



HeadMaster:

Working with HeadMaster Data

Thursday

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3:10pm – 4:20pm

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Introduction to This Guide

Now that you have your data entered in HeadMaster, what do you do with it? This guide shows you several ways to manage your information in HeadMaster.

This guide includes these concepts:

- Working with Grids
- Searching for Information
- Using HeadMaster Reports
- Using Advanced Exports
- Using the Utility Manager

Unit 1: Working with Grids

HeadMaster tracks a wealth of information. You can manipulate all of this information by sorting, filtering, and adding and removing columns. You can save different views to refer to whenever necessary and you can also print and export information.

You can customize all HeadMaster grids. This document focuses on the student grid.

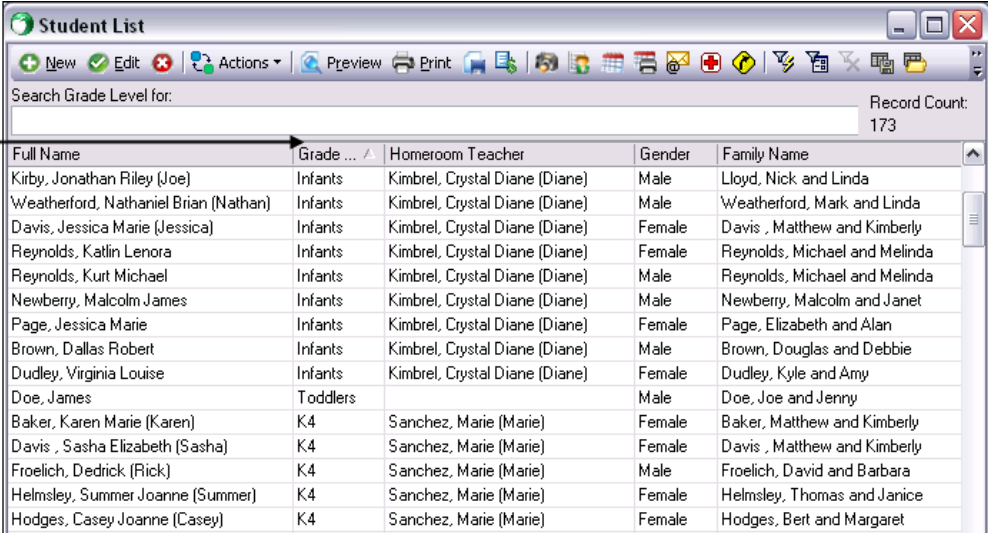
You will be able to:

- Sort grids
- Filter grids
- Add, remove, and rearrange columns
- Save and open views
- Preview and print grids
- Export information
- Details window

On the **Home** screen, click **Students** to access the student grid.

To sort the grid, click the column header above the contents you want to sort.


Click Header to sort information



Full Name	Grade ...	Homeroom Teacher	Gender	Family Name
Kirby, Jonathan Riley (Joe)	Infants	Kimbrel, Crystal Diane (Diane)	Male	Lloyd, Nick and Linda
Weatherford, Nathaniel Brian (Nathan)	Infants	Kimbrel, Crystal Diane (Diane)	Male	Weatherford, Mark and Linda
Davis, Jessica Marie (Jessica)	Infants	Kimbrel, Crystal Diane (Diane)	Female	Davis, Matthew and Kimberly
Reynolds, Katlin Lenora	Infants	Kimbrel, Crystal Diane (Diane)	Female	Reynolds, Michael and Melinda
Reynolds, Kurt Michael	Infants	Kimbrel, Crystal Diane (Diane)	Male	Reynolds, Michael and Melinda
Newberry, Malcolm James	Infants	Kimbrel, Crystal Diane (Diane)	Male	Newberry, Malcolm and Janet
Page, Jessica Marie	Infants	Kimbrel, Crystal Diane (Diane)	Female	Page, Elizabeth and Alan
Brown, Dallas Robert	Infants	Kimbrel, Crystal Diane (Diane)	Male	Brown, Douglas and Debbie
Dudley, Virginia Louise	Infants	Kimbrel, Crystal Diane (Diane)	Female	Dudley, Kyle and Amy
Doe, James	Toddlers		Male	Doe, Joe and Jenny
Baker, Karen Marie (Karen)	K4	Sanchez, Marie (Marie)	Female	Baker, Matthew and Kimberly
Davis, Sasha Elizabeth (Sasha)	K4	Sanchez, Marie (Marie)	Female	Davis, Matthew and Kimberly
Froelich, Dedrick (Rick)	K4	Sanchez, Marie (Marie)	Male	Froelich, David and Barbara
Helmsley, Summer Joanne (Summer)	K4	Sanchez, Marie (Marie)	Female	Helmsley, Thomas and Janice
Hodges, Casey Joanne (Casey)	K4	Sanchez, Marie (Marie)	Female	Hodges, Bert and Margaret

Figure 1: Single Sort by Grade Level

To multi-sort the grid, press and hold the Shift key and click another column.

 **Useful Information**

When multi-sorting, your next sort will be based on the previously sorted column.

For example, when you click the **Grade Level** header, press and hold the **Shift** key, and then click the **Full Name** header. This action places all students in alphabetical order by Homeroom Teacher.

If you choose to arrange the students by Date of Birth after the first sort, the students will no longer be in alphabetical order.

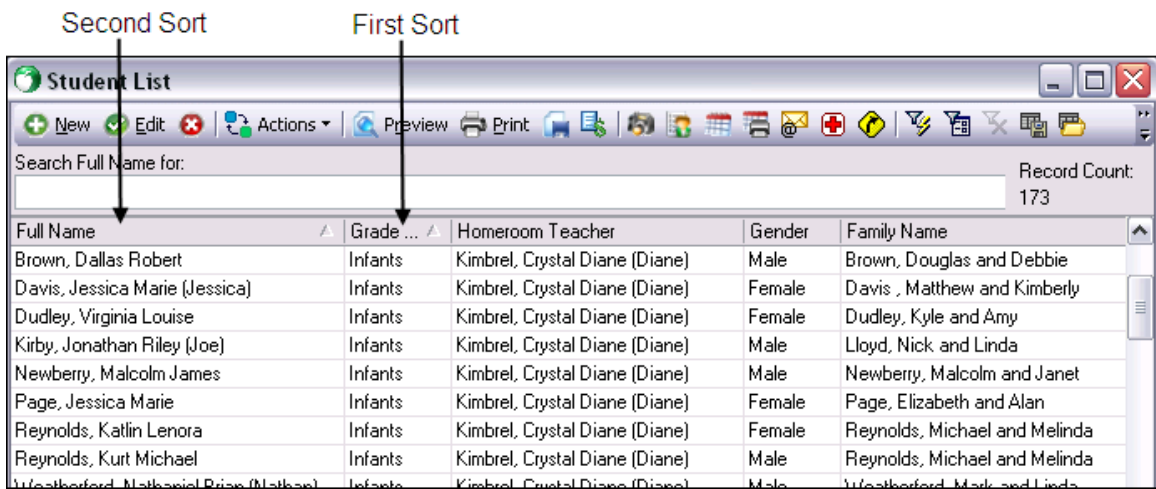


Figure 2: Multi-Sort by Grade Level, then Full Name

To filter the grid:

1. Select the attribute by which you want to filter student records.
2. Click the **Filter by Selection** icon.

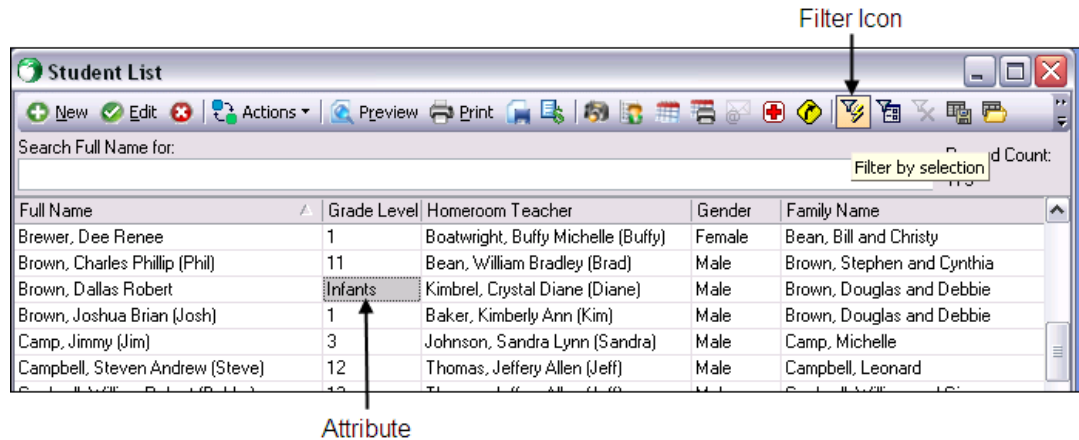


Figure 3A: Filter by Selection



Useful Information

You can select an attribute, and then click **Filter by Selection** as often as necessary.

For example, select **Grade Level 5** and click **Filter**. From the filtered list, select a **Homeroom Teacher** and click **Filter** again. From this final filtered list, select **Female** and click **Filter**.

Your results are the total number of females who have the selected Homeroom Teacher.

- To view a grade range of students, click **Filter by Form** icon.

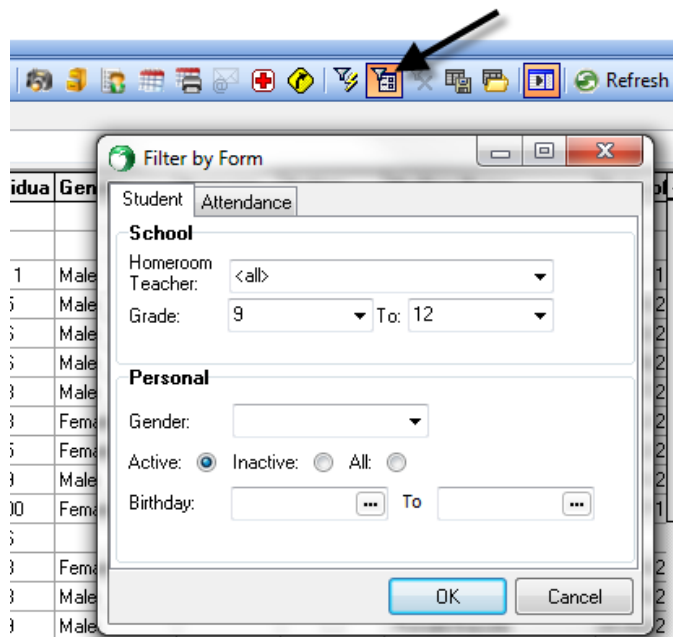


Figure 3B: Filter by Form

- To clear the filter, click the **Clear Filter** icon.

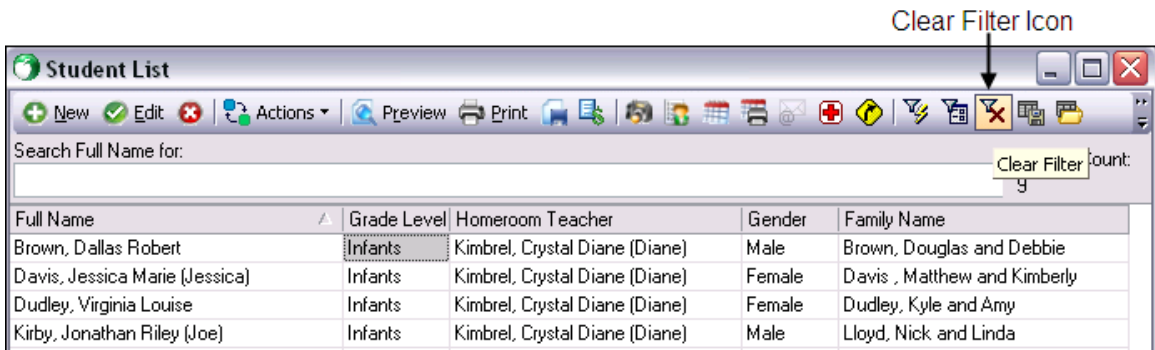


Figure 4: Clearing the Filter

To rearrange columns:

1. Click and drag the appropriate column to the left or right. Green arrows appear to indicate this movement.
2. Release the mouse button when the column is in the chosen area.

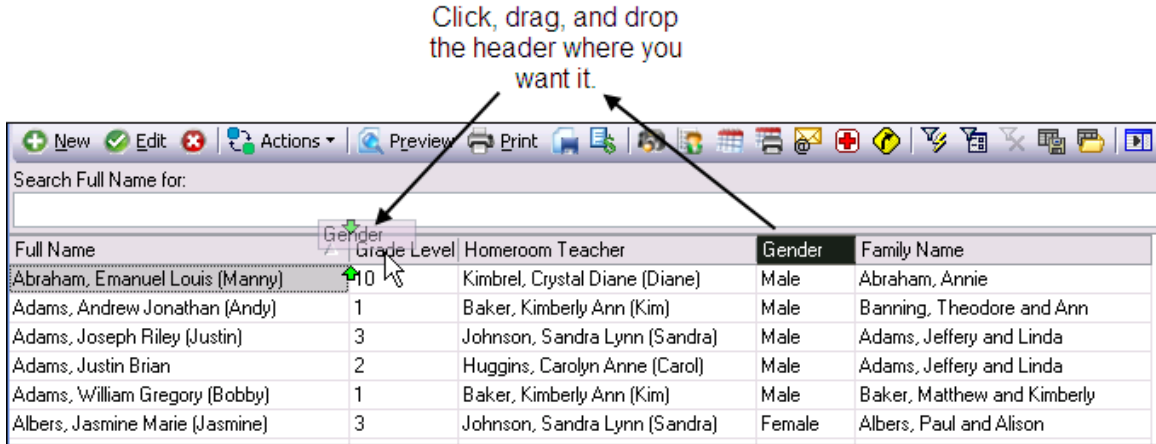


Figure 5: Rearranging Columns

To remove and add columns:

1. Right-click the grid.
2. Select **Customize**. The **Customize Student Grid** window appears.

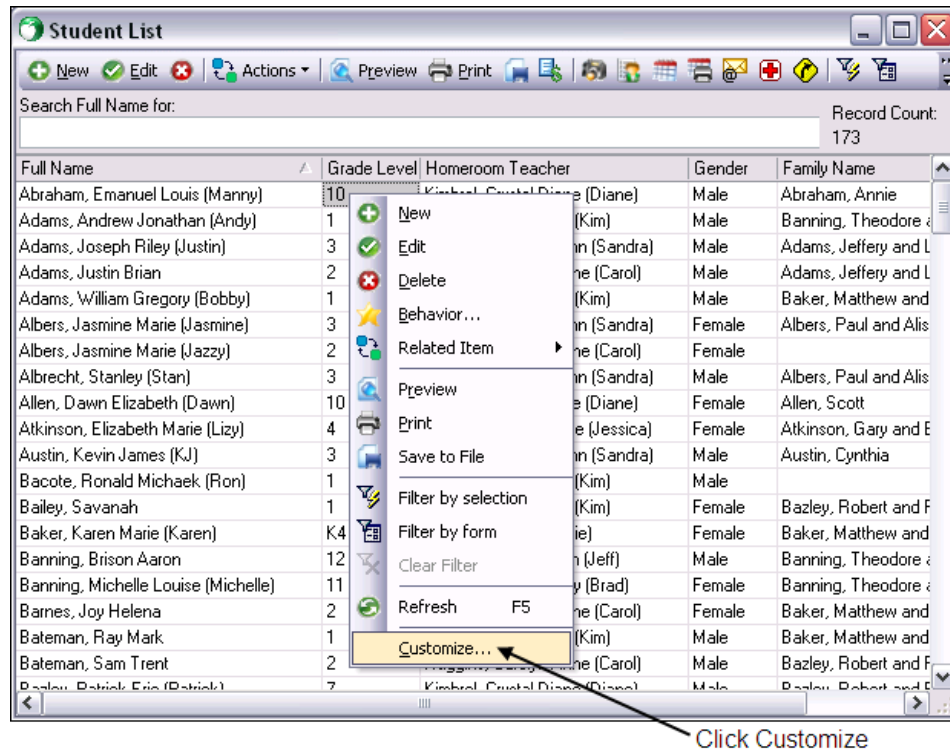


Figure 6: Customizing the grid



Useful Information

When the Customize window displays, check or uncheck the attributes you want to view.

To save a view:

1. Customize the grid as needed.
2. Click the **Save Current View** icon.

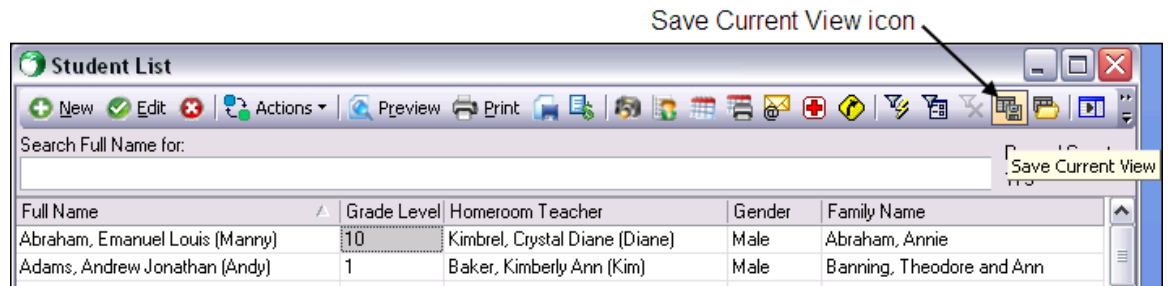


Figure 7: Save Current View icon

3. Name the view.
4. Click **OK**.



Useful Information

You can create an unlimited number of views and access them at any time.

To open a saved view:

1. Click the **Open Saved View** icon.
2. Select the view.
3. Click **Load Selected**.

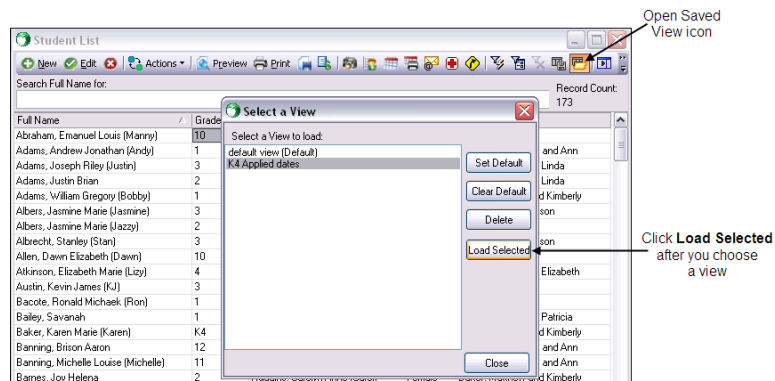


Figure 8: Open a saved view

To preview and print a view:

1. Select a view or create a new one.
2. Click **Preview**.
3. Click the **Design Report** icon to change the title. This is not required.

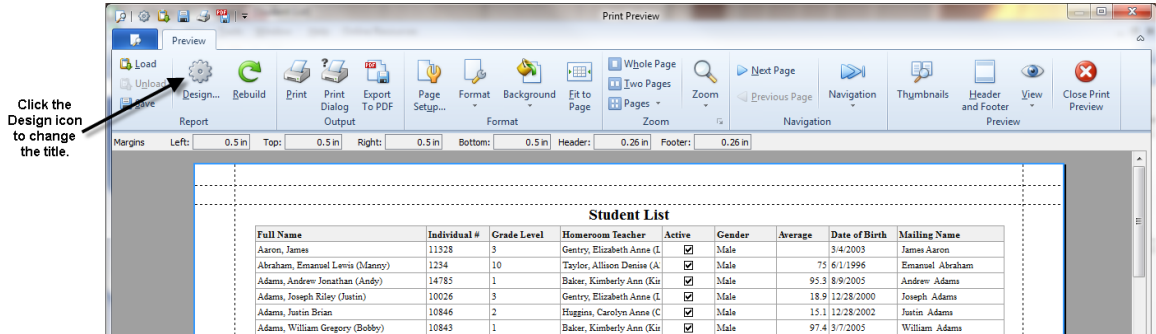


Figure 9: Click Design Report to change the title

4. When you are finished previewing the report, click **File**.
5. Select **Print** or **Close**.

To export a view:

1. Select a saved view or create a new one.
2. Click the **Save to File** icon.

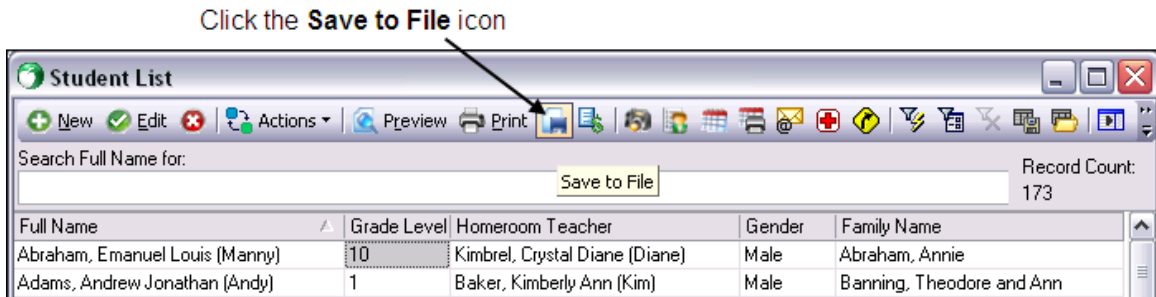


Figure 10: Save to File

3. Select where you want to save the file.
4. Enter the **File Name**.
5. In the **Save as Type** field, save the file as .html, .txt, or .csv.
6. Click **Save**.

To display the Details window: the Details window displays important parent contact information.

1. While on the student list, click the **Details** icon.
2. Select a student to display on the right.
3. To display another student's information, click another student.

The screenshot shows a software window titled "Student List" with a search bar and a toolbar. A table lists students with columns for Full Name, Individual #, Grade Level, Homeroom Teacher, and Active status. The student "Banning, Michelle Louise (Michelle)" is selected. To the right, a details panel shows personal information (Grade Level: 12, Address: 3654 Red Tip Circle, Florence, SC 29501), a photo, and sections for Attendance & Grades, Parent Contacts, Emergency Contacts, and Pickups.

Full Name	Individual #	Grade Level	Homeroom Teacher	Active
Abraham, Emanuel Lewis (Manny)	1234	11	Bean, William Bradley (Br)	<input checked="" type="checkbox"/>
Adams, Andrew Jonathan (Andy)	14785	2	Huggins, Carolyn Anne (C)	<input checked="" type="checkbox"/>
Adams, Joseph Riley (Justin)	10026	4	Bacote, Jessica Marie (Je)	<input checked="" type="checkbox"/>
Adams, William Gregory (Bobby)	10843	1	Baker, Kimberly Ann (Kim)	<input checked="" type="checkbox"/>
Albers, Marci Elizabeth	11141	11	Bean, William Bradley (Br)	<input checked="" type="checkbox"/>
Allen, Dawn Elizabeth (Dawn)	290000	11	Bean, William Bradley (Br)	<input checked="" type="checkbox"/>
Anderson, Melissa Allison	11322	10	Taylor, Allison Denise (All)	<input checked="" type="checkbox"/>
Atkinson, Elizabeth Marie (Lizy)	10043	5	Gentry, Elizabeth Anne (L)	<input checked="" type="checkbox"/>
Austin, Kevin James (KJ)	10048	4	Bacote, Jessica Marie (Je)	<input checked="" type="checkbox"/>
Bailey, Savannah	10852	2	Huggins, Carolyn Anne (C)	<input checked="" type="checkbox"/>
Baker, Karen Marie (Karen)	10053	K5	Creech, Rachel Jean (Ra)	<input checked="" type="checkbox"/>
Banning, Michelle Louise (Michelle)	10118	12	Alexander, William Stevei	<input checked="" type="checkbox"/>
Banning, Richardson Michael	11403	11	Bean, William Bradley (Br)	<input checked="" type="checkbox"/>
Barnes, Joy Helena	10855	3	Johnson, Sandra Lynn (S)	<input checked="" type="checkbox"/>
Bateman, Ray Mark	12345	2	Huggins, Carolyn Anne (C)	<input checked="" type="checkbox"/>
Bateman, Sam Trent	10858	3	Johnson, Sandra Lynn (S)	<input checked="" type="checkbox"/>
Bazley, Patrick Eric (Patrick)	10063	8	Rozier, Rita Elizabeth (Ri)	<input checked="" type="checkbox"/>
Bazley, William Dean (Will)	10119	6	McKenzie, David Allen (A)	<input checked="" type="checkbox"/>
Bean, Jennifer Lynn (Jennie)	10068	6	McKenzie, David Allen (A)	<input checked="" type="checkbox"/>
Bentley, Eric Richard (Ricky)	10073	6	McKenzie, David Allen (A)	<input checked="" type="checkbox"/>
Berry, Susan Elisha (Susie)	10120	12	Alexander, William Stevei	<input checked="" type="checkbox"/>
Bethea, Katrina Cassandra	10830	12	Alexander, William Stevei	<input checked="" type="checkbox"/>
Bishara, Carressa Caroline	10840	12	Alexander, William Stevei	<input checked="" type="checkbox"/>
Bishara, Steve Makram	10835	12	Alexander, William Stevei	<input checked="" type="checkbox"/>
Black, Holly	10083	5	Gentry, Elizabeth Anne (L)	<input checked="" type="checkbox"/>
Braddock, Brady Alan (Brady)	10088	3	Johnson, Sandra Lynn (S)	<input checked="" type="checkbox"/>
Brewer, Deanna Nicole	10861	2	Huggins, Carolyn Anne (C)	<input checked="" type="checkbox"/>
Brewer, Dee Renee	10860	2	Huggins, Carolyn Anne (C)	<input checked="" type="checkbox"/>
Brown, Charles Phillip (Phil)	10098	12	Alexander, William Stevei	<input checked="" type="checkbox"/>
Brown, Dallas Robert	10827	Toddlers	Spivey, Splinter	<input checked="" type="checkbox"/>
Brown, Joshua Brian (Josh)	10093	2	Huggins, Carolyn Anne (C)	<input checked="" type="checkbox"/>
Camp, Jimmy (Jim)	10103	4	Bacote, Jessica Marie (Je)	<input checked="" type="checkbox"/>
Carlson, Brittany Shawna (Brittany)	10113	11	Bean, William Bradley (Br)	<input checked="" type="checkbox"/>
Carlson, Kristy Leanne (Kris)	10121	12	Alexander, William Stevei	<input checked="" type="checkbox"/>
Carter, Ashley Elizabeth (Ashley)	10122	6	McKenzie, David Allen (A)	<input checked="" type="checkbox"/>
Carter, Roger Blake (Blake)	11047	9	Drake, Belinda Fracis (Be)	<input checked="" type="checkbox"/>
Chapman, Jody Michelle (Jody)	10132	11	Bean, William Bradley (Br)	<input checked="" type="checkbox"/>
Cody, Sarah Jessica	10864	2	Huggins, Carolyn Anne (C)	<input checked="" type="checkbox"/>

Personal
 Banning, Michelle Louise (Michelle)
 Grade Level: 12
 Address: 3654 Red Tip Circle
 Florence, SC 29501

Attendance & Grades
 GPA:
 Average:
 Absences:
 - Excused: 1
 - Unexcused: 0
 Tardies:
 - Excused: 0
 - Unexcused: 0

Parent Contacts
 Family: Banning, Theodore and Ann
 Home: 843-662-1681

Emergency Contacts
 Theodore Banning
 - Home: 843-566-4771
 - Business: 843-655-2201()
 Ann Banning
 - Home: 843-566-4771
 - Business: 843-655-0521()

Pickups
 Theodore Banning
 - Phone: 843-566-4771
 - Tag: TBG 128
 - License: SC 8475123
 Ann Banning
 - Phone: 843-566-4771
 - Tag: ANB 284
 - License: SC 9586241


Figure 11: Student Details Window

Unit 2: Searching for Information

HeadMaster offers detailed search capabilities. You can apply Searches to reports and correspondence. You can also create Searches for the following groups: Class, Family, Other People, Parent, Prospective, Staff, Student, and Teacher.

To create Searches:


1. On the **Home** screen, click **Searches**.
2. Click **New**.
3. Enter a **Name**.
4. Select **Type**.
5. Enter a **Description**. This is not required.
6. Click the **Criteria** tab.
7. To select search criteria, double-click the criteria you want.
8. Select an **Operator**.



Useful Information

The term **Operator** includes several different options, such as **Is Equal To**, **Is Not Equal To**, **Is Less Than**, **Is Greater Than**, **Starts With**, **Contains**, or **Ends With**. The selected field determines which Operator options are available.

9. Select a **Value**.



Useful Information

Value options are determined by the field chosen.

10. Click **OK**.
11. For search results, click **Process Search**.

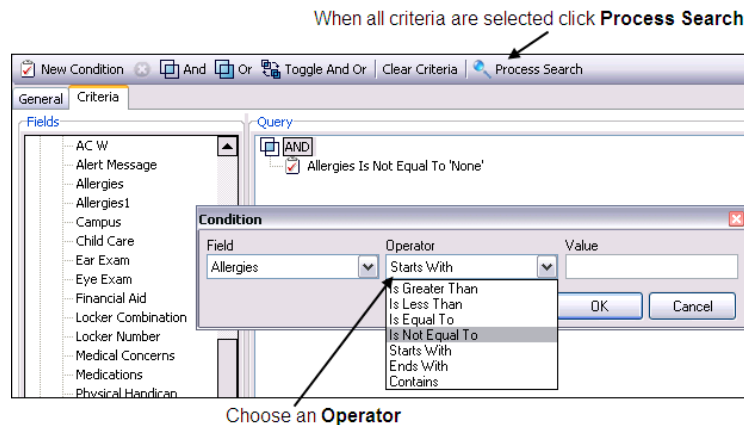


Figure 12: Selecting Search Criteria

Unit 3: Using HeadMaster Reports

HeadMaster offers over 120 predefined reports.

To access reports:

1. On the **Home** screen, click **Reports**.
2. Click “+” to the left of the report book you want.
3. Click the report you want to print.
4. Select **sort** or **filter** options.
5. Click **Preview**.
6. To print, click the **Print** icon.

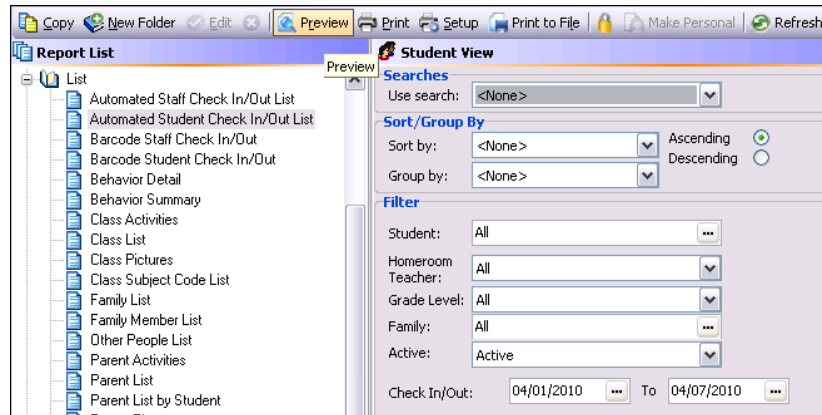


Figure 13: Report options

Frequently used reports

Report Book	Report Name
Directories	Expanded Student Directory
	Family Directory 6x3
	Student Directory
Emergency/Medical	Student Emergency Contacts
Labels	Address (Avery 5160)
List	Parent List by Student
	Staff ID Cards
	Student ID Cards
	Student Profiles
	Student Sign-out report
Miscellaneous	Enrollment Form
	Staff Birthday Report
	Student Birthday Report
Rosters	Class Address List
	Class Roster
Schedules	Student Schedule
	Teacher Schedule

Unit 4: Advanced Exports

With Advanced Exports, you can export specific information from HeadMaster to another software package.

Type	Export Title	Export Group	Created By	Date Created	Date Last Modified
	Class List	Class	HMAAdmin		
	Student Address List	Students	HMAAdmin		
	Student Emergency List	Student Emergency	HMAAdmin		
	Student Immunization	Immunization	HMAAdmin		
	Student Pickup List	Pickup	HMAAdmin		
	Teacher Address List	Teachers	HMAAdmin		

Figure 14: Advanced Export main screen

You can sort, filter, and rearrange the grids to view information. Click **Export** to save as a .CSV, tab delimited, or fixed length file that can be imported into other software.

City, State Zip	Primary Address Line 1	Primary Address Line 2
Florence, SC 29505	3082 W Court Ave	Florence, SC 29505
Florence, SC 29506	3424 West Hampton Pointe	Florence, SC 29506
Hartsville, SC 29550	1700 Bay Rd	Hartsville, SC 29550
Hartsville, SC 29550	1700 Bay Rd	Hartsville, SC 29550
Florence, SC 29501	416 Lafayette Circle	Florence, SC 29501
Reed Springs, MD 65737	3661 Dogwood Tree Road	Reed Springs, MD 65737

Figure 15: Advanced Export results screen


Unit 5: Using the HeadMaster Utility Manager

HeadMaster Utility Manager plays an important role in maintaining your HeadMaster software. With Utility Manager, you can perform many useful tasks, from creating backups to promoting students.

To access the Utility Manager, all users must be logged out of HeadMaster and Classroom Manager.

To view all currently logged in users:

1. On the **Home** screen, click **File**.
2. Select **Show Active Users**.
3. You can remove an individual user, ask active users to log off, or **Force Logout**.
4. Close HeadMaster.



Useful Information

You can click **Select All** to select all users but yourself. **Force Logout** logs out all selected users. It allows users sixty seconds to close out of their work in HeadMaster.

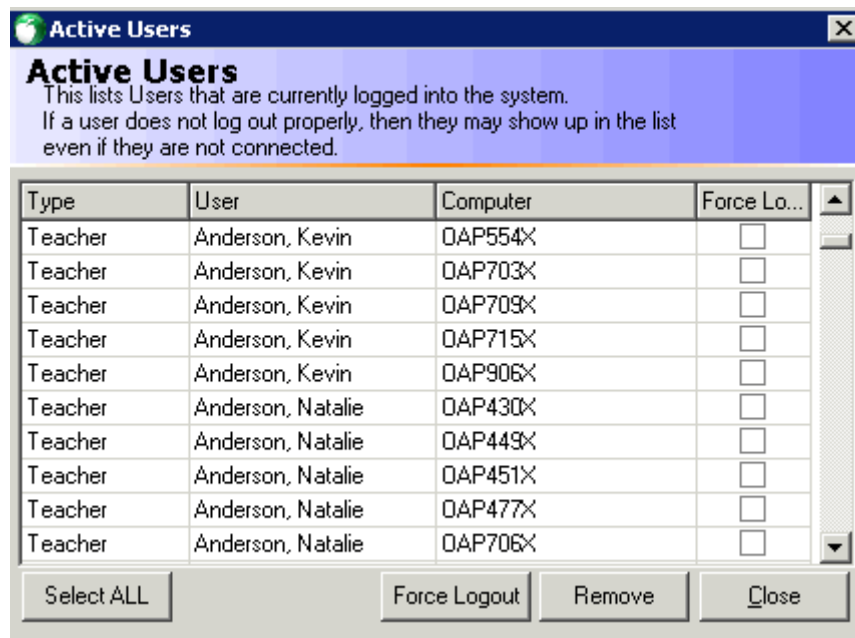



Figure 16: Active Users window

To access the HeadMaster Utility Manager:




Useful Information

The steps listed below are for desktop users. These steps may vary depending on your version of Windows.

HeadMaster OnDemand users double-click the **HM Utilities** icon in the OnDemand window. Then start at step 5.

1. Click **Start**.
2. Select **All Programs**.
3. Select **HeadMaster**.
4. Select **Utility Manager**.
5. Enter **Username** and **Password**.
6. Click **OK**.



Useful Information

You must have Administrator rights to access the Utility Manager.

The Utility Manager window appears. To access any of the functions, click the appropriate button.

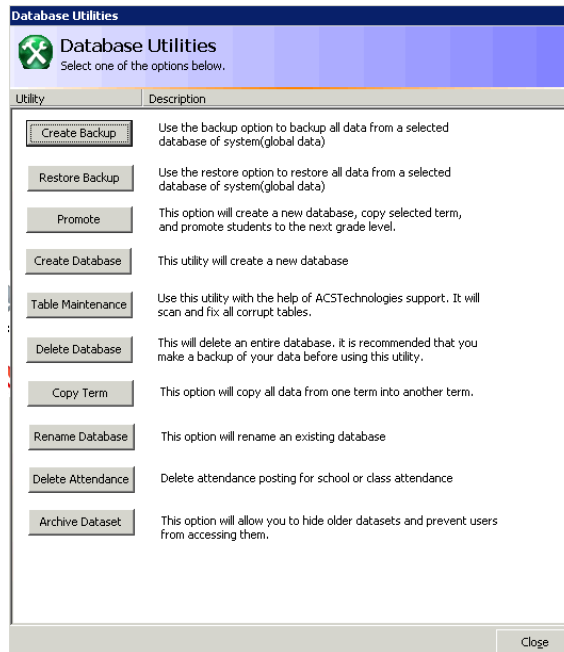


Figure 17: HeadMaster Utilities

- **Create Backup:** this function allows you to create a full back up of all of your HeadMaster data and save it where ever you want. This is not required for HeadMaster OnDemand users.

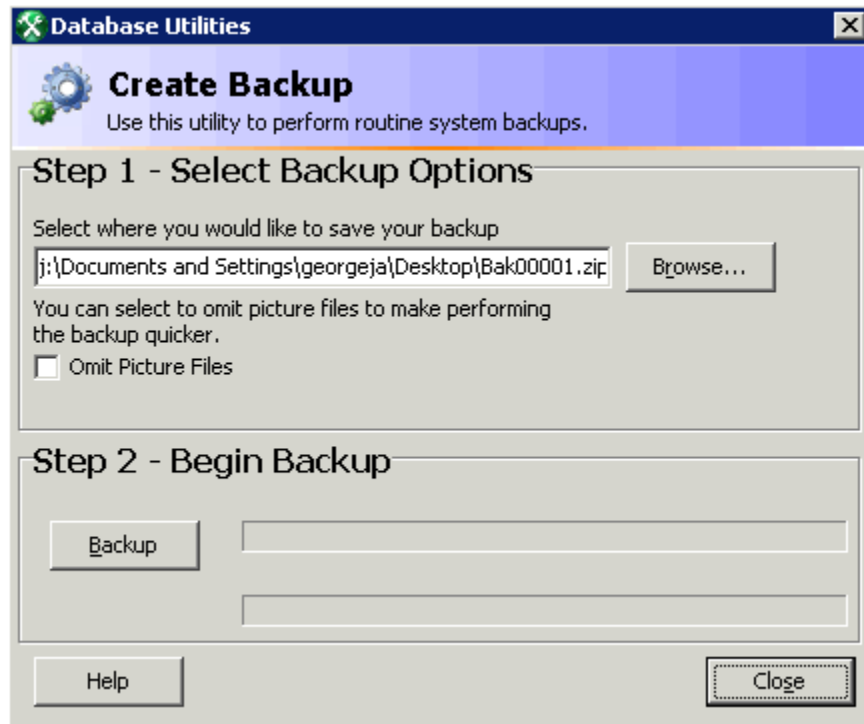


Figure 18: Creating a Backup

- **Restore Backup:** this function allows you to restore a previously saved back up.

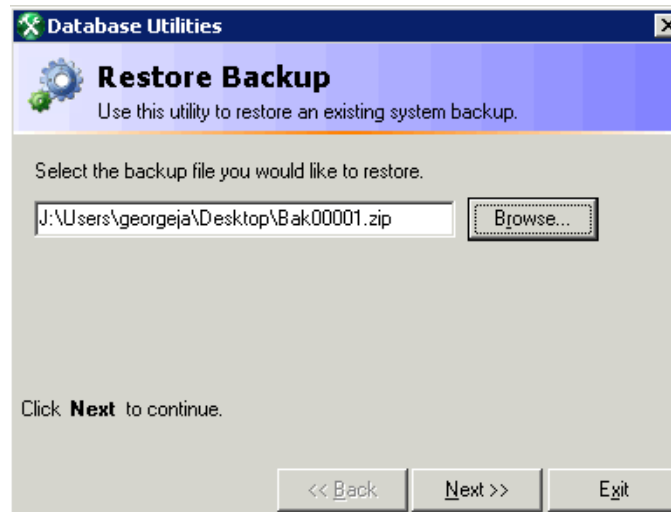


Figure 19: Restoring a Backup

- **Promote:** this function allows you to create a new dataset and move each student to the next grade level. This also allows you to move your graduating students to Alumni.

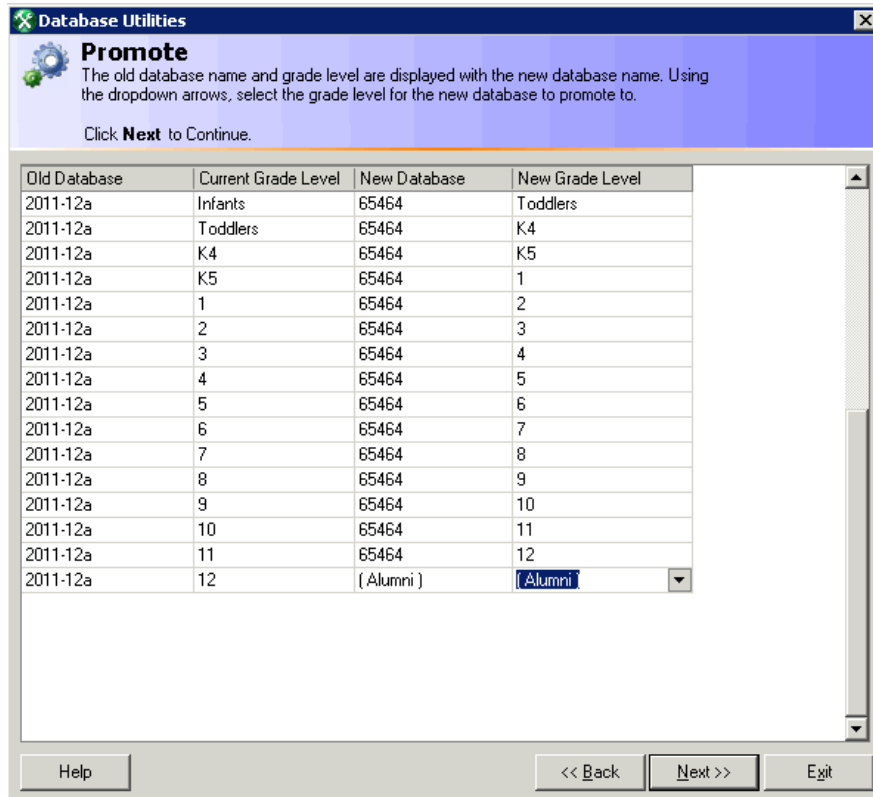


Figure 20: Promotion

- **Create Database:** this function allows you to create a new database. For example, you have a Preschool and a K-12 School and you want to keep the two schools separate.

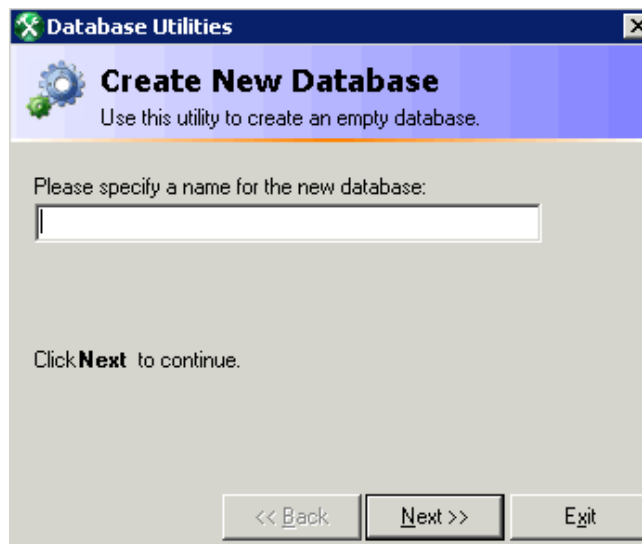


Figure 21: Creating a new Database

- **Table Maintenance:** If you are experiencing an error, you can run Table Maintenance to attempt to fix the error.

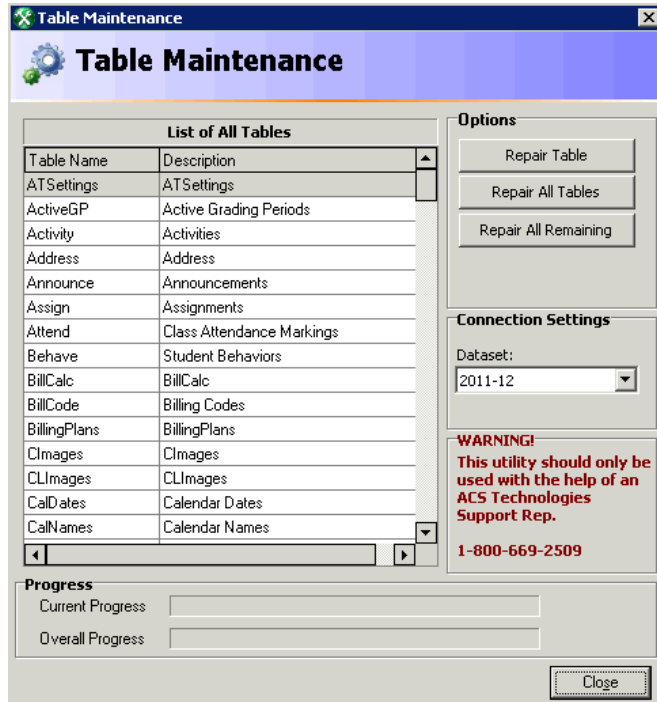


Figure 22: Table Maintenance

- **Delete Database:** If necessary, you can delete a database.

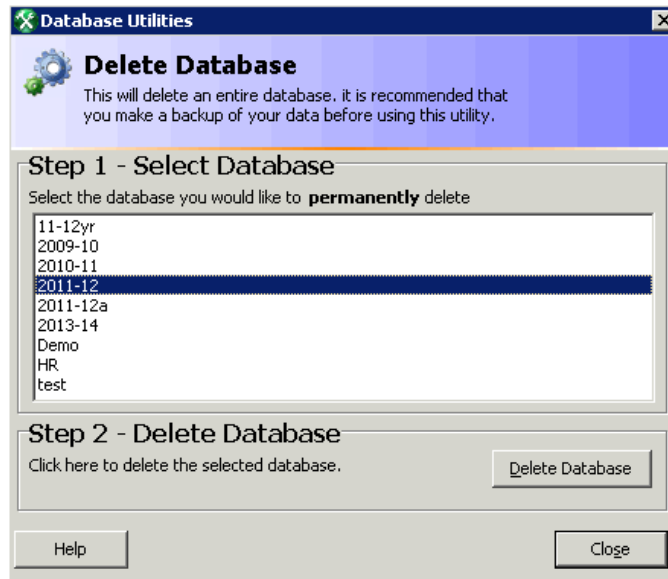


Figure 23: Delete a Database

- **Copy Term:** If you want to test something, you can copy your existing data and test on it without disturbing your current data.

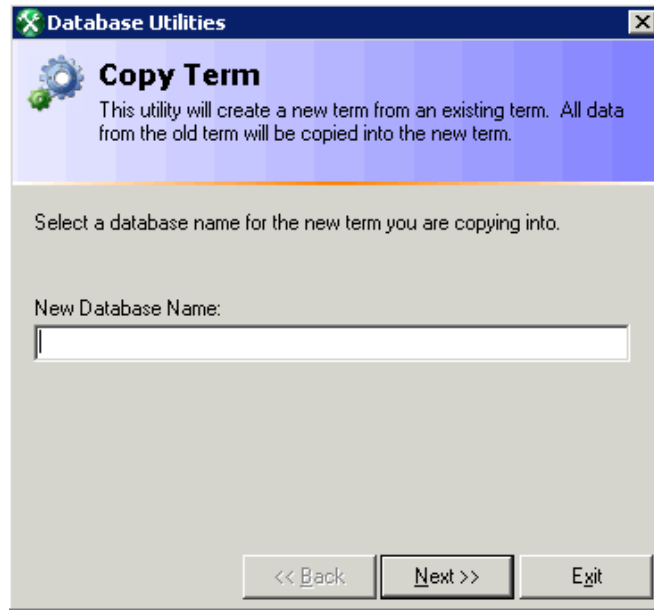


Figure 24: Copy Term

- **Rename Database:** when you first use HeadMaster, you will be using the School dataset. By using the Rename Database tool, you can change it from School to the current school year.

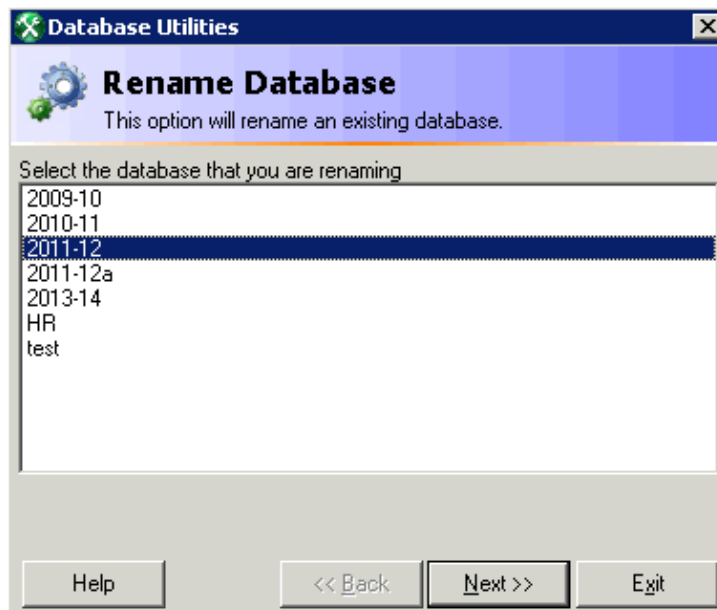


Figure 25: Rename Database

- **Delete Attendance:** if needed, you can delete attendance from previous years.

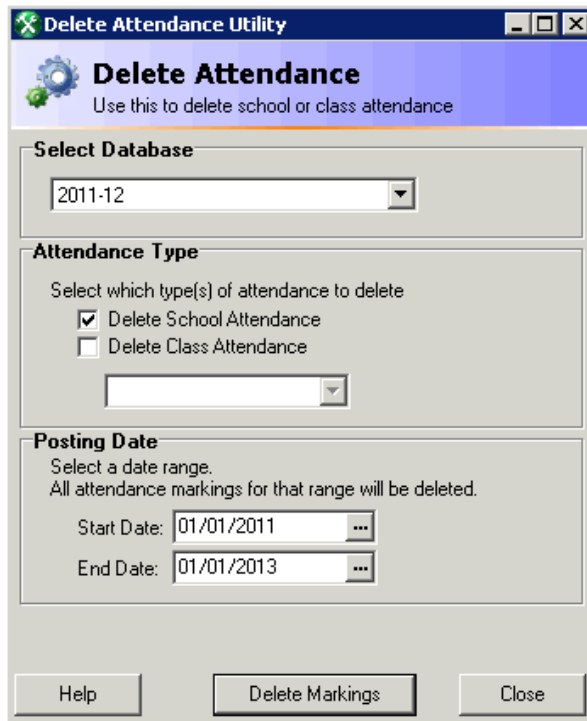


Figure 26: Deleting Attendance

- **Archive Dataset:** to shorten the list of datasets to select from when signing in to HeadMaster, you can archive older datasets that you do not need.

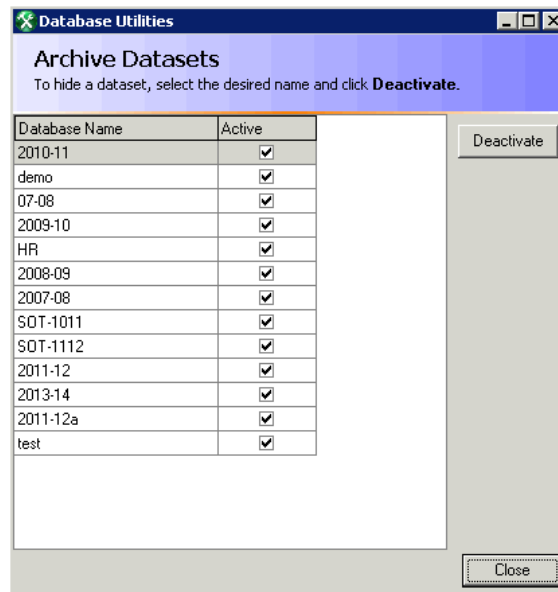


Figure 27: Archive Datasets