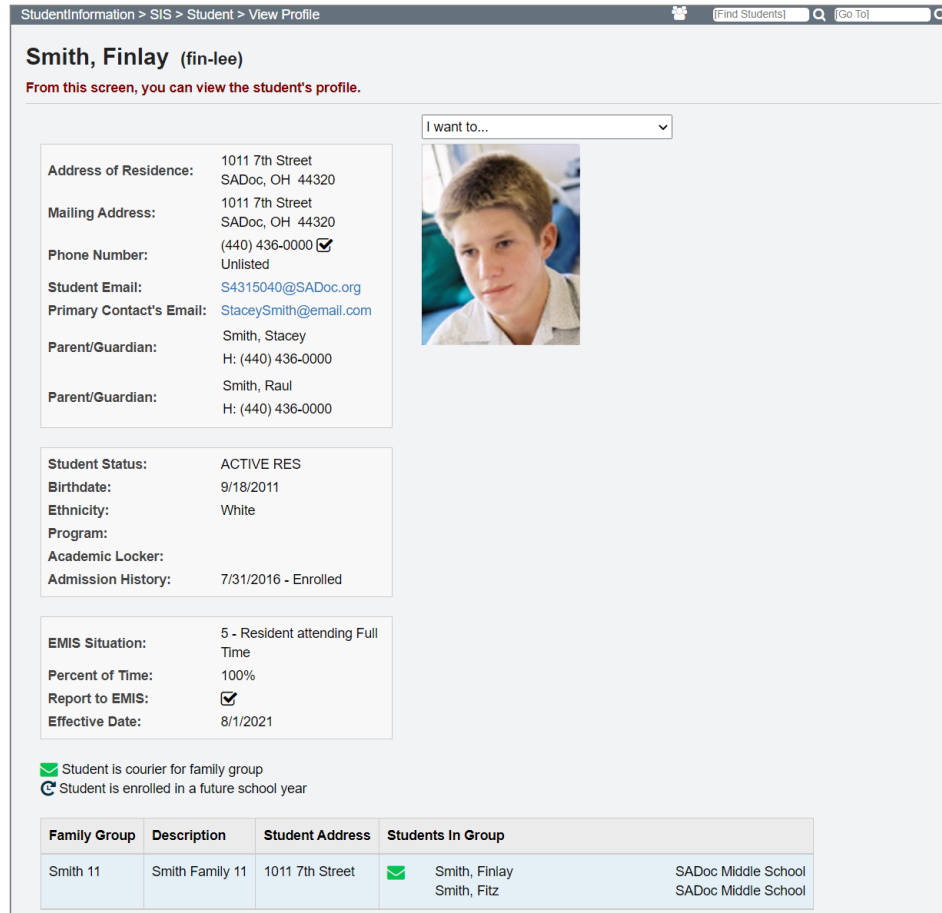
10 Records Found

1.	<b>Smith, Fala</b>  SADoc Middle School Birthdate: Jul 01, 2011	ID: 04306019 Gender: F Grade: 5	Counselor: Intervention, David M Homeroom: DOMS248 Status: A <span style="color: green;">\$</span>
2.	<b>Smith, Fallon</b>  SADoc Middle School Birthdate: Apr 17, 2011	ID: 04306014 Gender: F Grade: 5	Counselor: Intervention, David M Homeroom: DOMS243 Status: A <span style="color: green;">\$</span>
3.	<b>Smith, Fannie</b>  SADoc Middle School Birthdate: Jul 16, 2011	ID: 04306020 Gender: F Grade: 5	Counselor: Intervention, David M Homeroom: DOMS249 Status: A <span style="color: green;">\$</span>
4.	<b>Smith, Fayme</b>  SADoc Middle School Birthdate: Jun 16, 2011	ID: 04306018 Gender: F Grade: 5	Counselor: Intervention, David M Homeroom: DOMS247 Status: A <span style="color: green;">\$</span>
5.	<b>Smith, Felcia</b>  SADoc Middle School Birthdate: May 02, 2011	ID: 04306015 Gender: F Grade: 5	Counselor: Intervention, David M Homeroom: DOMS244 Status: A <span style="color: green;">\$</span>
6.	<b>Smith, Finlay</b>  SADoc Middle School Birthdate: Sep 18, 2011	ID: 04306011 Gender: M Grade: 5	Counselor: Intervention, David M Homeroom: DOMS240 Status: A <span style="color: green;">\$</span>
7.	<b>Smith, Fitz</b>  SADoc Middle School Birthdate: Oct 03, 2011	ID: 04306012 Gender: M Grade: 5	Counselor: Intervention, David M Homeroom: DOMS241 Status: A <span style="color: green;">\$</span>
8.	<b>Smith, Flip</b>  SADoc Middle School Birthdate: Oct 18, 2011	ID: 04306013 Gender: M Grade: 5	Counselor: Intervention, David M Homeroom: DOMS242 Status: A <span style="color: green;">\$</span>
9.	<b>Smith, Franchesca</b>  SADoc Middle School Birthdate: Jun 01, 2011	ID: 04306017 Gender: F Grade: 5	Counselor: Intervention, David M Homeroom: DOMS246 Status: A <span style="color: green;">\$</span>
10.	<b>Smith, Frost</b>  SADoc Middle School Birthdate: May 17, 2011	ID: 04306016 Gender: F Grade: 5	Counselor: Intervention, David M Homeroom: DOMS245 Status: A <span style="color: green;">\$</span>

10 Records Found

2. From this screen, choose one of the following options:

- To open the profile of a student in the list, beside the student's name, click  .  
The student's profile opens.



StudentInformation > SIS > Student > View Profile

Smith, Finlay (fin-lee)

From this screen, you can view the student's profile.

I want to...

Address of Residence: 1011 7th Street  
SADoc, OH 44320

Mailing Address: 1011 7th Street  
SADoc, OH 44320

Phone Number: (440) 436-0000   
Unlisted

Student Email: S4315040@SADoc.org

Primary Contact's Email: StaceySmith@email.com

Parent/Guardian: Smith, Stacey  
H: (440) 436-0000

Parent/Guardian: Smith, Raul  
H: (440) 436-0000

Student Status: ACTIVE RES

Birthdate: 9/18/2011

Ethnicity: White

Program:

Academic Locker:

Admission History: 7/31/2016 - Enrolled

EMIS Situation: 5 - Resident attending Full Time

Percent of Time: 100%

Report to EMIS:

Effective Date: 8/1/2021


Student is courier for family group  
 Student is enrolled in a future school year

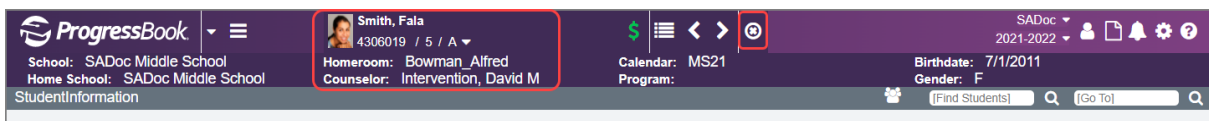
Family Group	Description	Student Address	Students In Group
Smith 11	Smith Family 11	1011 7th Street	<input checked="" type="checkbox"/> Smith, Finlay Smith, Fitz

**Note:** Pronunciation information displays for the student's name if it has been entered in the student's profile.

**Note:** Whether Family Group information is displayed is controlled by your district.

- To select a student and return to the screen from which you started the search, click the student's name.  
The student is now selected in the banner, and you can navigate to another screen with the selected student.

**Note:** This is also referred to as having the student in context. To remove a student from context, click .



ProgressBook

School: SADoc Middle School  
Home School: SADoc Middle School  
StudentInformation

Smith, Fala  
4306019 / 5 / A

Homeroom: Bowman, Alfred  
Counselor: Intervention, David M




Calendar: MS21  
Program:

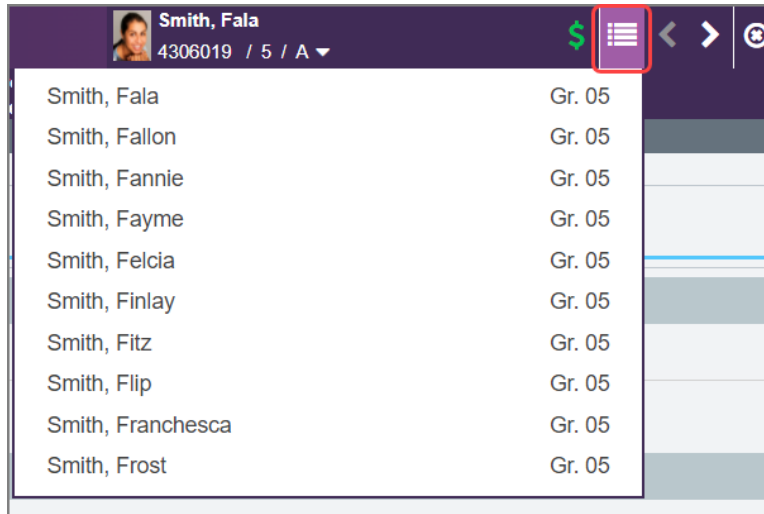
SADoc  
2021-2022

Birthdate: 7/1/2011  
Gender: F

[Find Students] [Go To]

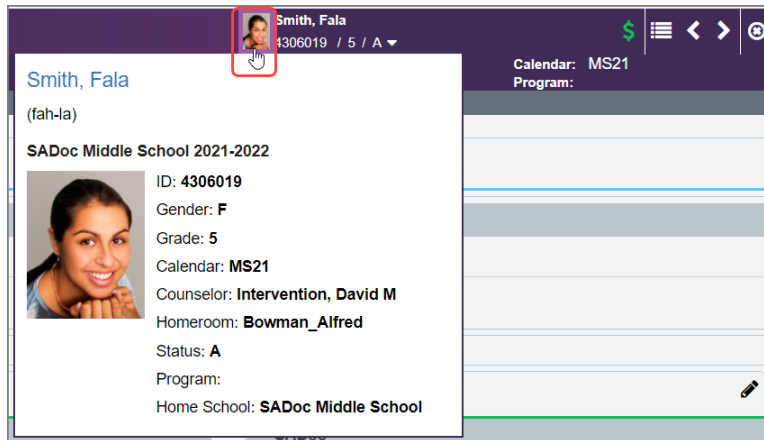
3. (Optional) From any screen with the student selected, you can view the other students matching your search criteria using the following options:

- To scroll backward and forward through your search results, use  and .
- To open a drop-down list of your search results, click , and click another student's name.



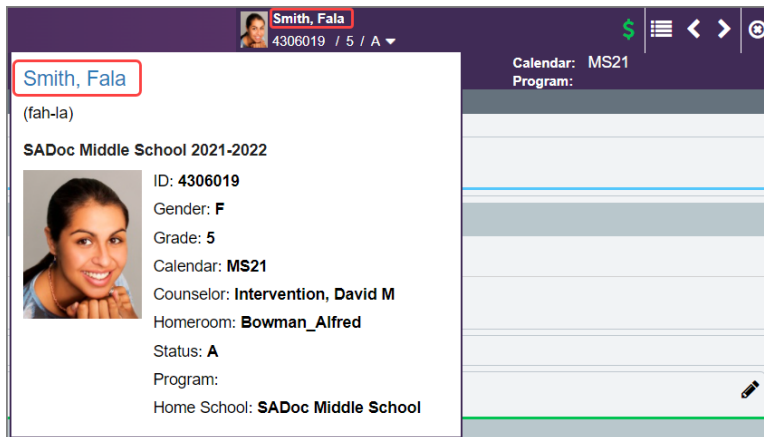
4. (Optional) To view a summary of the student's profile information and a larger photo, in the student in context area, click the thumbnail photo.

An info box displays the summarized profile information and larger photo.



**Note:** Pronunciation information displays for the student's name if it has been entered in the student's profile.

5. (Optional) To open the full student profile, click the student name link in either the student in context area or the summary profile area.

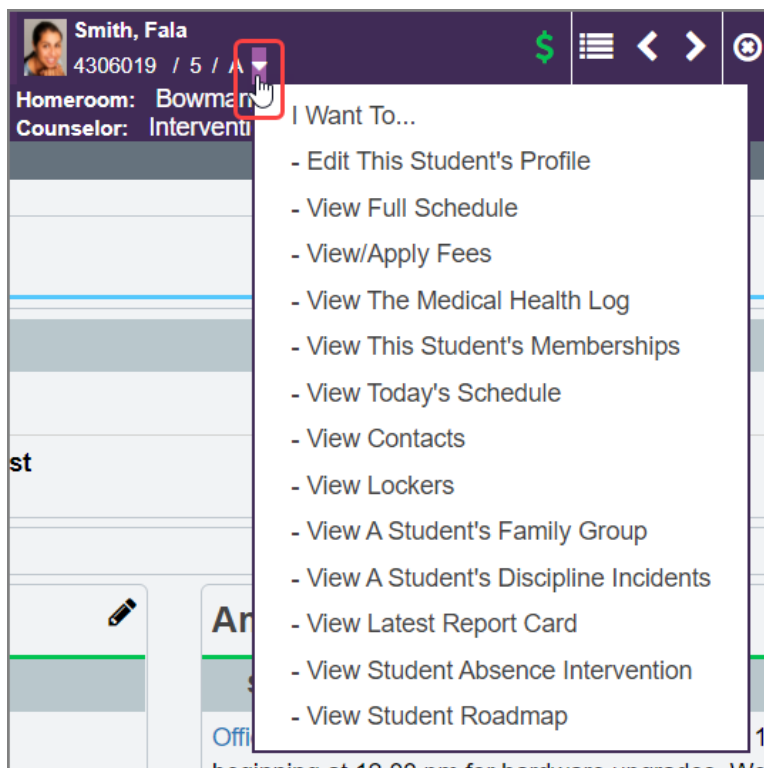


6. (Optional) To view additional detailed information about the student:

- a. Click .

The **I Want To...** menu opens.


- b. Click the desired option to view details for the selected student photo.



## Search for Students Across All Years

On the **Advanced Student Search** screen, you can also search for students across all school years, including students who have graduated.



1. Click .
- The **Advanced Student Search** screen displays.
2. Click the **Search All Years** tab.

StudentInformation > SIS > Advanced Student Search

### Advanced Student Search

Using these tabs, specify as many criteria as you wish to limit your search.  
To search with partial data for a field click the check-box next to that field.

General Info   Additional Info   Miscellaneous Info   Course Section Info   **Search All Years**

The **Search All Years** tab does not include search parameters from the other four tabs in its search.

Last Name:     Middle Name:    
First Name:     Called Name:    
Social Security:    Birthdate:  /  /   
State Student Id:    EMIS Id:   
Sort By:   ASC  DESC

**Search this school only**

3. Enter your search criteria on any/all of the fields in this tab.
  - If you select the checkbox beside field names, the search will look for names starting with the letters you entered.
  - If you wish to expand the search to all buildings in a district, deselect the **Search this school only** checkbox.

**Note:** The **Search All Years** tab does not include search parameters from the other four tabs in the search.

4. Click **Search**.

The search results grid displays a listing of all students matching your search criteria.

**Caution:** Selecting a student may change the school year in context.

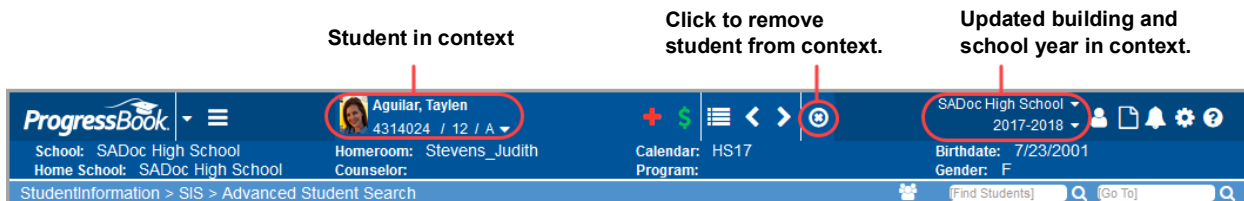
Student Number	Student Name	School	Grade	Homeroom	Student Status	School Year
1234567	Bell, Amy/305025	ASHLAND HIGH SCHOOL				2002-2003
1234567	Bell, Carrie/202009	ASHLAND HIGH SCHOOL				2002-2003
1234567	Bell, Daniel/202010	ASHLAND HIGH SCHOOL				2002-2003
1234567	Bell, Gabriel	ASHLAND HIGH SCHOOL	12	9-164	A	2008-2009
1234567	Bell, Kyle/248007	ASHLAND HIGH SCHOOL				2003-2004
1234567	Bell, Tracy	ASHLAND HIGH SCHOOL	12	7-201	A	2016-2017
1234567	Bell, Melissa	ASHLAND HIGH SCHOOL	12	5-118	A	2014-2015
1234567	Bell, Michael	ASHLAND HIGH SCHOOL	12	4-211	A	2013-2014

- From this grid, you may put a student and their building in context by clicking on their name.

**Note:** If the student's last active school year is not the current year in context, when you click on a student, the school year in context changes to the last school year in which the student was active.


**Note:** If the student's last active school is not the school in context, when you click on a student, the school in context changes to the last school in which the student was active.

The student, year, and school display in context.



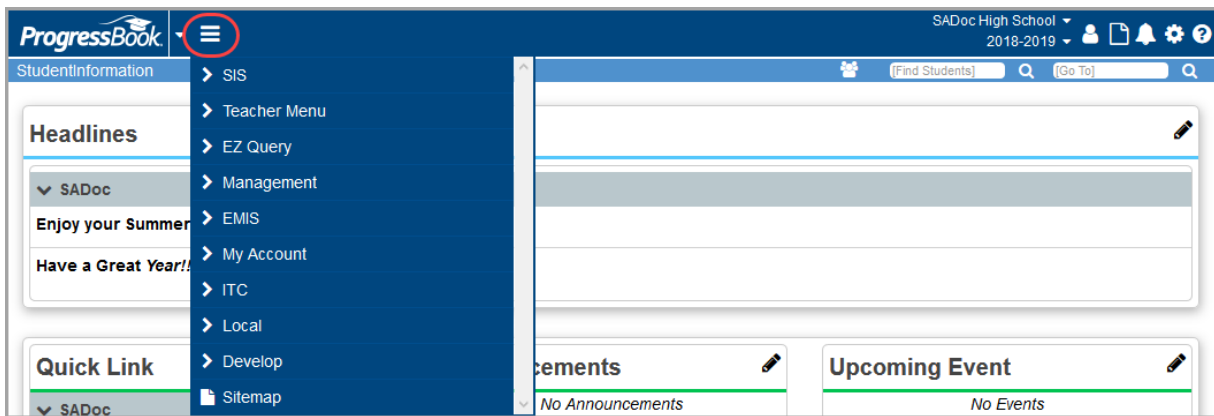
## Search for Screens

There are several options to help you navigate to the screen or report you want to access in StudentInformation:

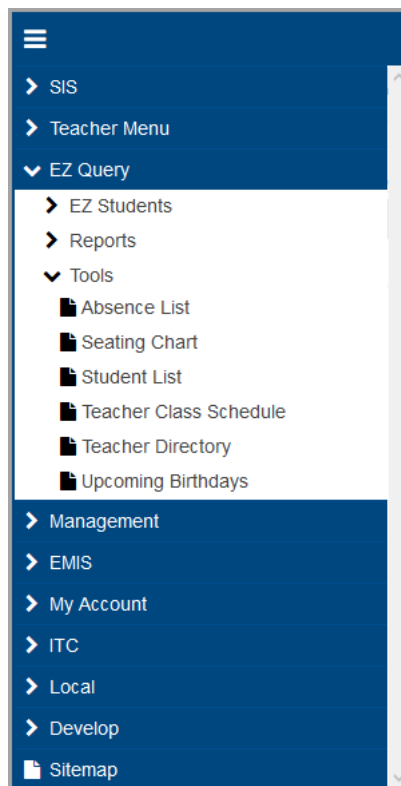
- **Menu** – At the top of every screen, the menu contains several options to help you navigate to a screen.
  - To open the menu, click .

The menu opens, displaying additional submenu items.

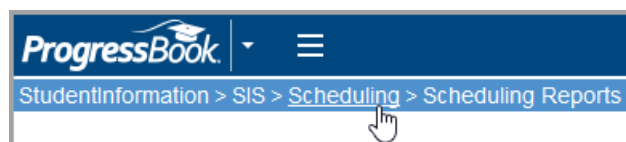
**Note:** The menu options that display are based on your StudentInformation security permissions.




b. Click to expand the appropriate section(s) until you reach the correct screen.



- **Breadcrumb Trail** – A breadcrumb trail displays on every screen to help you track your location within StudentInformation. The breadcrumbs are clickable links. Click any breadcrumb to go directly to that screen.



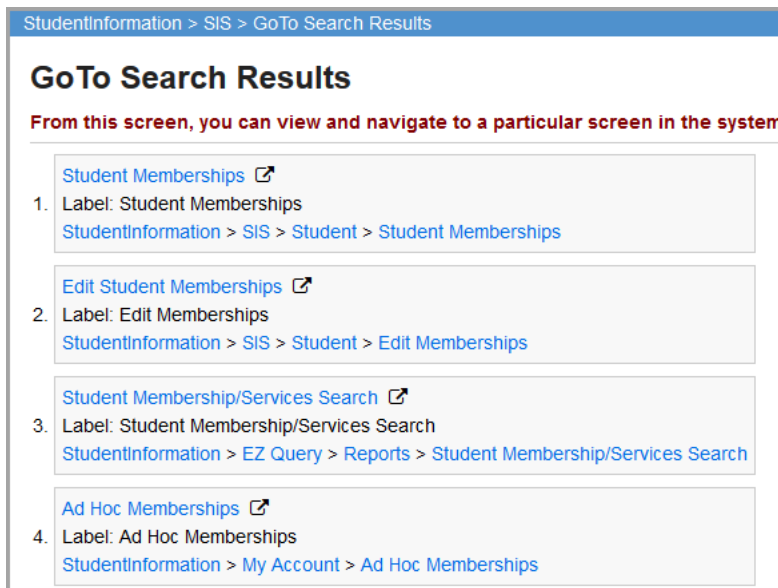


- **Go To** field – When you are unsure of the path to a screen, use the **Go To** field on the right side of the breadcrumb bar to search for the screen.
  - a. Type in the name of the screen.
  - b. Click  or press ENTER.

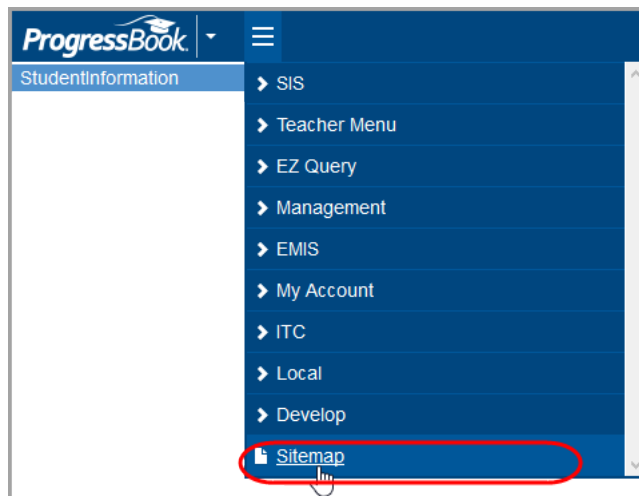


A list of all of screens and reports matching your search term displays.

- c. Click a link to go directly to that screen.

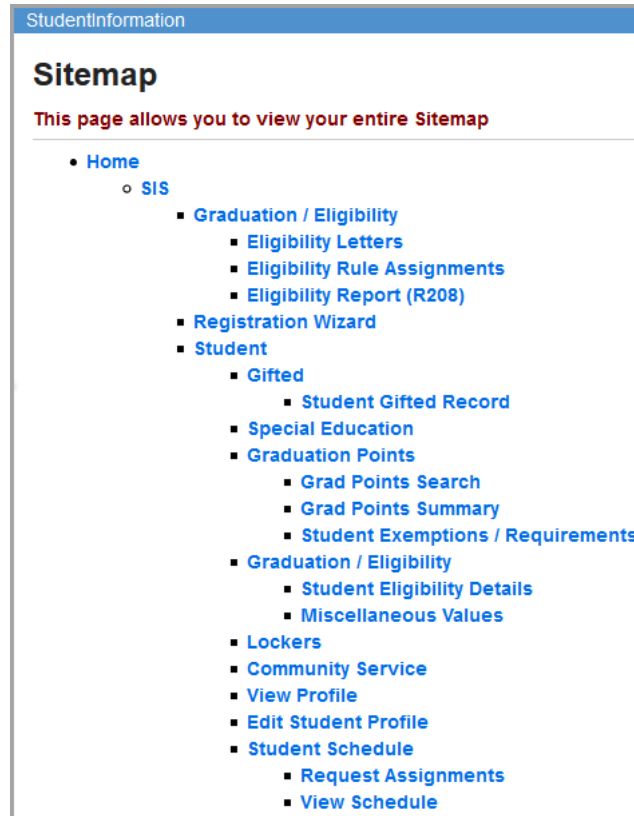


- **Sitemap** – The sitemap lists every screen in the application to which you have access (per your security setup) organized by menu and submenu.
  - a. On the menu, click **Sitemap**.




The **Sitemap** screen displays.

- b. Click a link to go directly to that screen.

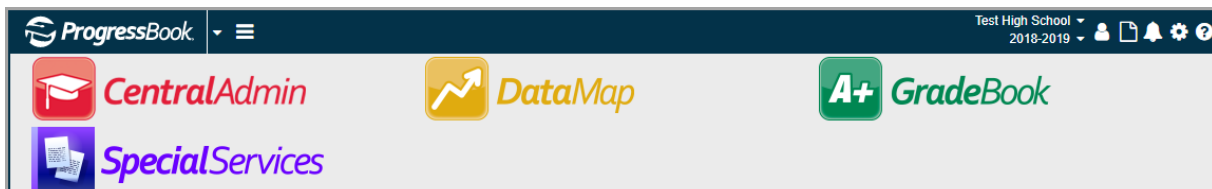


## Navigate ProgressBook

Use the application quick launch to navigate between ProgressBook applications that you are authorized to use.

1. On the banner, to the right of the ProgressBook logo, click  to open the application quick launch area.

Logos display for all of your other registered ProgressBook applications.



2. Click an application's logo.

The application opens in another window or tab, depending on your browser's settings.

# Account Settings

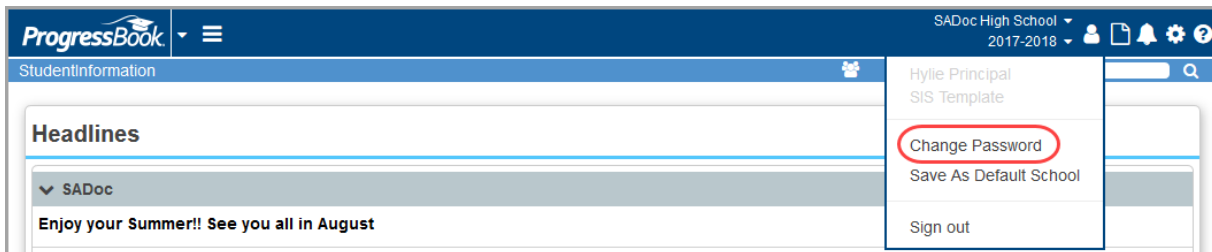
You can maintain your account settings using the options on the **My Account** menu.

- To change your password, see [“Change Your Password.”](#)
- To set up your select schools for the **Portal** and **EZ Query**, see [“Select Schools.”](#)

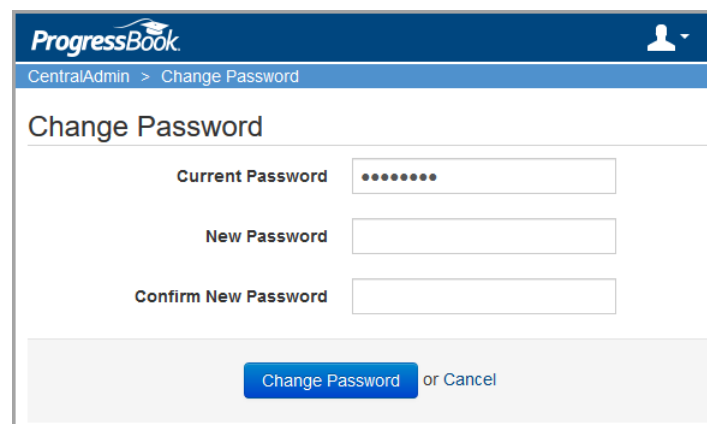
## Change Your Password

**Note:** Your ProgressBook account credentials are the same for all applications in the suite. If you change your password in StudentInformation, you change it for all ProgressBook applications.

1. On the banner, click  and select **Change Password**.



The CentralAdmin **Change Password** screen displays.


 A screenshot of the CentralAdmin Change Password screen. The page title is 'Change Password'. It features three input fields: 'Current Password' (with masked characters), 'New Password', and 'Confirm New Password'. At the bottom, there are two buttons: 'Change Password' and 'Cancel'.

2. Enter your **Current Password** and a **New Password**.
3. In the **Confirm New Password** field, re-enter your new password.
4. Click **Change Password**.

## Select Schools

### Navigation: StudentInformation > My Account > Select Schools

As part of your account settings, you can set one or more “select schools” that you want to see on the StudentInformation **Portal** and in **EZ Query**.

1. On the **Select Schools** screen, select the checkbox beside each school you want to designate a “select school.” To select all schools in the list, click **Mark All Selected**.

The screenshot shows the 'Select Schools' interface. At the top, there is a breadcrumb trail: 'StudentInformation > My Account > Select Schools'. Below this is the title 'Select Schools' and a red instruction: 'Select the schools you wish to work with during this session'. There are two radio buttons: 'This session only' (selected) and 'Save permanently'. Below these are two buttons: 'Mark All Selected' and 'Mark All Unselected'. A list of schools follows, each with a checkbox: SADoc, SADoc Elementary School, SADoc High School (checked), SADoc Middle School, SASales, SASales Elementary School, SASales High School, SASales Middle School, SASupport, SASupport Elementary School, SASupport High School, SASupport Middle School, SATraining1, SATraining1 Elementary School, SATraining1 High School, and SATraining1 Middle School. At the bottom is a blue 'Select' button.

2. (Optional) To retain these select schools each time you sign in to StudentInformation, select the **Save permanently** option.
3. Click **Select**.




# Common Functionality

This section explains common functionality found throughout StudentInformation.

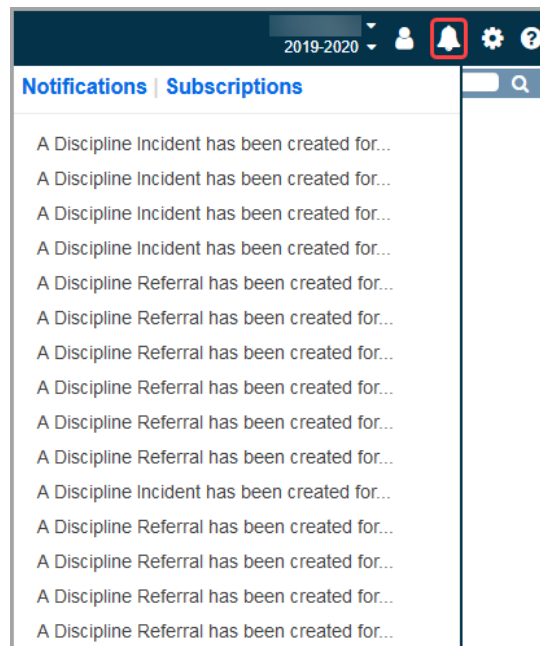
- To view notifications, see [“View Notifications.”](#)
- To maintain ad-hoc memberships, see [“Maintain Ad-Hoc Memberships.”](#)
- To reactivate records, see [“Reactivate Records.”](#)
- To run reports, see [“Run Reports.”](#)
- To run batch jobs, see [“Run Batch Jobs.”](#)
- To understand how StudentInformation standardizes and verifies addresses, see [“Understand Address Standardization and Verification.”](#)

## View Notifications

Depending on your district’s and building’s configurations, you may receive notifications for key events and/or be able to subscribe to them. For more information regarding notifications, see the *ProgressBook StudentInformation Notifications Guide*.

The StudentInformation and GradeBook banner display  for notifications. Whenever you receive a new notification,  displays instead. You can click  to view the 15 most recent notifications.

**Note:** Notifications older than 30 days do not display in this list.



To see a list of all notifications you have received in the last 30 days, click **Notifications**.

To manage your subscriptions to certain notifications, click **Subscriptions**.

## Maintain Ad-Hoc Memberships

You can define students that you want to process as a single group using ad-hoc memberships. The reasons for grouping students include the following: reporting and filtering purposes; sports eligibility purposes; to mass update building progress tracks during the student promotion process; if your school is a JVS that wants to group students by home school for reporting purposes; or if your district wants to perform school-level updates.

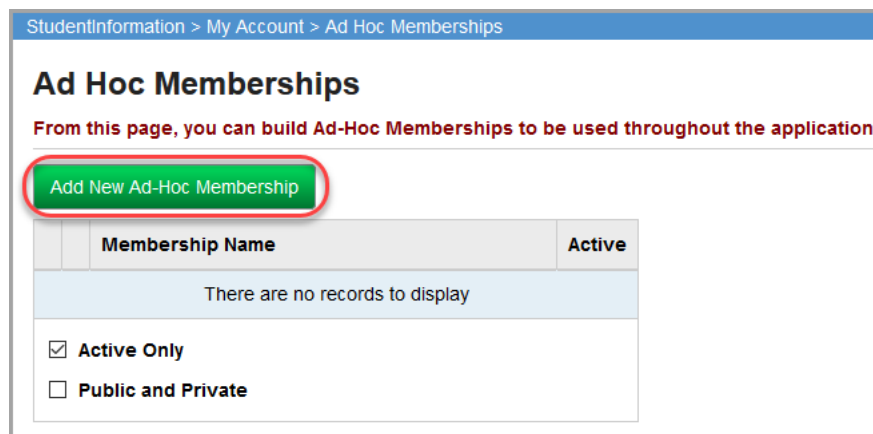
- For information on setting up ad-hoc memberships, see [“Set Up Ad-Hoc Memberships.”](#)
- For information on editing ad-hoc memberships, see [“Edit Ad-Hoc Memberships.”](#)

**Note:** The ad-hoc memberships should be created at the building level and only include students for that specific building.

## Set Up Ad-Hoc Memberships

**Navigation:** StudentInformation > My Account > Ad Hoc Memberships

1. On the **Ad Hoc Memberships** screen, click **Add New Ad-Hoc Membership**.



The screen displays in add mode.

2. Enter a name for the membership in the **Membership Name** field. It is recommended that you include the building code or name.
3. (Optional) To make the membership you are creating inactive, deselect the **Active** checkbox.
4. (Optional) To make this membership available to other uses, deselect the **Make Private** checkbox.
5. Search for students to add to this ad-hoc membership:
  - a. Select any or all of the following **Search Mode** options:
    - **Search Criteria** – Use as many fields as necessary on the **General Info**, **Additional Info**, **Miscellaneous Info**, **Course Section Info**, and **Assessment Info** tabs to find students.


***Note:** Select the checkbox after any field to perform a wildcard search on the contents of that field.*

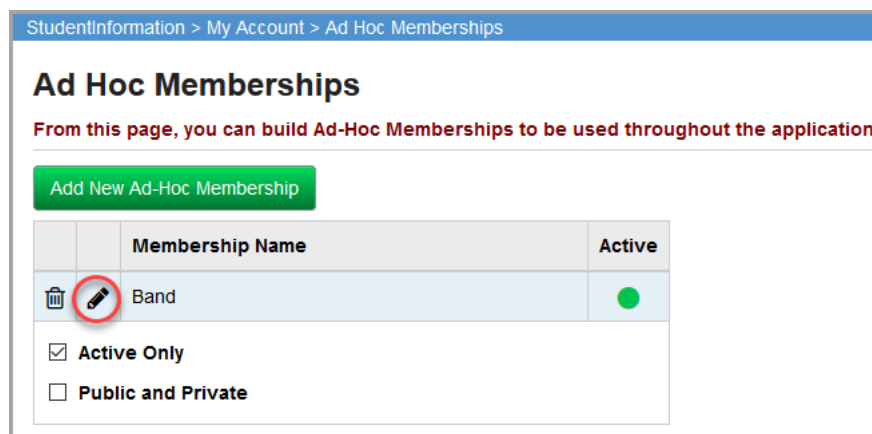
- **Student IDs** – Enter student ID numbers separated by commas.
- **Use Existing Memberships** – Select students from one or more existing memberships to assign to the new membership; move the appropriate memberships from the **Membership** multi-select list on the left to the one on the right, and then select one of the following **Combine Using Logic** options:

- **Use All Students Belonging to Any Selected Membership** – Includes any student who is a member of any of the memberships listed in the multi-select list on the right (“or” match).
  - **Use Only Students Belonging to All Selected Memberships** – Includes only students who are members of all memberships listed in the multi-select list on the right (“and” match).
- b. (Optional) To change whether students returned in the search are initially selected for inclusion in the membership, select or deselect the **Students Selected by Default** checkbox.
  - c. Click **Search**.
6. Review the matching students. If necessary, select the checkbox beside a student to include the student in the membership. Or, deselect the checkbox to exclude the student.
  7. To add the selected students to the membership, select **Add to Membership**. Or, to replace the existing membership group with the selected students, select **Replace Membership**.
  8. Click **Add Selected Students**.  
A confirmation displays the number of students added to the membership.
  9. If this is the only membership you want to add, click **Save**. If you want to add another membership, click **Save and New**, and repeat the procedure.

## Edit Ad-Hoc Memberships

**Navigation: StudentInformation > My Account > Ad Hoc Memberships**

1. On the **Ad Hoc Memberships** screen, in the row of the ad-hoc membership you want to edit, click  .





The screen displays in edit mode.

















StudentInformation > My Account > Ad Hoc Memberships

## Ad Hoc Memberships

From this page, you can build Ad-Hoc Memberships to be used throughout the application.


Membership Name:  Active:  Make Private:

[\[ Hide Existing Students \]](#)

	Student Number	Student Name	Grade	Homeroom	Status	School (IRN)
	04304027	Adkins, Arpad	12th Grade	Coleman_Patrick	A	SADoc High School(300433)
	04313027	Blake, Lily	12th Grade	Coleman_Patrick	A	SADoc High School(300433)
	04303023	Bowen, Ilana	12th Grade	Wood_Dennis	A	SADoc High School(300433)
	04304024	Cross, Abriel	12th Grade	Barnes_Amanda	A	SADoc High School(300433)
	04313021	Curry, Lucius	12th Grade	Price_Jerry	A	SADoc High School(300433)
	04310024	Dennis, Coleman	12th Grade	Barnes_Amanda	A	SADoc High School(300433)
	04315026	Erickson, Wells	12th Grade	Henderson_Stephanie	A	SADoc High School(300433)
	04312024	Farmer, Odessa	12th Grade	Barnes_Amanda	A	SADoc High School(300433)
	04307030	French, Perri	12th Grade	Powell_Christine	A	SADoc High School(300433)
	04304029	Gill, Aaliyah	12th Grade	Perry_Peter	A	SADoc High School(300433)
	04310025	Higgins, Clancy	12th Grade	Ross_Walter	A	SADoc High School(300433)
	04309026	Joseph, Brina	12th Grade	Henderson_Stephanie	A	SADoc High School(300433)
	04311021	Love, Jett	12th Grade	Price_Jerry	A	SADoc High School(300433)
	04312027	Quinn, Oakley	12th Grade	Coleman_Patrick	A	SADoc High School(300433)
	04312025	Reese, Olranda	12th Grade	Ross_Walter	A	SADoc High School(300433)
	04314022	Schneider, Tatiana	12th Grade	Bennett_Debra	A	SADoc High School(300433)

16 Records Displayed [Back To Top](#)

[\[ Show Search \]](#)

2. Make any of the following changes to the ad-hoc membership as needed:
  - Edit the **Membership Name** field.
  - Change the active status by selecting or deselecting the **Active** checkbox.
  - Change the privacy status by selecting on deselecting the **Make Private** checkbox.
  - Remove a student by clicking  in the row of the student.
  - Add a student:
    - i. Click **[Show Search]**.
    - ii. Select either or both of the following **Search Mode** options:

- **Search Criteria** – Use as many fields as necessary on the **General Info**, **Additional Info**, **Miscellaneous Info**, **Course Section Info**, and **Assessment Info** tabs to find students.

**Note:** Select the checkbox after any field to perform a wildcard search on the contents of that field.

- **Student IDs** – Enter student ID numbers separated by commas.
- (Optional) To change whether students returned in the search are initially selected for inclusion in the membership, select or deselect the **Students Selected by Default** checkbox.
  - Click **Search**.
  - Review the matching students. If necessary, select the checkbox beside a student to include the student in the membership. Or, deselect the checkbox to exclude the student.
  - To add the selected students to the membership, select **Add to Membership**. Or, to replace the existing membership group with the selected students, select **Replace Membership**.
  - Click **Add Selected Students**.

A confirmation displays the number of students added to the membership.

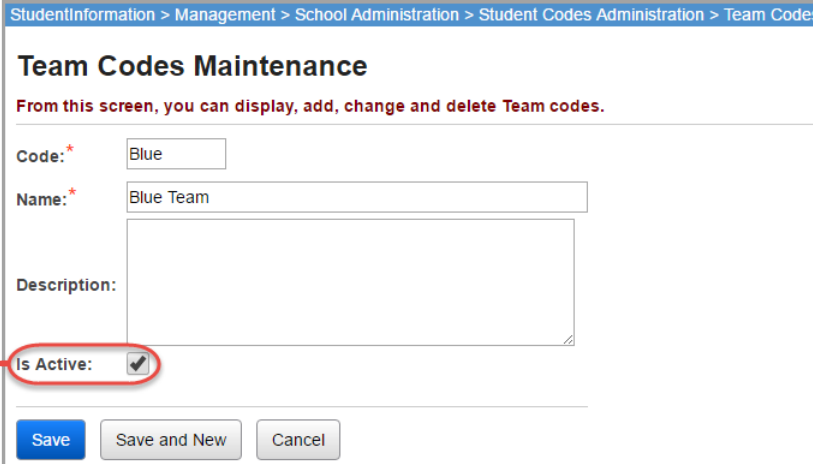
- Click **Save**.

## Reactivate Records

When you delete an active record (denoted by ●) in StudentInformation, it becomes inactive (denoted by ○). You can reactivate a record in the following ways:

- Enter the same name/code on a new record.
- Edit the record, select the **Is Active** or **Active** checkbox and save the record, as shown in the following example.

Click to reactivate the record. Then click Save.



The screenshot shows a web form titled "Team Codes Maintenance" with a breadcrumb trail: "StudentInformation > Management > School Administration > Student Codes Administration > Team Codes". Below the title, a red instruction reads: "From this screen, you can display, add, change and delete Team codes." The form contains several fields: "Code:" with the value "Blue", "Name:" with the value "Blue Team", and a "Description:" text area. At the bottom, there is a label "Is Active:" followed by a checked checkbox. Below the form are three buttons: "Save" (highlighted in blue), "Save and New", and "Cancel". A red circle highlights the "Is Active:" checkbox, and a red arrow points from the text "Click to reactivate the record. Then click Save." to this checkbox.

## Run Reports

StudentInformation provides numerous standard reports as well as an ad hoc reporting tool so you can create your own customized reports. Refer to the appropriate topic as follows:

- For information on running standard reports, see [“Run Standard Reports.”](#)
- To create and run your own customized reports or those set up by your district, see [“Run Quick Reports.”](#)

### Run Standard Reports

This topic describes how to run the standard reports available in StudentInformation. (For information on creating and running custom reports, see [“Run Quick Reports.”](#))

1. On the **Selection Criteria** tab of the report, select the information by which you want to filter the report. Typically, the more filters you select, the narrower the search results. Note the following:
  - You must complete all required fields (\*) to run the report.
  - For open text fields like **Student Numbers**, enter each piece of data separated by a comma.
  - For any multi-select lists, select item(s) by moving them from the left side of the screen to the right.
  - For reports with an **Output** option, select whether to generate a report and/or labels. When printing labels, note the following page settings:
    - For Adobe 9:
      - Page Scaling = None
      - Auto Rotate and Center = Unchecked
    - For Adobe 10:
      - Size Options = Actual Size
      - Orientation = Portrait

**Note:** *If you are using Firefox, you must change a setting before printing labels. In Firefox, go to **Options**. On the **Applications** window below **Content Type**, locate **Portable Document Format (PDF)**. In the **Action** column of that row, change the selection from **Preview** in Firefox to an Adobe option (such as **Use Adobe Acrobat**).*

2. In the **Delivery Method** drop-down list, select how you want to receive the report:
  - **Pickup** – Retrieve the report on the **Batch/Report Management** window.
  - **Email Notification** – Receive an email with a link to the report when the report is ready to view.
  - **Email Delivery** – Receive an email with the report included as a PDF attachment.
3. (Optional) To make the delivery method you selected in [step 2](#) the default selection each time you run reports, click **Set As Default**.

4. Confirm your **Email Address**, which defaults from your StudentInformation user profile. If necessary, make any changes in your profile.
5. In the **Report Format** drop-down list, select the output format in which you want to generate the report: **Adobe PDF**, **Rich text format (RTF)**, **Text**, **Excel Spreadsheet**, or **HTML**.
6. (Optional) Enter a **Description** of the report. This text displays on the **Batch/Report Management** screen.
7. Click **Submit**.

StudentInformation > SIS > School > Student Reports > Administrative Homeroom Summary (R201-B)

### Administrative Homeroom List Summary (R201-B)

From this screen, you can select parameters to generate a report.

Selection Criteria   Selection Summary   Load Settings

Homeroom Term:

Homeroom Date: \*12/15/2016

**Student Status**

A - ACTIVE RES	↔	
ACCA - ASHLAND ACADEMY	↔	
AE - ACTIVE ELSEWHERE	↔	
D - DELETED	↔	

**Administrative Homeroom**

0-106 - BLACKWOOD (Full Year Term)	↔	
0-108 - HOCKMAN (Full Year Term)	↔	
0-120 - BROGLE (Full Year Term)	↔	
0-124 - HOFFMAN (Full Year Term)	↔	

**Grade Level**

09 - 09	↔	
10 - 10	↔	
11 - 11	↔	
12 - 12	↔	

**Sorting Options**

Teacher Name (DESC)	↔	Teacher Name (ASC)
Homeroom (ASC)	↔	
Homeroom (DESC)	↔	
Grade (ASC)	↔	

Delivery Method:  Pickup

Email Address:

Report Format:  Adobe PDF

Description:

**Note:** StudentInformation saves your selection criteria and defaults them the next time you run this specific report unless you specify otherwise on the **Load Settings** tab.

The **Batch/Report Management** window opens with your report listed at the top.

Student Information		Batch/Report Management			12/15/2016 8:32:26 AM	
Display: All		<a href="#">Refresh Display</a>				
<input type="checkbox"/>	Job Type	Job Name	Job Description	Job Status	School Name	Date Added ▼
<input type="checkbox"/>	Report	<a href="#">Administrative Homeroom List Summary (R201-B)</a>	Active Residents Full Year Term	Complete	ASHLAND HIGH SCHOOL	12/15/2016 8:30:53 AM
<input type="checkbox"/>	Report	<a href="#">Discipline Total Summary</a>		Complete	ASHLAND HIGH SCHOOL	12/15/2016 8:23:16 AM
<input type="checkbox"/>	Report	<a href="#">Discipline Total Detail</a>		Complete	ASHLAND HIGH SCHOOL	12/15/2016 8:23:03 AM
<input type="checkbox"/>	Report	<a href="#">Discipline Infraction</a>		Complete	ASHLAND HIGH SCHOOL	12/15/2016 8:22:42 AM
<a href="#">Close</a>		<a href="#">Clear All Items</a>	<a href="#">Clear Selected Items</a>	<a href="#">Refresh Display</a>		

8. Click the report link in the **Job Name** column to open the report. (If the link does not display, the report is still generating. Click **Refresh Display** until the link displays.)

12/15/2016		Administrative Homeroom List Summary		8:31 AM	
User Name: ██████████		Total Report Pages: 1			
School:		ASHLAND HIGH SCHOOL			
School Year:		2016-2017			
Sorting Options:		TeacherNameSort ASC, HomeroomCode ASC, HomeroomCode ASC			
Criteria					
Homeroom Date		12/15/2016			
Administrative Homeroom		7-104B - THOMAS (Full Year Term)			
Sort Parameters		Teacher Name (ASC), Homeroom (ASC)			

9. (Optional) Review the criteria you selected for this report or change the description on the **Selection Summary** tab of the report. You can also submit the report from this tab.

StudentInformation > SIS > School > Student Reports > Administrative Homeroom Summary (R201-B)

### Administrative Homeroom List Summary (R201-B)

From this screen, you can select parameters to generate a report.


Selection Criteria    Selection Summary    Load Settings

**Homeroom Term:** Full Year Term  
**Homeroom Date:** 12/15/2016  
**Student Status:** A - ACTIVE RES  
**Administrative Homeroom:** 7-104B - THOMAS (Full Year Term)  
**Sort Parameters:** Teacher Name (ASC), Homeroom (ASC)

Description: Active Residents Full Year Term

Submit

10. (Optional) To save default selection criteria for frequently used reports, do the following:
  - a. On the **Load Settings** tab of the report, enter a **Name** for the current setting of your selection criteria.
  - b. If you want other users to have access to your load settings, deselect the **Private** checkbox.
  - c. Click **Save**.
  - d. In the **Default Settings On Startup** drop-down list, select the settings you want StudentInformation to use by default the next time you run the report: either **Load Last Parameters** or one of the settings you created, which display in the grid.

**Note:** Click  to delete load settings you have created. Only administrators with the appropriate security settings can delete load settings saved by other users.


**Note:** If you click a **Name** in the grid, the saved settings load on the **Selection Criteria** tab.

StudentInformation > SIS > School > Student Reports > Administrative Homeroom Summary (R201-B) [Find Students]

### Administrative Homeroom List Summary (R201-B)

From this screen, you can select parameters to generate a report.

Selection Criteria | Selection Summary | Load Settings

Name	Private	Available In "I Want To" Menu	Creator	Date Created
 Homeroom Count	<input type="checkbox"/>	<input type="checkbox"/>	Principal, John (hstr_pjohn)	Aug 06, 2012

Default Settings On Startup: Load Last Parameters ▾

**Current Settings**

Name: \*

Private:


## Run Quick Reports

In addition to the standard report functionality described in [“Run Standard Reports,”](#) you can create your own custom reports using the report designer within StudentInformation. (See [“Create Quick Reports”](#) and [“Run Quick Reports.”](#))

### Create Quick Reports


**Navigation:** StudentInformation > Local > Report Designer

If you have the proper security access, you can create customized reports using the report designer.

**Note:** For instructions and help using the report designer, on the **Report Designer** screen, click .

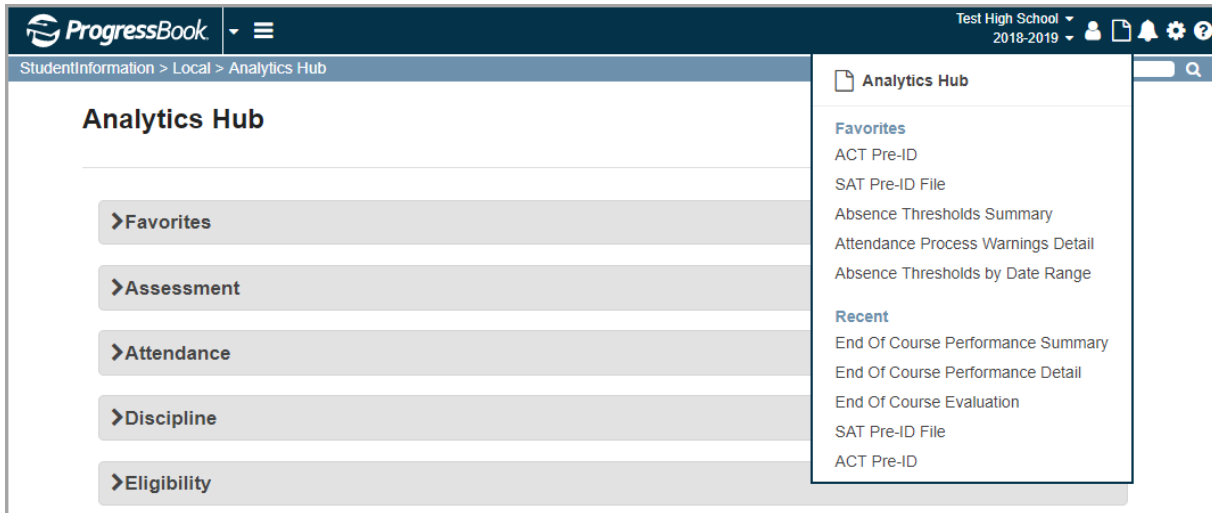
## Run Quick Reports

You can run your custom reports or those created by your district directly from any screen as follows:

1. With a district or school in context on any screen, in the banner, click .



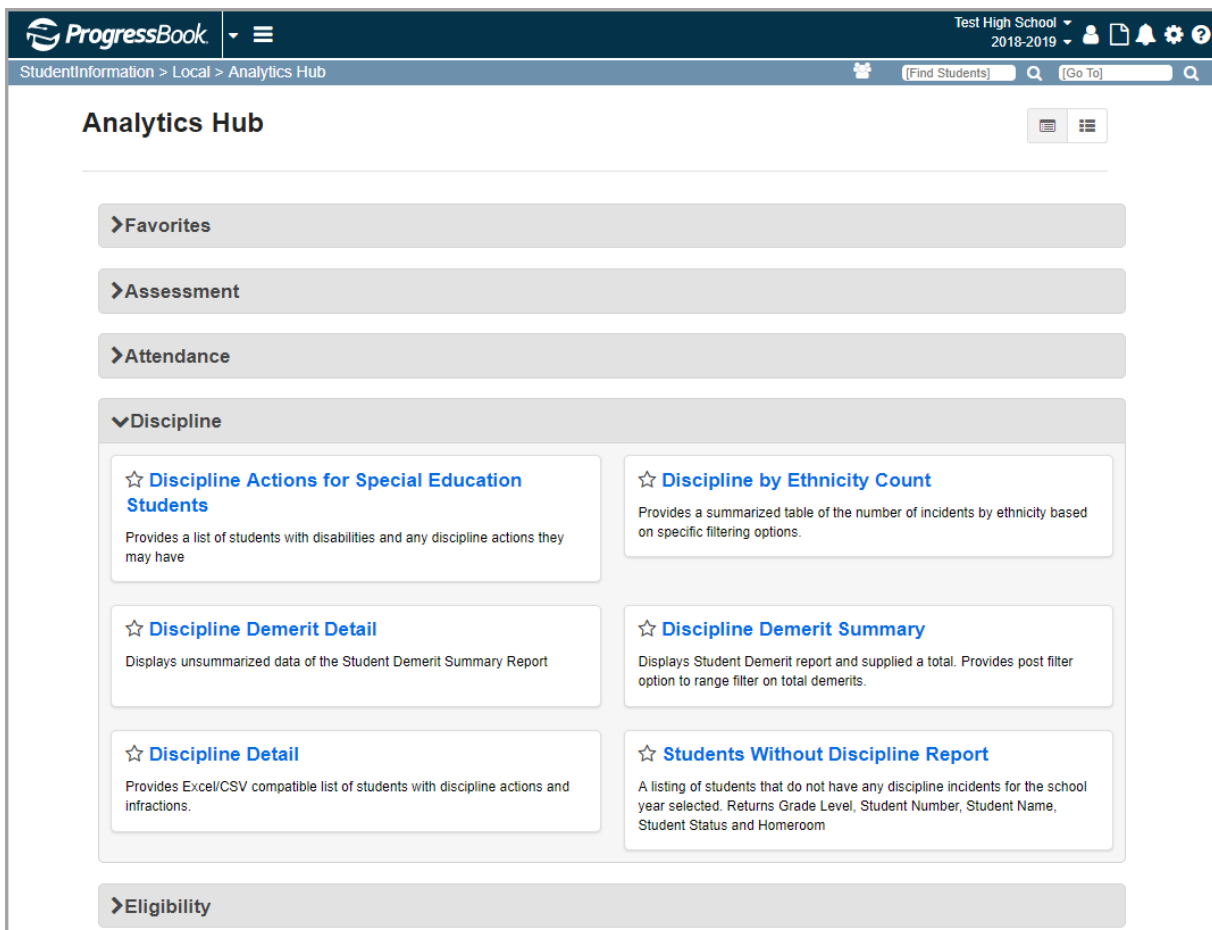
The quick reports drop-down list displays.



2. From this drop-down list, you can do any of the following:

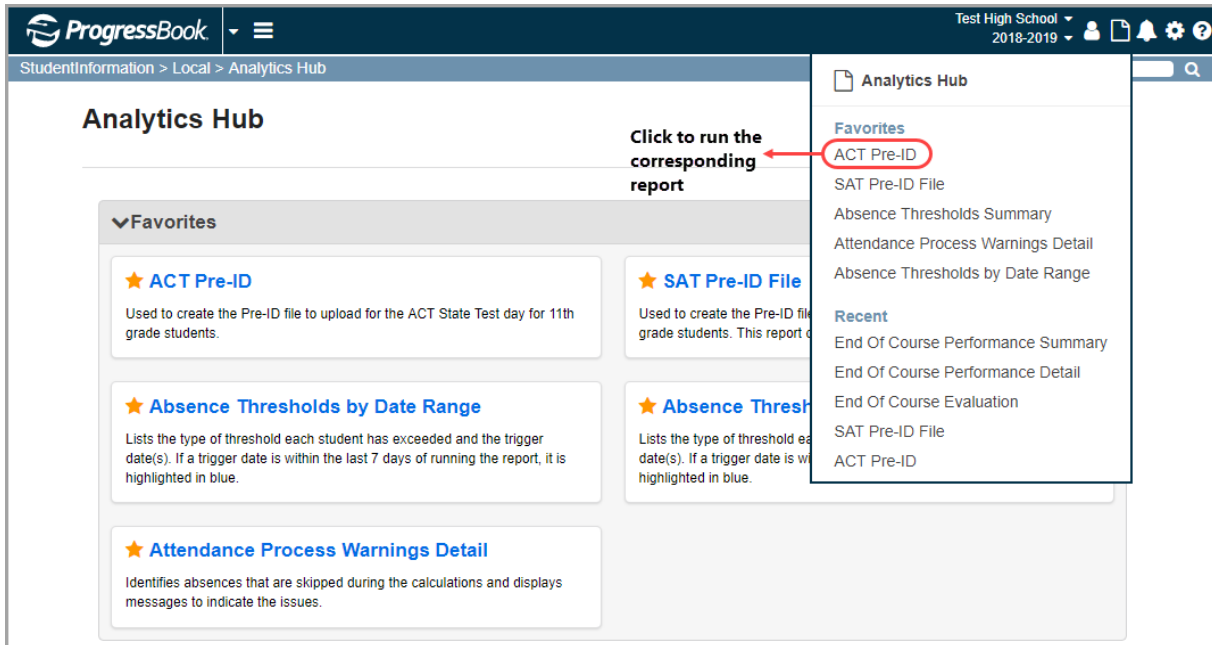
- Click **Analytics Hub** to view the **Analytics Hub** screen.

The **Analytics Hub** screen displays all reports to which you have access. Click the name of a report to run it.



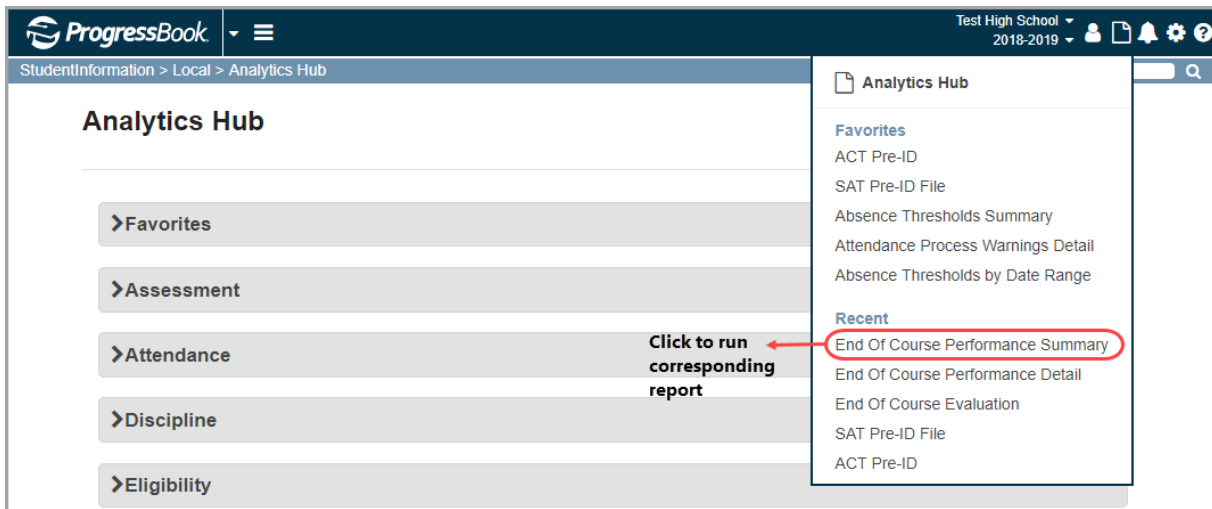


- Below **Favorites**, up to 5 favorited reports display. To favorite a report, on the **Analytics Hub** screen beside the report name, click ☆ and it changes to ★. Click on any report name to run the report. If you do not have any favorited reports, this section is hidden.



**Note:** The **Favorites** folder is also hidden if you do not have any favorited reports.

- Below **Recent**, the last 5 reports you ran display. Click any report name to run the report.



## Run Batch Jobs

Batch jobs perform a specific action on a “batch” of students or records.

1. On the screen of the batch job you want to run, proceed through the tabs (using the **Next** button) to select records or options to filter the batch job. Typically, the more filters you select, the narrower the search results. If you do not select any filters, you run the batch job on all records.

**Note:** For any dual listboxes, select item(s) by moving them from the left to the right.

The screenshot shows the 'Student Fee Assignment' interface. At the top, there is a breadcrumb trail: 'StudentInformation > Management > Ad-Hoc Updates > Student Fee Assignment'. Below this is the title 'Student Fee Assignment' and a subtitle 'Create and update student fee assignments in bulk'. There are five tabs: 'Students', 'Assignments', 'Options', 'Confirmation', and 'Results'. The 'Students' tab is active. Underneath, there are two radio buttons: 'Search Criteria' (selected) and 'Ad-Hoc Membership'. The interface features four dual listboxes for filtering:

- Grade Level:** Left listbox contains '9 - 9th Grade', '10 - 10th Grade', '11 - 11th Grade', '13 - 13 Compl.Crs', and '23 - 23 Compl.Ed.'. The right listbox contains '12 - 12th Grade'.
- Homerroom:** Left listbox contains 'DOHS61 - Rivera (Full Year)', 'DOHS62 - Cooper (Full Year)', 'DOHS63 - Richardson (Full Year)', 'DOHS64 - Cox (Full Year)', and 'DOHS65 - Howard (Full Year)'. The right listbox contains 'DOHS56 - Cook (Full Year)', 'DOHS57 - Morgan (Full Year)', 'DOHS58 - Bell (Full Year)', 'DOHS59 - Murphy (Full Year)', and 'DOHS60 - Bailey (Full Year)'.
- Student Status:** Left listbox contains 'D - DELETED', 'I - INACTIVE', 'J - JVS RES', 'N - NON-RES', and 'O - OTH NONRES'. The right listbox contains 'A - ACTIVE RES'.
- Gender:** Left listbox contains 'F' and 'M'. The right listbox is empty.

At the bottom of the form, there are two buttons: 'Cancel' and 'Next >'.

2. On the **Confirmation** tab, review the information and click **Finish** to process the batch job.

StudentInformation > Management > Ad-Hoc Updates > Student Fee Assignment

### Student Fee Assignment

Create and update student fee assignments in bulk

Students Assignments Options **Confirmation** Results

Fee Date: 12/15/2016  
Included General Fees: Not Selected  
Included Course Fees: Not Selected  
Included Miscellaneous Fees: 28  
Included Program Fees: 0  
Included Membership Fees: Not Selected  
Students to be Processed: 215  
Existing Fee Assignments: 0  
Existing Fee Handling: Skip fee assignment if assignment already exists

Cancel < Back **Finish**

3. On the **Results** tab, review the updated records.

- (Optional) To start a new batch job, click **Start Over**, and repeat the procedure.

StudentInformation > Management > Ad-Hoc Updates > Student Fee Assignment

### Student Fee Assignment

Create and update student fee assignments in bulk

Students Assignments Options Confirmation Results

The following assignments could not be made

Student	Fee Type	Fee Code	Fee Amount	Reason for Failure
There are no records to display				

The following fee assignments were made

Student	Grade	Status	Fee Type	Fee Code	Fee Amount	Details
Ballard, Julie	12	A			\$20.00	New student fee created
Brady, Larissa	12	A			\$20.00	New student fee created
Buchanan, Maren	12	A			\$20.00	New student fee created
Christensen, Winnie	12	A			\$20.00	New student fee created
Copeland, Caley	12	A			\$20.00	New student fee created
Gill, Aaliyah	12	A			\$20.00	New student fee created
Holloway, Wyoming	12	A			\$20.00	New student fee created
Mcbride, Laila	12	A			\$20.00	New student fee created
Nunez, Caitlin	12	A			\$20.00	New student fee created
Parsons, Alison	12	A			\$20.00	New student fee created
Pratt, Dakin	12	A			\$20.00	New student fee created
Roy, Justine	12	A			\$20.00	New student fee created
Simon, Marley	12	A			\$20.00	New student fee created
Smith, Flor	12	A			\$20.00	New student fee created
Smith, Frieda	12	A			\$20.00	New student fee created
Wise, Daria	12	A			\$20.00	New student fee created

16 Records Displayed [Back To Top](#)

**Start Over**

## Understand Address Standardization and Verification

If you have appropriate security access, you can enable address standardization and verification to ensure the accuracy of address data in StudentInformation.

If you enable address standardization, StudentInformation standardizes all addresses to fit USPS standards. This includes removing punctuation, checking to see if the address is within the valid range of house numbers for the street, and changing the zip code to the correct zip+4 code. In addition to the mailing benefits, this behavior provides more consistent and correctly-spelled address entries, allowing easier searching by address.

You can use address standardization alone or with address verification. If you enable address verification (which requires you to first enable address standardization), StudentInformation verifies that a student's address is within the district where the student is enrolled.

**Note:** You must first define valid district addresses on the **View/Edit District Addresses** screen. You can determine if an address is within the district on the **Students Failing Address Verification** screen.

- To enable address standardization, see [“Enable Address Standardization.”](#)
- To enable address verification, see [“Enable Address Verification.”](#)
- To validate an address when you have standardization and verification enabled, see [“Validate an Address.”](#)

## Enable Address Standardization

**Navigation:** StudentInformation > Management > School Administration > School Building Administration > School Demographics

1. Ensure you have the district selected as your working school.
2. On the **School Demographics** screen, select the **Use Address Standardization** checkbox.
3. Click **Save**.

StudentInformation > Management > School Administration > School Building Administration > School Demographics

**School Demographics**

This page is used to manage the demographic information for your school

School Code:*	DOHS	School Name:*	SADoc High School
School Type:*	School	School Subtype:	-- Select a School Subtype --
IRN:	300433	Principal:	Mary Smiles
Website URL:	http://www.MySchool.edu	District:	SADoc
ThinkGate School Type:	-- Select a School Type --	Use Address Standardization:	<input checked="" type="checkbox"/>
		Use Address Verification:	<input type="checkbox"/>

4. Change your working school to the building for which you want to enable address standardization.
  5. Repeat [step 2](#) through [step 3](#).
- StudentInformation enables address standardization for the building.

## Enable Address Verification

**Navigation:** StudentInformation > Management > School Administration > School Building Administration > School Demographics

1. Ensure you have the district selected as your working school.
2. On the **School Demographics** screen, ensure the **Use Address Standardization** checkbox is selected.
3. Select the **Use Address Verification** checkbox.

4. Click **Save**.

StudentInformation > Management > School Administration > School Building Administration > School Demographics

### School Demographics

This page is used to manage the demographic information for your school

School Code:*	DOHS	School Name:*	SADoc High School
School Type:*	School	School Subtype:	-- Select a School Subtype --
IRN:	300433	Principal:	Mary Smiles
Website URL:	http://www.MySchool.edu	District:	SADoc
ThinkGate School Type:	-- Select a School Type --		
Use Address Standardization:	<input checked="" type="checkbox"/>	Use Address Verification:	<input checked="" type="checkbox"/>


5. Change your working school to the building for which you want to enable address verification.
6. Repeat [step 2](#) through [step 4](#).

StudentInformation enables address verification for the building.

**Note:** As of ProgressBook Suite v20.0.0, address verification no longer applies to staff records.

**Note:** You can bypass address verification on individual addresses if needed.

## Validate an Address

If you have address standardization and address verification enabled, any time you enter a new address in StudentInformation,  displays to alert you that you must validate the address.

**Note:** As of ProgressBook Suite v20.0.0, address verification no longer applies to staff records.

Address of Residence (For Address Verification)

Street:\*

6770 West Snowville Road

City, State, Zip:\*

Brecksville OH 44141

Bypass Address Standardization



**Validate**

Indicates you must validate this address. Click Validate.


1. Click **Validate**.

StudentInformation updates the fields to the correct USPS mailing address and verifies that the address exists in the district.

**Note:** Addresses are standardized according to <http://www.usps.com>.

2. Note the status of the update, which displays as  if successful or  if unsuccessful. If standardization and/or verification is unsuccessful, a message displays indicating the reason.

**Address of Residence (For Address Verification)**

Street: \*  

City, State, Zip: \*

Bypass Address Standardization

Address Standardization Failed

3. (Optional) If you know the address cannot be standardized or verified for some reason or if the standardized address contains an error, do the following:
  - a. Select the **Bypass Address Standardization/Verification** checkbox.  
The **Bypass Comments** field displays.
  - b. Enter a reason for bypassing address standardization.
4. Click **Save**.

**Address of Residence (For Address Verification)**

Street: \*

City, State, Zip: \*

Bypass Address Standardization

**Bypass Comments:**