AIM Montana Edition

October 2008

User Guide

Objectives:

Navigation

Student Information

Census

System Administration

File Upload

This user guide was developed and produced by Infinite Campus for AIM Montana Edition users.

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Table of Contents

Introduction

This user guide provides information on the AIM Montana Edition of the Infinite Campus product in all core areas trained during the implementation.

Documentation

All documentation related to the AIM Montana Edition is available from the Customer Support Portal (http://support.infinitecampus.com) for easy access and distribution among the district's users. Related documentation is also available from the Help Index within Campus. Reference materials and other related documentation are included with this manual.

Software Support

Contact the school district's Infinite Campus Support Contact if additional assistance is needed. See the Support Process Guide for more information.

Hardware Requirements

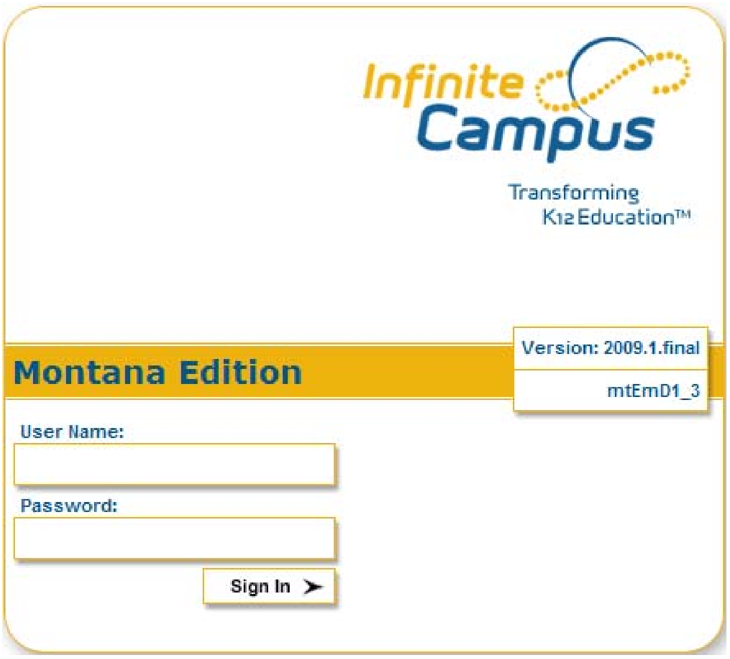
The tasks mentioned in this user guide may be performed on either a PC or a Macintosh. Please see the Supported Platforms technical reference for specific requirements.

Chapter 1 – Navigation

This chapter provides information on how to access, log in, log off, navigate, and search for data in Campus.

Accessing and Logging In

Each district's data is stored in a separate database on secure servers located within the State of Montana's Department of Administration facility. These servers offer multiple levels of security and protection including browser level encryption and password protected authorization. This allows only authorized users to access the system through a Web browser.



AIM Montana Edition is a web-based product. The data within the system is protected by using secure login credentials.

Campus recommends the use of "strong" passwords. A strong password is at least eight characters in length with a combination of letters, numbers or special characters.

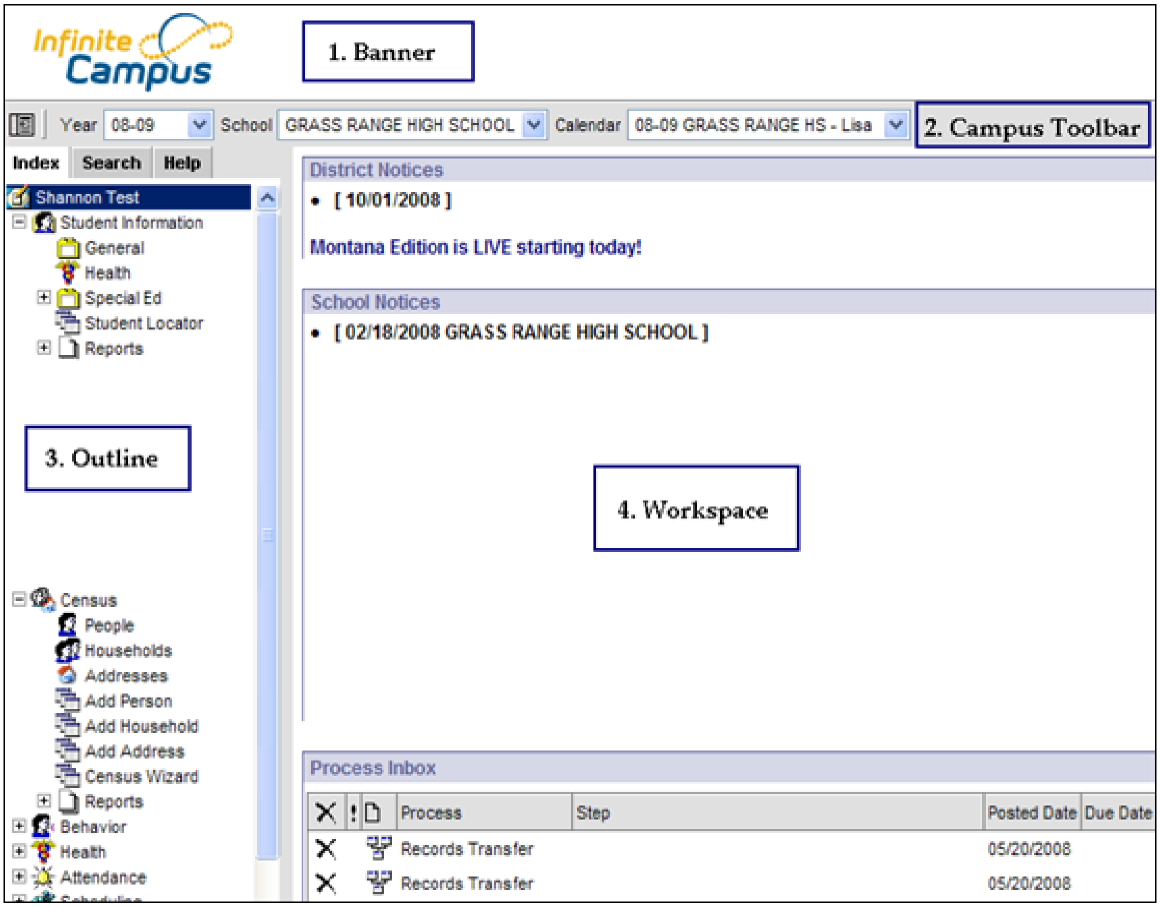
Entering a password incorrectly five times will result in the user's account being disabled. Contact the district's System Administrator to have your password reset.

Instructions to access the Campus Application

1. Launch a web browser.
2. Enter the web address (URL) provided by Campus.
3. When the page loads, your screen will display the log in screen for the AIM Montana Edition.
4. Enter the **User Name** and **Password**.
5. Click **Sign In** button.

Introduction to Infinite Campus Montana Edition

The Campus homepage is divided into four main areas – Banner, Campus Toolbar, Outline and Workspace. The content displayed is dependent on the user's level of access.



Navigation Tools

The four main areas of Campus include information and tools to assist in the navigation and use of the application.

1. **Banner**
   The **Banner** displays the Infinite Campus logo. The banner may be hidden from view by selecting the Hide Banner checkbox on the Account Settings tool located in the Outline.
   Path: Index > Account Settings

2. **Campus Toolbar**
   The gray header, referred to as the **Campus Toolbar**, includes Year, School, Calendar, Schedule and/or Section dropdown lists used in navigation. The setup of the district's

system and the user's level of access will determine the dropdown lists available from the Campus toolbar.

- The **Year** dropdown list includes all school years (e.g., historical, current and/or future) to which the user has access in the system.
- The **School** dropdown list includes all of the schools to which the user has access in the system.
- The **Calendar** dropdown list includes all calendars set up for a particular school. This list is available only if a selected school has more than one calendar. Calendars define the grade levels, terms, periods and instructional days for a specific school year and group of students.
- The **Schedule** dropdown list is available if a group of students enrolled in the same calendar follow a different meeting pattern (e.g., different terms dates, period times, and/or instructional days).
- The **Section** dropdown list is available to users assigned as a teacher to one or more course sections.

3. **Outline**
The Outline, located on the left of the browser, displays Campus information and tools. The Outline consists of three tabs: **Index**, **Search** and **Help**.

- The **Index** tab contains the modules and tools available to a user based on the rights and responsibilities established by the System Administrator. Tools are organized into groups called modules. To open a module, click either the plus sign or the name of the module.
- The **Search** tab is used to quickly find information, such as student, staff, census or help data. In addition, the user may use the advanced search capabilities by selecting the **Advanced Search** link.
- The **Help** tab provides Campus articles related to the tool currently displayed on the Workspace.

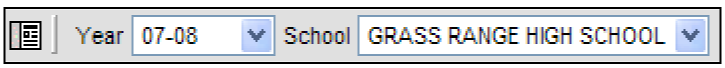
4. **Workspace**
The Workspace includes notices, important announcements and reminders posted by the district. The Process Inbox serves as a Campus "to do" list. The Tool selected from the **Index** in the **Outline** will load into the user's **Workspace**.

Navigation of the Montana Edition

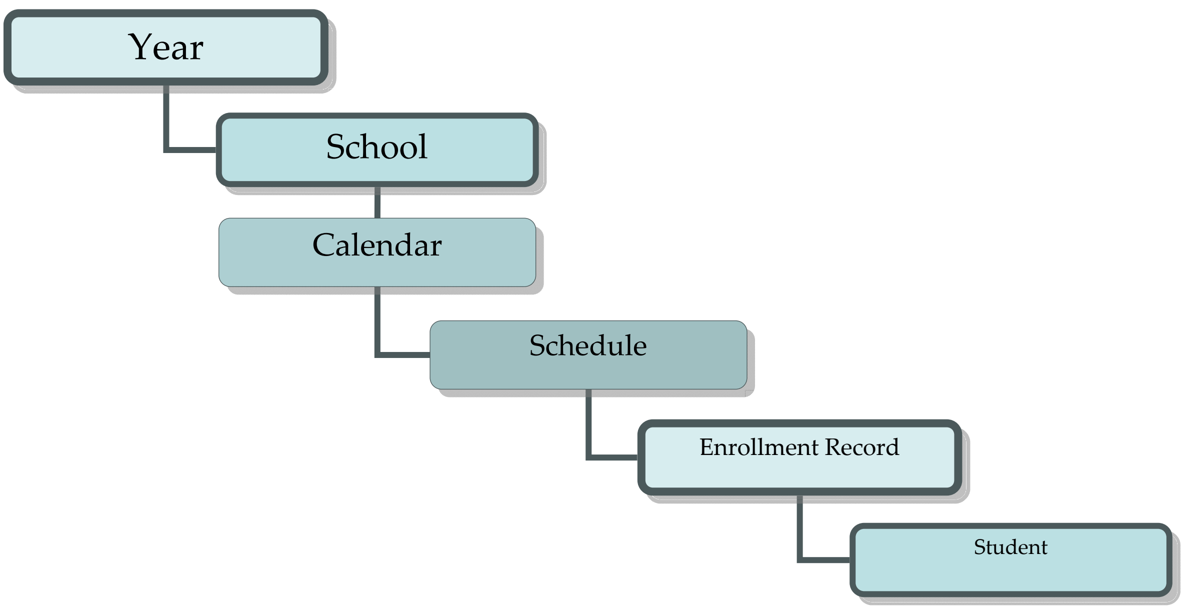
Upon logging in to the AIM Montana Edition, the Campus Toolbar provides dropdown lists dependent on what information is accessible to the user. The display of the Campus Toolbar varies depending on the district's set up in the AIM Montana Edition. The basic set up of the AIM Montana Edition has one calendar per school. Additional options include schools with multiple calendars and/or multiple schedules.

One Calendar per School

Select the current **Year** from the dropdown list to view and modify data for this school year. To find information about students enrolled in a particular school select the appropriate school from the **School** dropdown list.



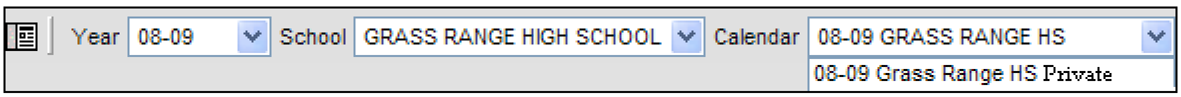
Calendar information is the basis for all student-related data. The diagram below represents how data in the Montana Edition database is connected.



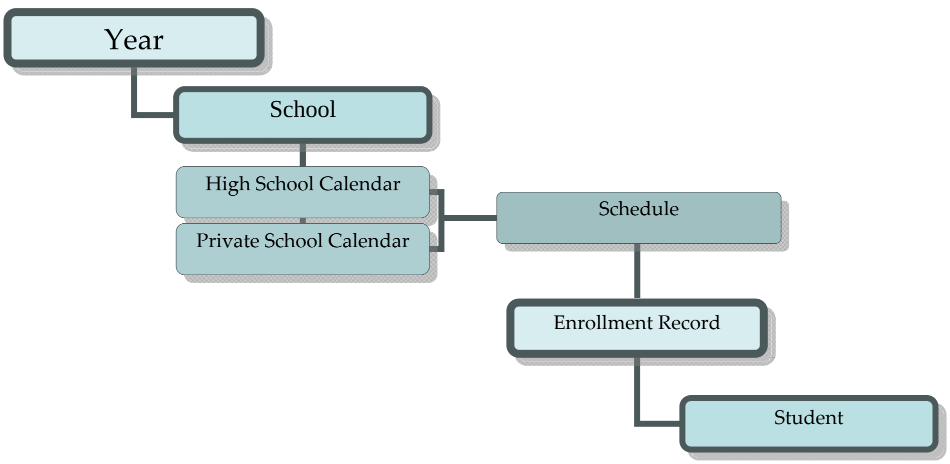
A student has an Enrollment Record attached to a schedule. In the basic set up of the Montana Edition this is referred to as the **Main** schedule. The **Main** schedule is connected to a **Calendar** that is set up for each **School**. The **School** information is connected to the selected **Year** in the **Campus Toolbar** dropdown list.

Multiple Calendars per School

Select the current **Year** from the dropdown list to view and modify data for this school year. To find information about students enrolled in a particular school select the appropriate school from the **School** dropdown list. If a school has more than one calendar (e.g., a regular high school calendar and a separate calendar to for tracking private school students who receive special education services from the Public school while attending a Private school) the **Calendar** dropdown list will display.



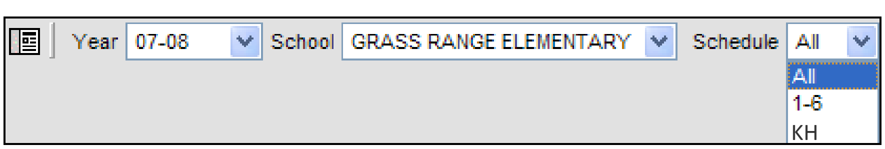
The diagram below represents how data in the Montana Edition database is connected if there are multiple calendars set up.



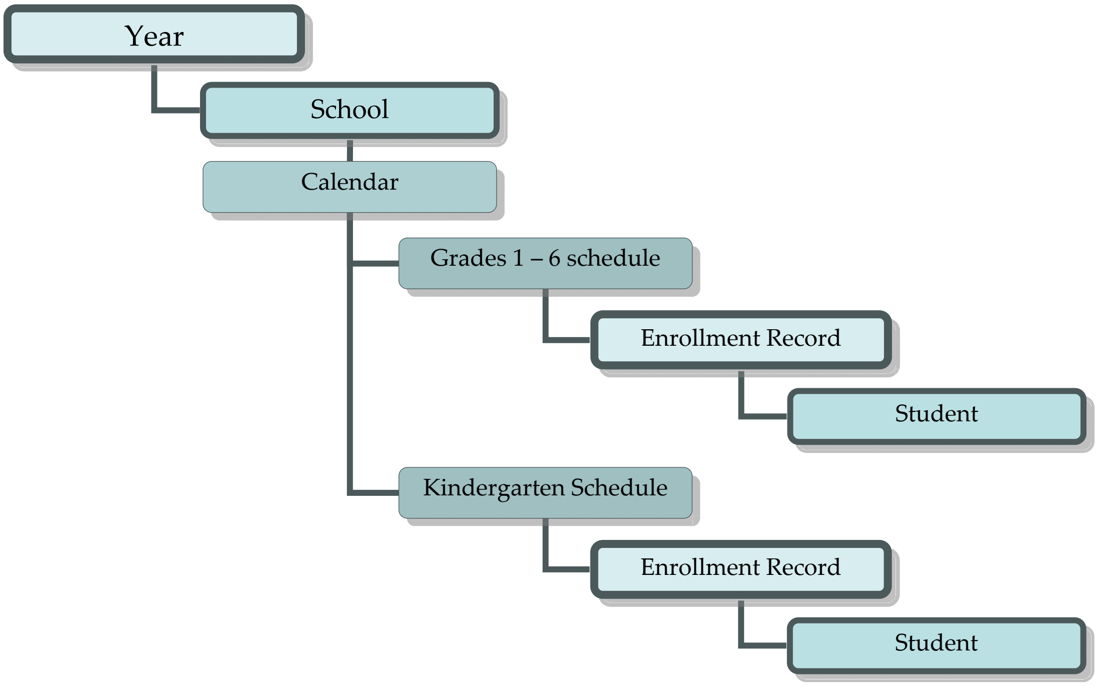
A student has an Enrollment Record attached to a **Main** schedule. The **Main** schedule is connected to one of the **Calendars** set up for a **School**. The **School** information is connected to the selected **Year** in the **Campus Toolbar** dropdown list.

Multiple Schedules per Calendar

Select the current **Year** from the dropdown list to view and modify data for this school year. To find information about students enrolled in a particular school select the appropriate school from the **School** dropdown list. If a school has more than one calendar the **Calendar** dropdown list will display; otherwise the system will default to the only calendar attached to the selected school. If a calendar has more than one schedule (i.e. Main schedule and a separate Schedule for half-day kindergarten students) the **Schedule** dropdown list will display.

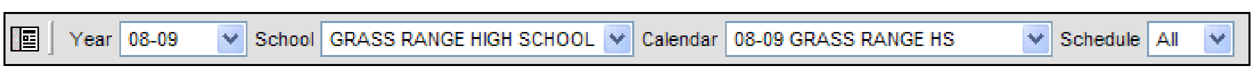


The diagram below represents how data in the Montana Edition database is connected if there are multiple schedules set up.



A student has an **Enrollment Record** attached to a selected **Schedule**. Each schedule is connected to a **Calendar** set up for a **School**. The **School** information is connected to the selected **Year** in the **Campus Toolbar** dropdown list.

Student data is tied to an **Enrollment Record** determined by the selected **Schedule**. The student's **Schedule** is tied to a selected **Calendar** that is tied to the selected **School**. The **School** information is tied to the selected **Year**.



Understanding the connections in the database will assist user navigation and in searching for specific student data in the Montana Edition.

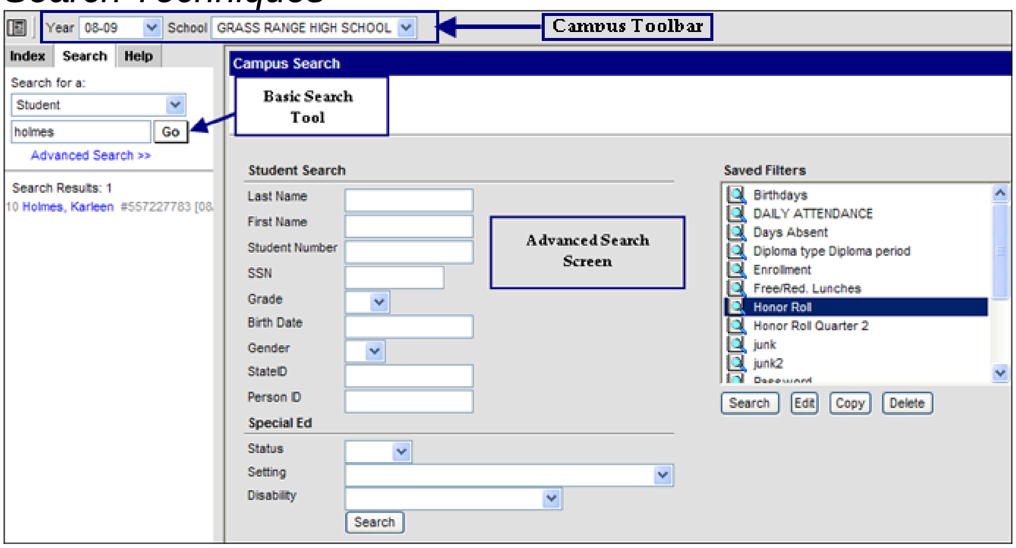
Additional information is provided in the Calendar Administration User Guide available on the Campus Support Portal and in Chapter 5 System Administration of this User Guide.

Searching in Campus

Campus Search allows a user to search by a specific data type. Each data type allows for basic and advanced searches. Some data types allow wildcard searches. The data types in the dropdown list are limited by the user's Tool Rights. To narrow the search to a specific set of student data first select the appropriate items from the Campus Toolbar.

NOTE: All People, Address, Household, User, Group, and Help search the entire database regardless of the Campus Toolbar selections.

Search Techniques



1. **Basic Search Tool** allows for searching a specific data type quickly by leaving the field blank or by entering partial information (e.g., Last Name for a student only). Some data types require partial search criteria (e.g., 3 characters minimum when searching for a household).

2. **Advanced Search Screen** provides additional options to narrow down the Search results. Search criteria options vary based on the data type selected from the dropdown list on the **Search** tab. To begin an advanced search, select the Advanced Search link**.** Three options for conducting an advanced search include, **Criteria Search**, **Saved Filter Search**, or **Combined Search**.

   - **Criteria Search –** this type of **Advanced Search** allows the user to narrow down the search results displayed based on known information entered into the search fields. Depending on the data type selected, the fields available for a **Criteria Search** will vary. Refer to the Searching Campus User Reference available on the Customer Portal for a listing of all fields and definitions of the search criteria for each data type.

Instructions to conduct a Criteria Search

1. Select the data type from the **Search** tab in the **Outline.**
2. Select the **Advanced Search** link.
3. Enter the criteria in the appropriate **Search** fields.
4. Select the **Search** button located below the **Search** fields.
5. Search results will display in the **Outline** under the **Search** tab.

- **Saved Filter Search –** this type of **Advanced Search** allows the user to search for data based on predefined filters. **Saved Filters** are set up in the Ad Hoc Reporting module. A user will only have access to filters saved to their user group.

Instructions to conduct a Saved Filter Search

1. Select the data type from the **Search** tab in the **Outline.**
2. Select the **Advanced Search** link.
3. Select the appropriate **Filter** from the **Saved Filters** list.
4. Select the **Search** button located below the **Saved Filters** list box.
5. Search results will display in the **Outline** under the **Search** tab.

- **Combined Search** – this type of **Advanced Search** allows the user to combine a Criteria Search and a Saved Filter Search. This returns a subset of data based the selections entered. **Note: It is important to use the Search button located underneath the Criteria Search Options for a combined search to function properly.**

Instructions to conduct a Combined Search

1. Select the data type from the **Search** tab in the **Outline.**
2. Select the **Advanced Search** link.
3. Select the appropriate **Filter** from the **Saved Filters** list.
4. Enter the criteria in the appropriate **Search** fields.
5. Select the **Search** button located below the **Search** fields.
6. Search results will display in the **Outline** under the **Search** tab.

3. **Wildcard Searches** use special characters to search for data if some of the search criteria needed is unknown. The following wildcard characters are available for use when searching for information in Campus. Numeric data types do not allow wildcard searches (e.g., State ID).

- **Single-Character Wildcard** – The _ (underscore) is a 1 character wildcard search. The underscore replaces one character in the search criteria. For example, searching for "Peters_n" will find students or people with the last names Peterson and Petersen.

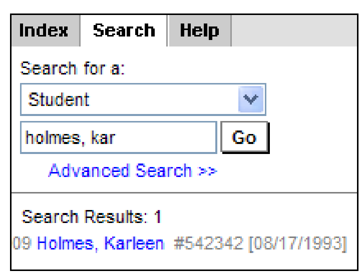
- **Multiple character Wildcard –** The **%** (percent) is a multiple character wildcard. The percentage symbol (%) replaces multiple characters in the search criteria. For example, searching for P%n as the last name will return all results starting with a P and ending with an n, such as "Pearson", "Peterson" and "Petersen".

Searching by Selected Data Types in Campus

Montana edition provides the ability to search for information based on ten different data types. A user may select a data type from the dropdown list to perform a Basic Search or use Advanced Search options. Results displayed in the **Outline** are based on the data type and search criteria entered.

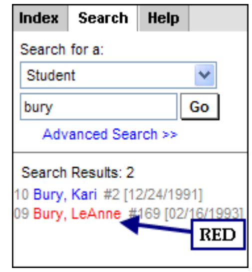
To assist in searching for specific data types the following icons display in the **Outline**.

Icon	Description
	A **Person** that is stored in the database. This icon only displays on household, people, and user searches.
	A **Student** is defined by an enrollment record. This icon only displays on household, people, and user searches.
	A **Staff** person is defined by a district assignment to a particular school. This icon displays on household, people, staff and user searches.
	A **Guardian** is defined by a relationship between a student and a person. This icon only displays on household searches.
	A **Household** is a family unit containing members and an address. This icon only displays on household searches.
	An **Address** that is attached to a household. This icon only displays on household searches.
	An **Address** that is stored in the database, not yet attached to a household. This icon only displays on address searches.

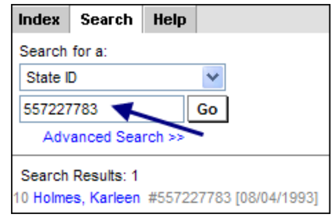


1. **Student**
   A student is a person who has an enrollment record in a calendar of a specific school in one or more school years. Searching for a student is limited to those enrolled in the school and year selected from the Campus Toolbar.

   - **Basic Search** – To search for a student, enter his/her last and first name (e.g., Johnson, Sarah), then click **Go**. The user may enter a portion of the student's last or first name. If conducting a first name search, precede the name with a comma.

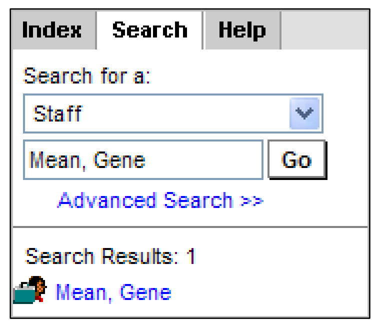


- **Advanced Search** – To enter or limit the Student search to specific criteria, select the **Advanced Search** link.
- **Displayed Search Results** – The search results display each student's grade level, last name, first name, student number (e.g., Local ID) and birth date. Students who are actively enrolled as of today's date will display in blue text and students who are not actively enrolled (e.g., have dropped or not yet started school) will display in red text.



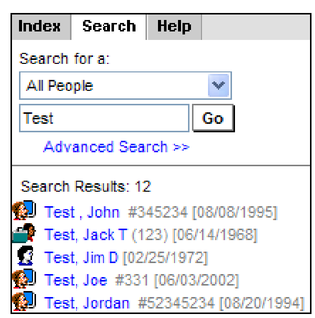
2. **State ID**—Represents a student's unique state-wide student identifier.

- **Basic Search –** To search for a student based on State ID, enter the unique number for a particular student and click **Go**. The entire State ID must be entered for results to display.
- **Advanced Search** – To enter additional student information, select the Advanced Search link.
- **Displayed Search Results** – The search results display each student's grade level, last name, first name, student number (e.g., Local ID) and birth date.



3. **Staff** – In Campus, a person becomes a staff member by having a district assignment to a particular school. Searching for a staff member is limited to staff assigned to the school selected from the Campus toolbar.

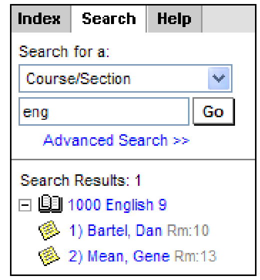
- **Basic Search** – To search for a staff member, enter their last name, first name or staff number, and Click **Go**. The user may enter only the staff member's last or first name. If conducting a first name search precede the name with comma.
- **Advanced Search** – To enter or limit the Staff Member search to specific criteria, select the Advanced Search link.
- **Displayed Search Results** – The search results display each staff member's last and first name.



4. **All People**—Any person who has been entered into the district's database can be found in **All People**. This includes parents, students, siblings, staff members, emergency contacts, etc. The entire Campus database, independent of the school and year selected from the Campus Toolbar, is searched when selecting the **All People** data type from the dropdown list on the **Search** tab.

- **Basic Search** –To search for a person enter all or part of the last name, first name and Click **Go**. If conducting a first name search, precede the name with a comma.

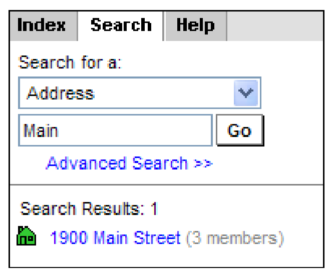
- **Advanced Search** – To enter or limit the All People search to specific criteria, select the Advanced Search link.
- **Displayed Search Results** – The search results display each person's last name and first name. If the person is a student, his/her grade level, student number (e.g., Local ID) and birth date will also display. Searching by a common last name will result in many results; Campus recommends limiting All People searches as much as possible.



5. **Course/Section**—A course represents the delivered curriculum, such as 6th Grade Reading or AP U.S. History. A section represents a group of students assigned to a specific teacher at a defined time and place. Searching for a course or section is dependent on the year and school selected from the Campus toolbar.

- **Basic Search** – To search for a course, enter the course number or name then Click Go. The user may choose to only enter the course number or part of the course name (e.g., "Eng" to represent "English 9").
- **Advanced Search** – To enter or limit the Course/Section search to specific criteria select the Advanced Search link.
- **Displayed Search Results** – The search results display the course number, name, sections, section numbers, last name and first name of the teacher and room number assigned to a section. A course will display as a blue link if the course is active in the current year. If the course is not active in the current year, it will display as a red link in the search results.

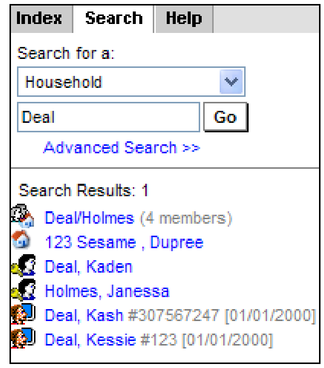
6. **Course Master** – a Course Master search is not applicable in the AIM Montana Edition.



7. **Address**—In Campus, an address represents a data type that is linked to a household. To search for an address, select the **Address** data type from the dropdown list on the **Search** tab. The **Address** data type searches the entire district database, independent of the school and year selected from the Campus Toolbar.

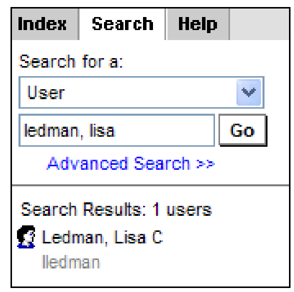
- **Basic Search** – To search for an address, enter the address number or street name and click **Go**. The user may enter part of the address number or street name.
- **Advanced Search** – To enter or limit the Address search to specific criteria, select the Advanced Search link.
- **Displayed Search Results** – The search results display the P.O. Box or street number, street name and number of members linked to the displayed address.

8. **Household**—A household is a family unit that is linked to an address (the family's location and mailing address) and members.



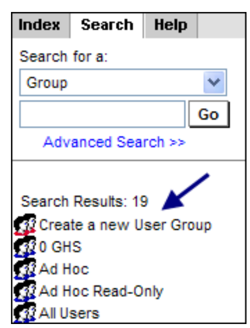
- **Basic Search** – To search for a **Household**, enter the household name, address or member information, then click **Go**. The user must enter a minimum of three characters to display any results.
- **Advanced Search** – To enter or limit the **Household** search to specific criteria, select the Advanced Search link.
- **Displayed Search Results –** The search results display the household name, address, and members.

9. **User**—A user is a person who has an account (e.g., user name and password) to either the Campus application or the Campus Portal. All people in the Campus database are potential users of the system. Searching for a **User** may be limited to one or more schools, depending on a person's level of access.



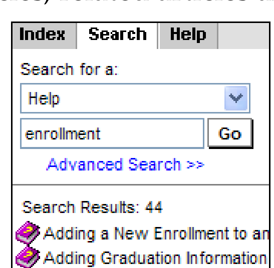
- **Basic Search** – To search for a **User**, enter the last and first name, then click **Go**. The user may enter the person's last or first name. If conducting a first name search, precede the name with a comma.
- **Advanced Search** – To enter or limit the **User** search to specific criteria or to search for a user based on their access to specific tools, select the Advanced Search link.
- **Displayed Search Results** – The search results display each user's last name, first name, and user name, if established.

10. **Group**—A **Group** defines user access to a set of tools or calendars. Refer to Chapter 5 System Administration, for more information on groups.



- **Basic Search** – To search for a **Group**, select **Group** from the search dropdown list and click **Go**. All groups will display in the search results.
- **Advanced Search** – Advanced Search capabilities for **Groups** are not available.
- **Displayed Search Results** – The search results display the tool that allows the user to create a new user group, and the full list of tool and calendar groups set up in the database.

11. **Help**—The **Help** text built into the product can be searched by articles, related articles and links.

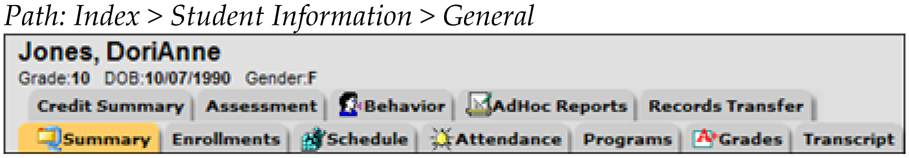


- **Basic Search** – To search for specific **Help** text, enter a keyword (e.g., enrollment) and click **Go**. All help articles assigned to the keyword will display. To return relevant results enter a word that represents a specific Campus module or tool.
- **Advanced Search** – Advanced Search capabilities for help include the ability to search help articles, documentation/tutorials (e.g., related articles or links) and custom articles set up by district staff.
- **Displayed Search Results** – The search results display all of the help articles that represent the keyword entered in the **Search** box.

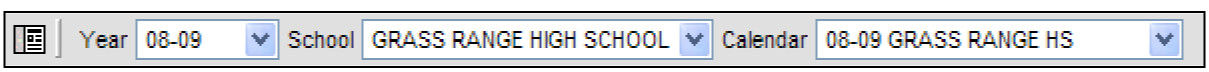
Navigating Student Information

Data in the Student Information module is based on being enrolled in a specific school as defined by the calendar and schedule structure. The AIM Montana Edition includes several student information tabs. The tabs that will be presented in this User Guide represent those pertinent to Montana state reporting.

Path: Index > Student Information > General



To access current year information for a student select the current Year, School, Calendar and/or Schedule from the toolbar.



Instructions to access Student Information

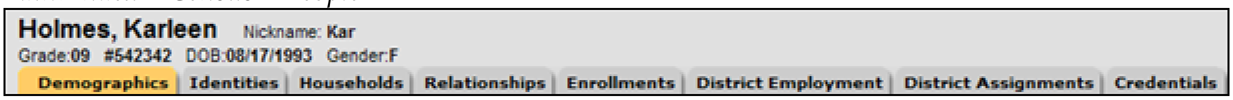
1. Expand the Student Information module by clicking on either the name link or the plus sign.
2. Select the **General** link in the **Outline**.
3. Search for a student.
4. Select a student.

The Student Information General toolset is subdivided into separate tabs for commonly used information. Users will have access to specific tabs in this toolset based on their role in the district and/or school. Refer to Chapter 2 – Student Information for more information about the contents of tabs needed for state reporting.

Navigating Census Information

Data in the Census module is based on information required for all people entered into the Montana Edition. The Montana Edition includes several Census tabs that contain needed data for students, guardians, emergency contacts, service providers, and staff. The tabs are explained in detail in Chapter 3 – Census.

Path: Index > Census > People



Census information is independent of the year, school, calendar and/or schedule selections made on the Campus Toolbar. Census Information is district-wide.

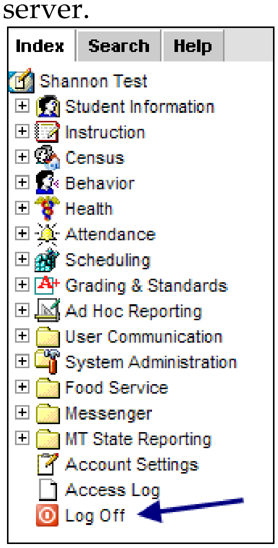
Instructions to access Person Information

1. Expand the Census module by clicking on either the name link or the plus sign.
2. Select the **People** link in the **Outline**.
3. Search for a person using last name, first name.
4. Click **Go**.
5. Select the person's link from the outline to load the Person tabs in the Workspace.

NOTE: Being able to navigate between a student's census information and student information is an important skill to master.

Logging Off Campus

The Log Off tool should be used to exit the AIM Montana Edition application. **NOTE: If the user leaves their computer for a defined length (e.g., 60 minutes) of time the session will be automatically end and will not save the user's work.** Logging off Campus ends the session on the server.



Path: Index > Log Off

Instructions to Log Off Campus

1. Click Save on the tool loaded in the **Workspace**
2. Select the **Index** tab in the **Outline**.
3. Select **Log Off** at the bottom of the **Index**.

Chapter 2 – Student Information

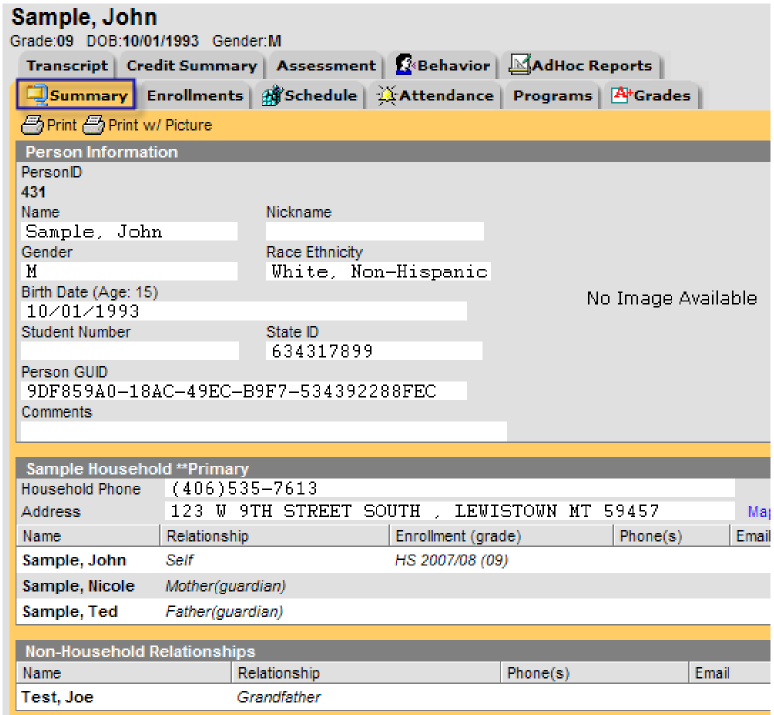
This chapter provides information on specific student information tabs that are pertinent to Montana state reporting information.

The Summary Tab

The **Summary** tab is a read-only display of the data that was created for the student in the Census module. There are two print options on the Summary tab: Print and Print with Picture. Print with Picture is a distinct user right. Depending on the user's rights, the ability to print the student's summary tab information will determine if the student's picture will print or not.

Path: Index > Student Information > General > Summary

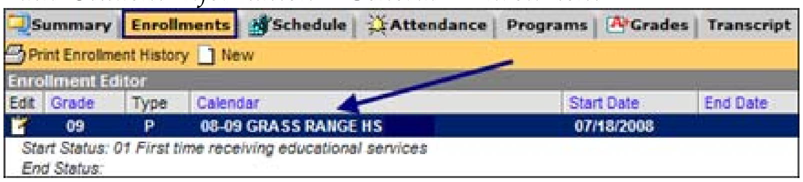
- The **Person Information** section includes person identification information for the selected student.
- The **Mailing Addresses** section displays all addresses for this student marked as receiving mailing in the Census module.
- The **Household** section displays all addresses attached to this household including mailing and physical address information. The household phone number, relationships established with the student, and contact information for each member of the household is displayed in this section.
- The **Non-Household Relationships** section includes contact information for all people connected to this student through a non-household relationship such as an emergency contact.



The Enrollment Tab

The **Enrollment** tab lists all enrollment records for the selected student. A majority of the state reporting data is stored within a selected enrollment record. To view this information, click on an enrollment record listed in the **Enrollment Editor**.

Path: Student Information > General > Enrollment

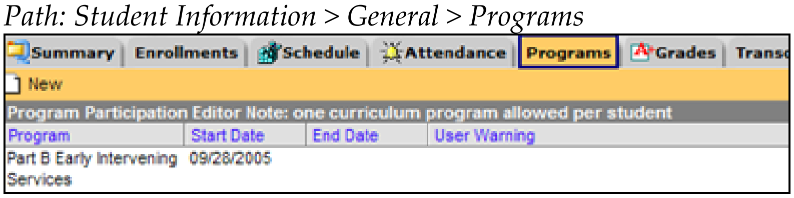


The selected enrollment record includes General Enrollment Information, Graduation, State Reporting Fields, CTE Concentrator, and Special Education Fields.

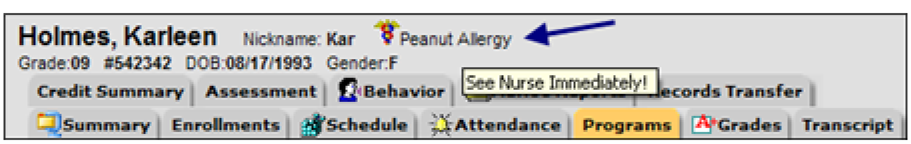
The Programs Tab

The **Programs** tab includes information on programs monitored by the State of Montana (e.g., Job Corp and Part B Early Intervening Services). Please contact your district's System Administrator if an additional program is needed.

Path: Student Information > General > Programs

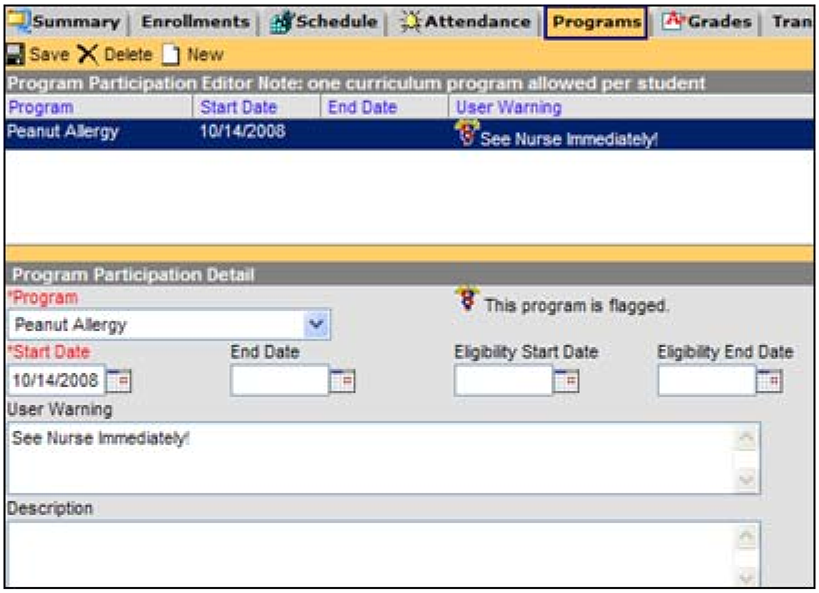


The **Programs** tab may be used to set up a "warning flag" for a student. A warning flag can be displayed next to a student's name above the tab information as an indicator that further action may be needed under certain circumstances.



For example, a student who has a peanut allergy may have a "warning flag" set on the programs tab so that an icon appears next to their name to inform the Campus user of this allergy. If the user hovers over the warning a message may display to indicate what action to take if this student is exposed to any peanut oils.

The **Program Participation Detail** editor contains the information needed to set up a program for a student. The programs available for selection include state reported programs as well as district created programs set up in System Administration. The User Warning text box information displays when a Campus user hovers over a flagged program next to the student's name. The description entered is only available to Campus users that have access to the Programs tab.



Chapter 3 – Census

This chapter provides information on how to create and maintain person, address and household data in Campus.

The Census Module

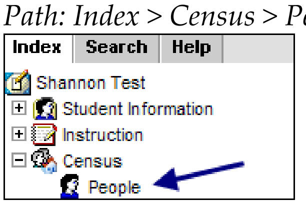
The Census module provides the entry point for all people who will be entered into the Campus database including students, staff, parents, service providers and emergency contacts. An individual's information is entered once in the Campus database. The records for that individual are used and modified as needed.

> Example – Melissa Smith was a student in a high school of a district, therefore a student record for Melissa exists in the Campus database. Melissa goes to college and becomes an elementary school teacher hired by the district. She teaches for a couple of years and then gets married. Her identity is changed in Campus to her married name; however, the previous name information is still linked to Melissa's records. Staff members who know Melissa by her maiden name will be able to search Campus and find Melissa by this name. When Melissa becomes a parent and her children attend school in the district, they will be linked to her through relationships made between her and her children. When her children grow up and have children of their own, Melissa can be marked as an emergency contact for her grandchildren.

Census Person Records

Person information is entered in the **People** section of Census. The **People** section includes several tabs where data is entered and maintained for district and state information. More or less information is entered on a person, depending on their role as a student, parent, staff member, service provider, emergency contact or other person tracked in Campus.

Path: Index > Census > People

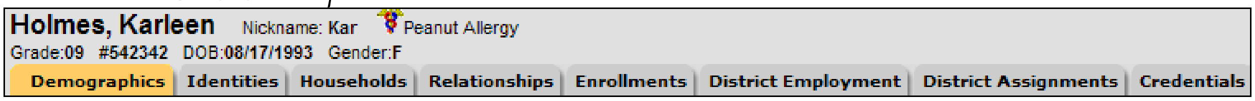


Instructions to access Person Information

1. Expand the Census module by clicking on either the name link or the plus sign.
2. Select the **People** link in the **Outline**.
3. Search for a person using last name, first name (e.g., Holmes, Karleen).
4. Click **Go**.
5. Select the person's link from the **Outline** to load the **Person** tabs in the **Workspace**.

People

Path: Index > Census > People

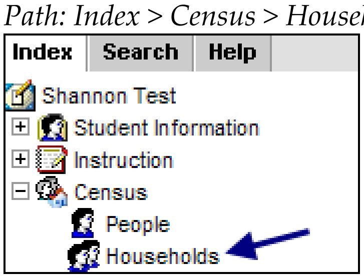


- **Demographics –** This tab lists all person, identifying and contact information for the selected person.
- **Identities –** This tab lists current and historical identification information for the selected person.
- **Households –** This tab lists all current and historical household memberships for the selected person.
- **Relationships –** This tab lists all current and historical relationships between the selected person and other people in the Campus database.
- **Enrollments** – This tab lists all schools in the district the selected person has attended as a student. The data located on this tab includes many of the state reporting elements in Campus.
- **District Employment –** This tab holds employment records for the selected person within a district. This data is used for reporting and data analysis.
- **District Assignments –** This tab lists current and historical schools that include relative data associated with the selected person and school assignment.
- **Credentials –** This tab lists current and historical records about the selected person's teaching credentials.

Census Household Records

Household information is entered in the **Households** section of Census. This section includes three tabs where data may be entered and maintained. Members and Addresses are linked to a Household defining a family unit.

Path: Index > Census > Households



Instructions to access Household information

1. Expand the Census module by clicking on either the name link or the plus sign.
2. Select the **Households** link in the outline.
3. Search for a household using the last name of a person who is a member of the household (minimum of three characters required to display results).
4. Click **Go**.
5. Select the **Household** link from the outline to load the Household Info tab in the Workspace.

Households

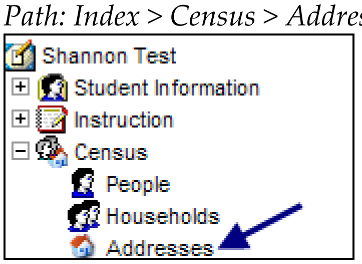
Path: Index > Census > Households > Household Info

- **Household Info –** This tab lists the household name and phone number. A user may change the household name and phone number from this tab.
- **Addresses –** This tab lists current and historical addresses associated with the selected household. A user may add or end addresses associated with the household from this tab.
- **Members** – This tab lists current and historical members of the household selected. A user may add or end memberships associated with the household from this tab.

Census Address Records

Address information is entered in the **Addresses** section of Census. This section includes three tabs where data may be entered and maintained. Households and Schools are linked to Address Info to establish mailing labels and boundaries.

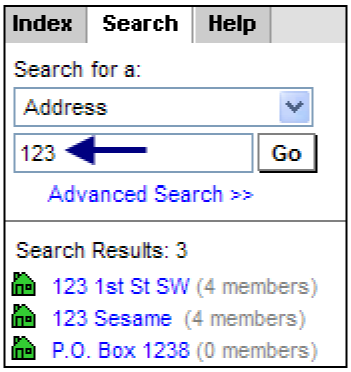
Path: Index > Census > Addresses



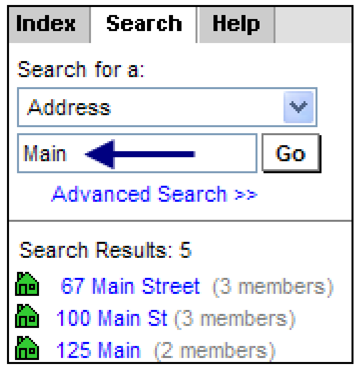
Instructions to Access Address information

1. Expand the Census module by clicking on either the name link or the plus sign.
2. Select the **Addresses** link in the outline.
3. Search for an Address using the P.O. Box number, street number, or street name.
4. Click **Go**.
5. Select the **Address** link from the outline to load the **Addresses** tab set in the **Workspace**.

Address number search

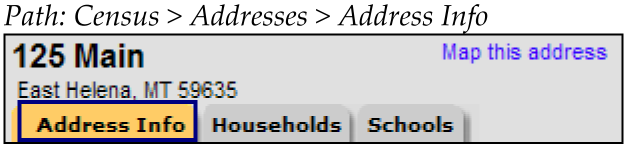


Address name search



Addresses

Path: Census > Addresses > Address Info



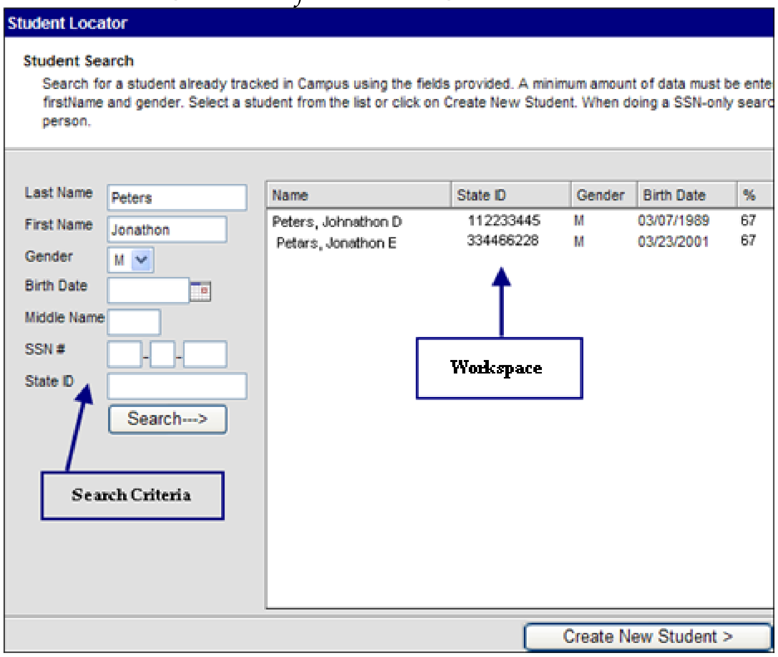
- **Map this address –** This link, located in the top-right corner of the Addresses section, opens a new window when selected. The location of this address will display on Google maps to assist the user in finding directions. If the address is a P.O. Box location, the Map this address link will not be available.
- **Address Info –** This tab lists the current detail address information for the selected address.
- **Households –** This tab lists current and historical households associated with the selected address. A user may add or end a household associated with this address from this tab.
- **Schools –** This tab lists current schools associated with this address if boundaries have been established in Campus.

Adding Census Information for New Families

New students are added to the AIM Montana Edition using the **Student Locator**. The Student Locator will be used to determine if a student has an existing state student ID number.

Student Locator

Path: Index > Student Information > Student Locator



When adding new students to the AIM Montana Edition database, it is critical to use the Student Locator. Using this tool will minimize the risk of duplicate students and IDs. The Student Locator searches the AIM State Edition to see if the student has an enrollment record elsewhere in the state.

In addition, a district-to-district records transfer may be used to copy student information from another district's database to your district's database, reducing re-entry.

The Student Locator uses NYSIIS search technology, a phonetic coding system that matches names based upon pronunciation, regardless of minor differences in spelling. The Last Name, First Name and Gender of a student must be entered to complete a search.

Example:
If the user enters: Last Name: Peterson, First Name: Jonathon and selects Male from the Gender dropdown list the results will display all student names, stored in the AIM State Edition database, that sound phonetically alike that match the gender selected such as:

- Petersen, Jonathon
- Petersen, Johnathon
- Peterson, Jonathon
- Peterson, Johnathon

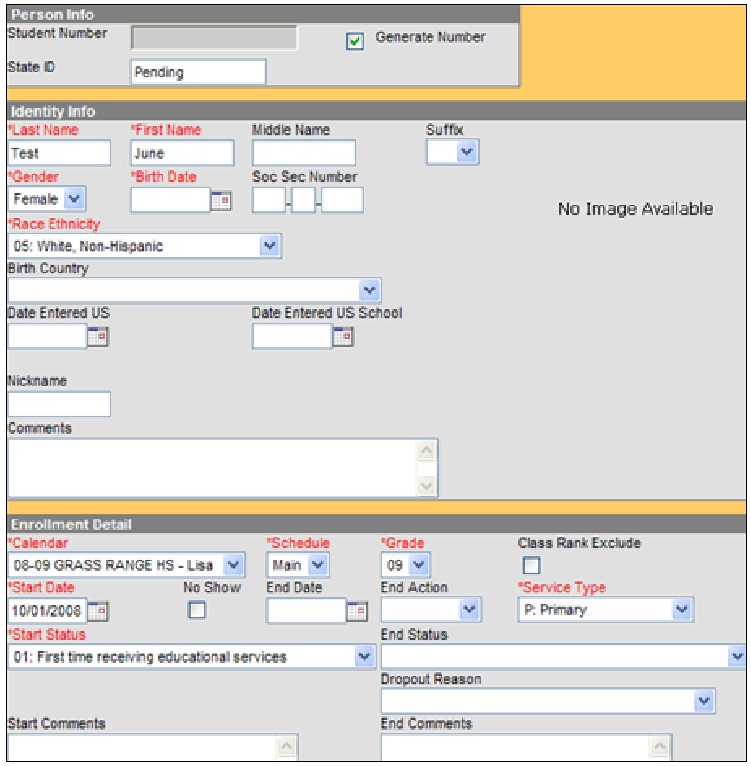
NOTE: The Student Locator successfully locates most entries. However, if a student is entered into the AIM State Edition (or the enrolling district is attempting to enroll the student) with a name other than their legal name (step-parent's last name, hyphenated last name, nickname, etc.) the Student Locator will not always return a match. If you know that a student has been previously enrolled in a Montana School District, try searching by other names used, nickname, etc.

Instructions for using the Student Locator

1. Expand the Student Information module in the Index tab of the outline.
2. Select the Student Locator link.
3. Enter the student's **First Name** and **Last Name**.
4. Select the **Gender** of the student.
5. Click **Search**.
6. All students who match this entry will display in the search results **Workspace** located directly to right of the search criteria.
7. Use the additional information provided in the search results Workspace (i.e., Birth Date, State ID and (%) Percentage) to determine if one of the students displayed is the student the user needs to enroll.
8. If the student has never been enrolled in a Montana school, click **Create New Student** and proceed to the next section of this document (*Adding a New Student*).
9. If the student is found using the Student Locator, proceed to the *Transferring a Student* section in this chapter.

If the student has been previously enrolled in another Montana school and you are unable to find a match in the Student Locator contact the student's previous school or the OPI AIM Help Desk for assistance locating the student's state id number.

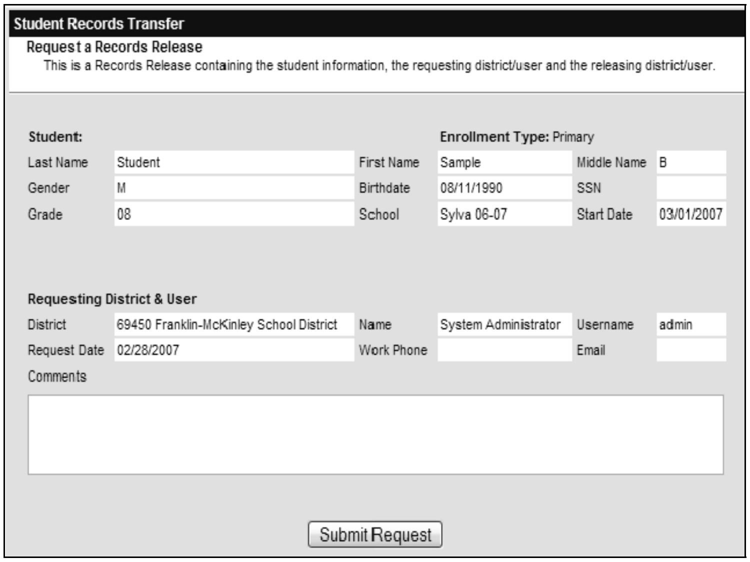
Instructions for Adding a New Student (First Enrollment in the state of Montana)



1. Create a local **Student Number** by either entering the number manually or selecting **Generate Number**. Generate Number is only available if a student number format has been set in System Administration.
2. A State ID for the student is created automatically when the district system syncs with the AIM State Edition. Leave this field blank.
3. Enter the student's Identity Information. All fields red with an asterisk are required fields and must be completed to save the record.
4. Enroll the student by selecting the student's current Grade, a Start Date and a Start Status that accurately records when and why this student is being enrolled.
5. Click **Save**. This will take you to the Summary tab.
6. Click on the Enrollment tab and open the enrollment record.
7. Enter all applicable state reporting data for this student.
8. Proceed to the *Adding People* section in this chapter.

Instructions for Transferring a Student from another District in Montana (District – to – District Transfer)

If the student has previously been enrolled in another school within the state of Montana, the user may transfer their current records into the new district once the previous district has released that student's records.



Student Records Transfer

Request a Records Release

This is a Records Release containing the student information, the requesting district/user and the releasing district/user.

Student: **Enrollment Type:** Primary

Last Name	Student	First Name	Sample	Middle Name	B
Gender	M	Birthdate	08/11/1990	SSN	
Grade	08	School	Sylva 06-07	Start Date	03/01/2007

Requesting District & User

District	69450 Franklin-McKinley School District	Name	System Administrator	Username	admin
Request Date	02/28/2007	Work Phone		Email	

Comments

Submit Request

What do the different Service Type selections mean?

When enrolling a student, there are three options available for selection under the Service Type dropdown list in the Enrollment Detail editor.

P: Primary *represents the main enrollment record for a student. Most students will have a primary enrollment record.*

S: Partial *represents a concurrent enrollment record where a student is taking a few courses at another school (e.g,. 10th grade student is taking one course in the vocational school).*

N: Special Education Services *represents a student who is enrolled in a public school solely to receive special education services (e.g. a home-schooled student who is receiving speech therapy services at a public school within the state of Montana.*

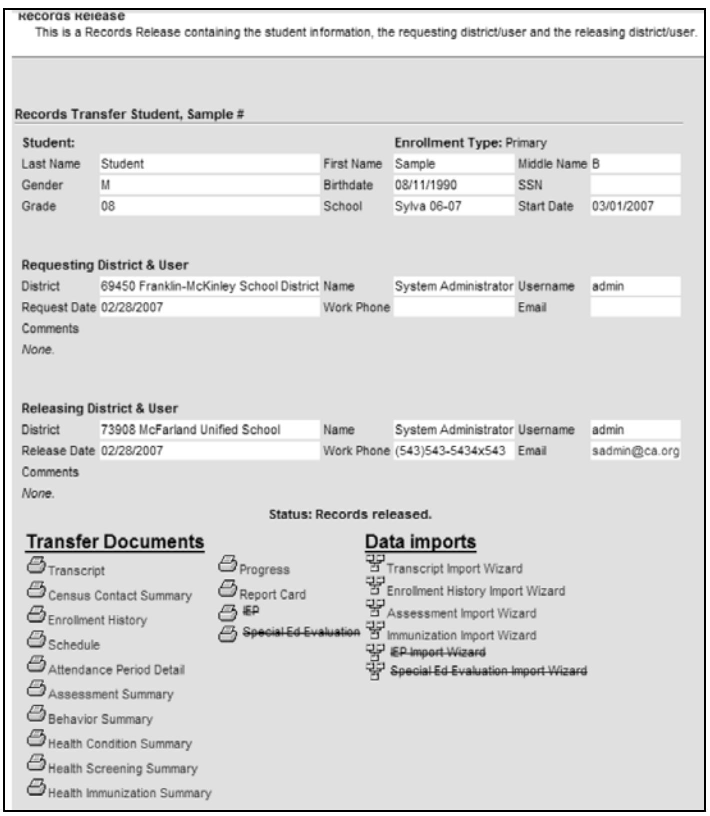
1. If the student is found in the Student Locator search results, click on his or her link.
2. OPTIONAL: Create a local **Student Number** by either entering the number manually or selecting **Generate Number**.
3. Verify student demographic information.
4. Enroll the student by selecting the appropriate school **Calendar** and **Schedule**. Enter the student's current **Grade**, a **Start Date** and a **Start Status** that accurately records when and why this student is being enrolled.
5. Click **Save**.
6. The **Records Transfer Request** form will display.
7. Enter any comments and click **Submit Request**. A message will be sent to the student's former district requesting the student's records to be released. A notice will appear in the user's Process Inbox.

Instructions for Importing Records Transferred

After the former district releases the student's records, selected records may be imported into the receiving district's database using data import wizards**. Other records for this student will be available in read-only PDF documents.**

NOTE: Only those records entered or maintained in the AIM Montana Edition will be available for transfer.

1. Navigate to the Process Inbox on the home page by selecting the user's name from the Index in the Outline.
2. Select the Transfer Released link, located in the Process Inbox.
3. To print a transfer document, select the link for that document. A PDF with the student's information will open in a new window and can be opened or printed, as needed. The document saves under the records transfer until the user deletes the record.
4. To use the data import wizards, select the wizard that contains the data to be imported. Follow the directions on the screen to complete the import.



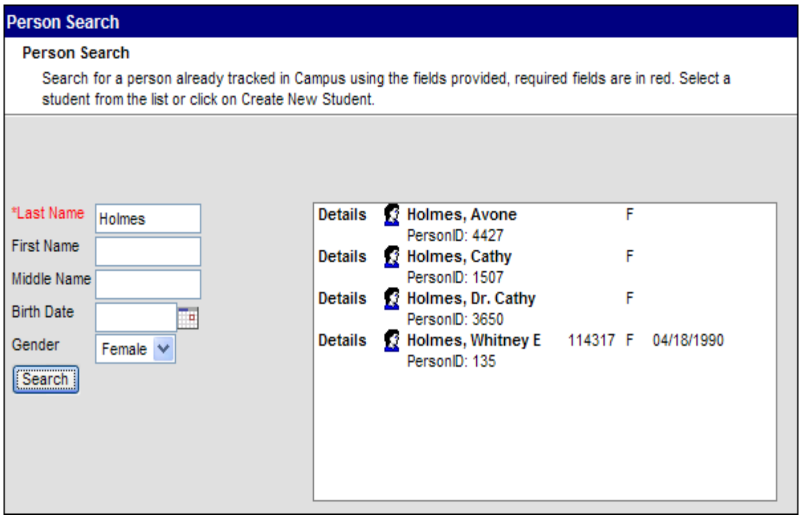
***Each data import wizard is** a one-time process. When importing student records, records from the former district will need to be mapped (matched) to data elements and categories in your district. Importing data from each wizard must be completed in full. Some of the import wizards will allow the user to edit values based on local requirements.*

***Transfer documents,** available in PDF format, may be opened or printed locally. The data on these records will need to be manually entered in to the district's database or made available for users with appropriate tool rights as read-only documents on the Records Transfer tab in Student Information.*

Adding People

Other people associated with a new student will need to be added to your district's Montana Edition database. This includes parents, siblings, service providers and/or emergency contacts.

Path: Index > Census > Add Person



Enter enough criteria to limit your results to a usable number; however, do not enter so much information that no results are found. For example, if the father's name is James Smith, searching for "James Smith" would exclude any record that may have been created as "Jim Smith". Searching by Last Name and First Initial may yield better results.

***In Montana,** it is only required to enter special education students and parent contacts in Census. It is highly recommended that special education, general education, counselors, principals, psychologists, service providers, and all other people who serve on student IEP teams be entered in Census. This process will reduce the number of times data will need to be entered for these individuals.*

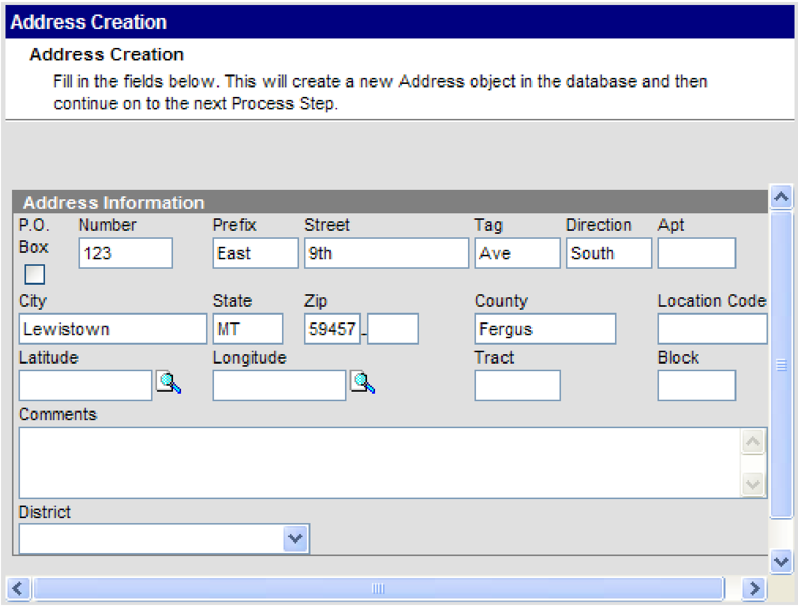
Instructions for Adding People

1. Expand the Census module and select the **Add Person** link.
2. Enter the search criteria to determine if this person already exists in the database.
3. Click **Search**.
4. All people who match your search results will display in the search results workspace. Use the information provided on this screen or click **Details** to find more demographic information to determine if you have found an exact match.
5. If no results are found, click **Create New Person**.
6. Enter the information to complete the person's demographic data as required. Only Last Name, First Name, and Gender are required. Do not check **Generate Number** on people who are not students. **Students must be entered through the Student Locator.**
7. Click **Save**.

Adding Addresses

Addressess may consist of a P.O. Box for mailing purposes, a primary physical address and/or a secondary address associated with the student. Addresses are linked to the Household of a student through the Census Wizard.

Path: Index > Census > Add Address



Prefix *– A directional indication before the street name (e.g. 2000* ***East*** *Maple Street).*

Tag *– The abbreviation or name type given for the street (e.g. St., Blvd., P., Dr.) Consult your local post office for preferred abbreviations or names.*

Direction *– a directional indication listed after the street name and tag (e.g. East 6th Street* ***NE****).*

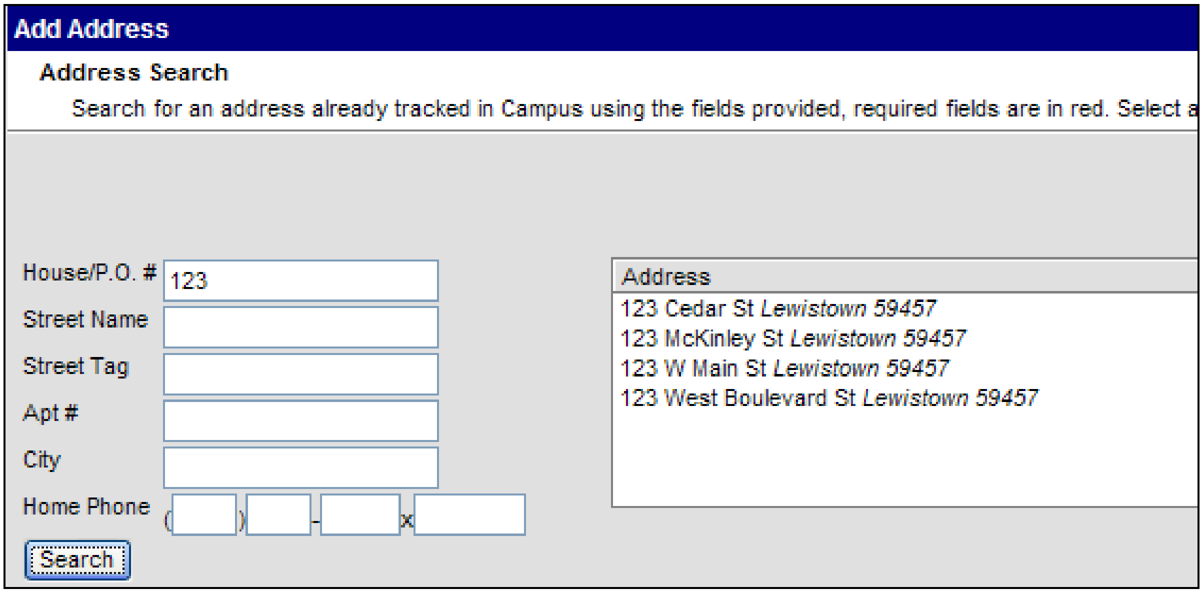
In Montana, *it is important to enter the mailing addresses for students as this information is needed for Special Education forms. If the mailing address is a P.O. Box, make sure to mark the P.O. Box check box, enter a Number, City, State and Zip Code. Do NOT mark the P.O. Box check box if the mailing address is associated with a street name.*

Instructions for Adding an Address

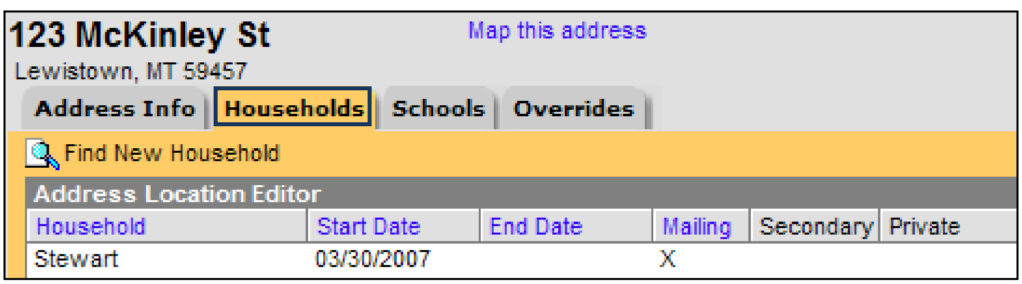
1. Expand the Census module and select the **Add Address** link.
2. Enter the search criteria to search for the family's address.
3. Click **Search**.
4. If an address is found and shows in the search results workspace, click on the address and proceed with the section that follows, "Checking an Existing Address."
5. If no results are found, click **Create New Address.**
6. Enter the elements for the address in the fields provided.
7. Click **Save**.
8. Proceed to the *Census Wizard* section of this chapter.

Checking an Existing Address

If the address is found when searching, perform the following steps.



1. Select the Address that appears to match from the search results workspace. This action will navigate the user to the Address tab set for the selected address.
2. Check to be sure that all data elements match the address. DO NOT CHANGE the address data at this point as you may be changing the address of another family.
3. Click the **Households** tab to determine if the household is currently at this address. If a household appears, verify if this address should be ended on the current household so the new family may have this address linked to their household.

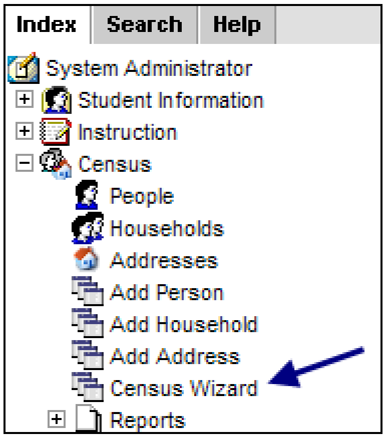


4. If the address is not currently being used by a household, proceed to the *Census Wizard* section of this chapter.

Census Wizard

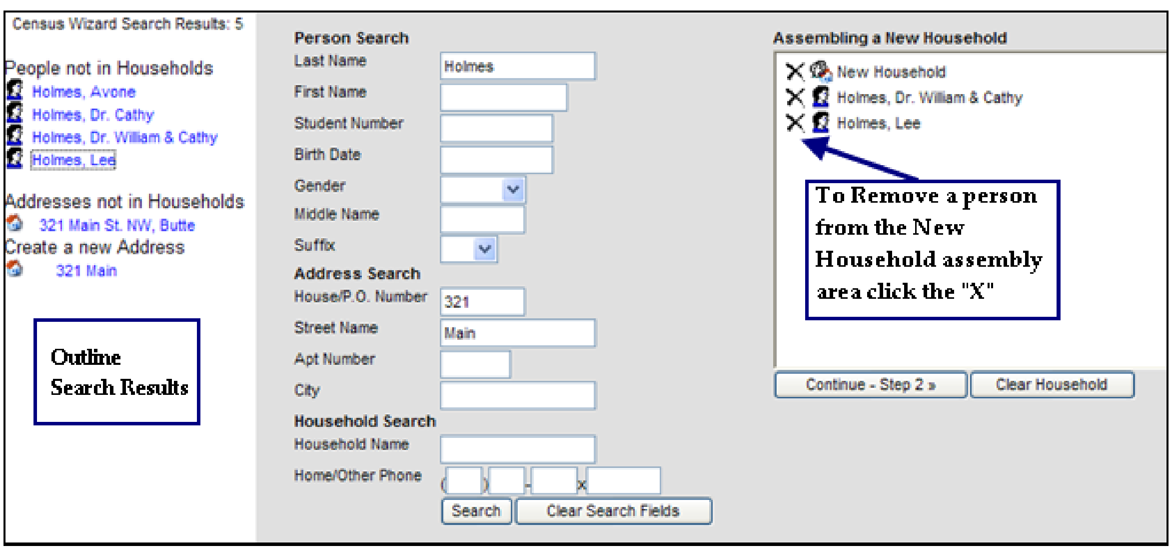
The Census Wizard tool allows a user to create a household (family unit) for a group of people, attach a mailing address and define relationships between people.

Path: Index > Census > Census Wizard



Step 1 - Instructions for Assembling Households and Addresses

1. Navigate to the **Census Wizard** from the Index tab in the outline.
2. Use the Person Search to search for household members.
3. Select a person from the outline to place them into the Assembling a New Household box.
4. If needed, people may be removed from the assembly area by clicking on the "X" next to their name.
5. Use the Address Search to search for the household's address by number and/or street name.
6. Click on the address in the outline to place it into the Assembling a New Household box.
7. Click **Continue – Step 2**.



Step 2 – Edit Membership and Mailing

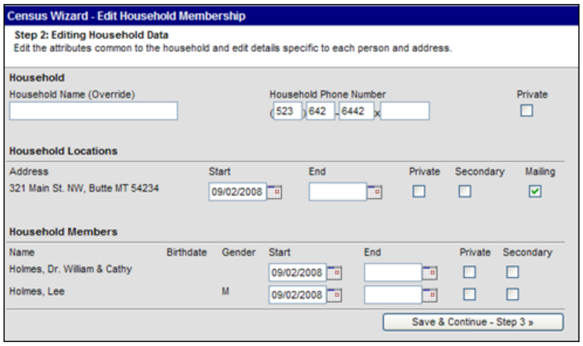
1. Name the household or leave the household name null. Leaving the household name null will result in the name of the household defaulting to the guardian(s) names.

2. Enter the **Household Phone Number**.
3. Mark the **Mailing** checkbox next to the address.
4. Enter the **Start Date**. This is usually either the date the information is provided or the first day of the current school year.
5. Select the Private and Secondary flags on address and membership, if applicable.
6. Click **Save & Continue – Step 3**.

Private *– This checkbox does not hide data from a user of Campus. The Private check box may be marked to be used as a filter when creating an Ad Hoc query. If marked this information may be excluded from a data export.*

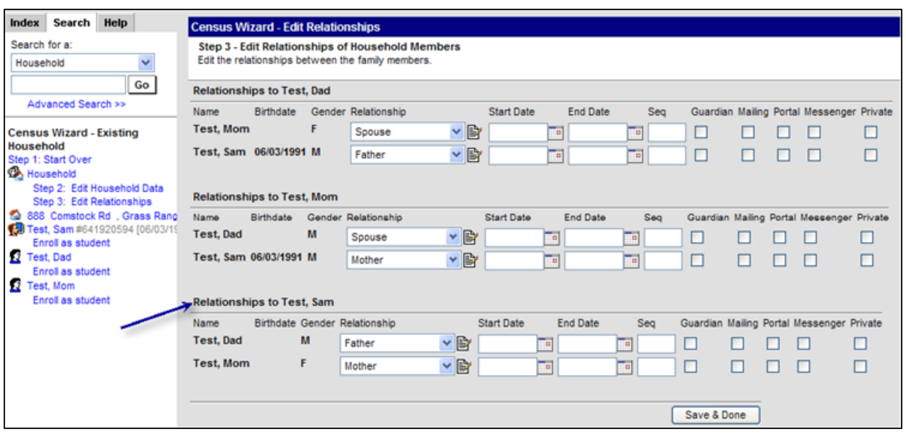
Secondary address *– If marked, this check box indicates when an address is secondary (e.g. a lake home, cabin in the mountains, or other second home).*

Secondary membership *– If marked, this check box indicates this member can be contacted through this household, but this is not his/her primary household (e.g. a student who lives with one parent for part of the time might be considered a secondary membership).*



Step 3 – Defining Relationships

1. Find the student.
2. Select the Relationship in relation to the student.
3. Set all other relationships in the household.



4. If needed, a comment may be entered on a relationship by clicking on the **Notepad icon**, which opens a Comments space.
5. Mark the applicable checkboxes next to each household member. Enter the **Start Date**. This is usually either the date the information is provided or the first day of the current school year.
6. Click **Save & Done** when finished.

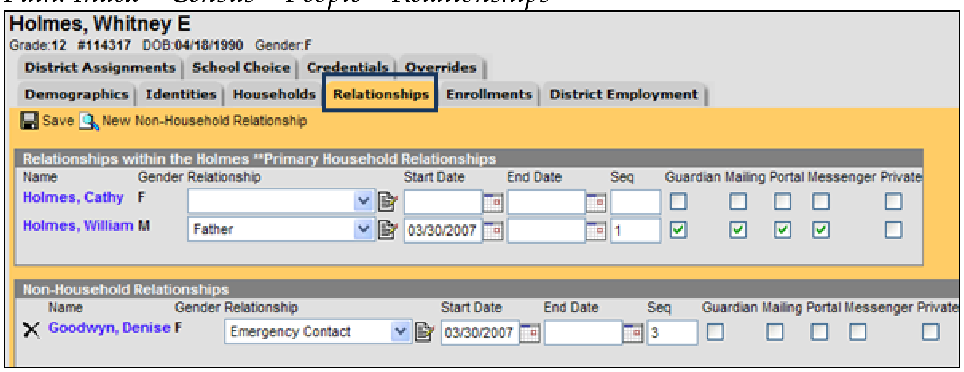
- **Guardian** – If marked, this checkbox indicates the person is the legal guardian of the child. This person will show on the student summary tab information and will pull into the Special Education documents.

- **Mailing** – If marked, this checkbox will indicate that the person will receive mailing for this student (e.g., report cards, behavior information).
- **Portal** – If marked, this checkbox gives this person access to the student's information in the Campus Portal.
- **Messenger** – If marked, this checkbox will indicate the person should receive messages from the Dialer and Email Messenger tools available in Campus.

Defining Non-Household Relationships

Non-household relationships (e.g. emergency contacts) with a student are defined in the **People** section of the **Index.**

Path: Index > Census > People > Relationships

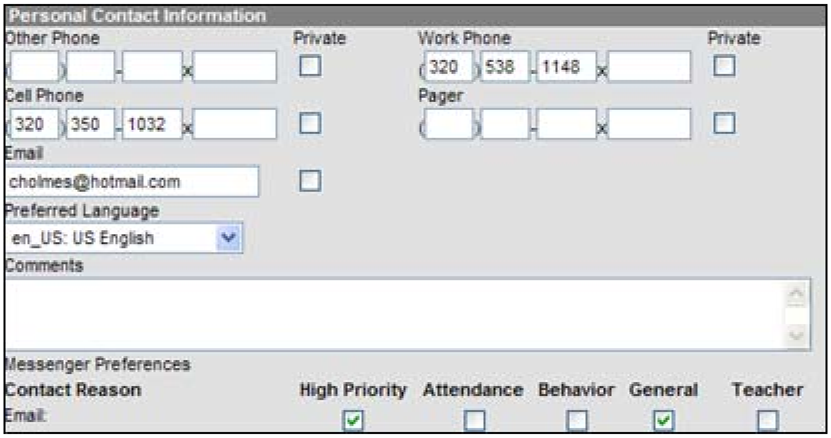


Instructions for Defining Non-Household Relationships

1. Expand the **Census** module from the Index in the outline.
2. Click on the **People** link.
3. Search for the student using *last name, first name* format.
4. Click on the student's name link in the search results.
5. Select the **Relationships** tab.
6. Click on the **New Non-Household Relationship** icon.
7. Search for the existing person that will be linked to this student as a non-household relationship.
8. Select that person from the search results.
9. Close the search box by clicking on the red x in the upper right hand corner.
10. Enter **Start Dates** and select the appropriate flags.
11. Click **Save**.

Adding Parent Contact Information

Path: Index > Census > People > Demographics > Personal Contact Information



Instructions for adding Person Contact Information

1. Expand the **Census** module from the Index in the outline.
2. Click on the **People** link from the Census module.
3. Search for the person using *last name, first name* format.
4. Click on the person's name link in the search results from the Outline.
5. Select the **Demographics** tab.
6. Enter the person's contact information. All phone numbers and the email address listed here pertain to the selected person, NOT the student or his/her household.
   NOTE: The private check box will not hide information from Campus users; however it can be used to restrict results of a data export in the Ad Hoc Reporting module.
7. If the person is a Messenger contact, select the type of email messages this person is authorized to receive. Make sure an email address for this person has been entered in the Personal Contact Information editor.
8. Click **Save**.

Email Messenger Preferences *– Each check box provided works with the Email Messenger built in to Campus. These settings work in conjunction with the Messenger check box set on the relationship between a person and a student. An email address must be entered in the Personal Contact Information editor for this person to receive messages.*

High Priority *– If marked, this checkbox indicates that this person will receive all important messages via email sent by the district.*

Attendance *– If marked, this checkbox indicates that this person will receive all messages related to this student's attendance via email sent by the district.*

Behavior *– If marked, this checkbox indicates that this person will receive all messages related to the student's behavior via email sent by the district.*

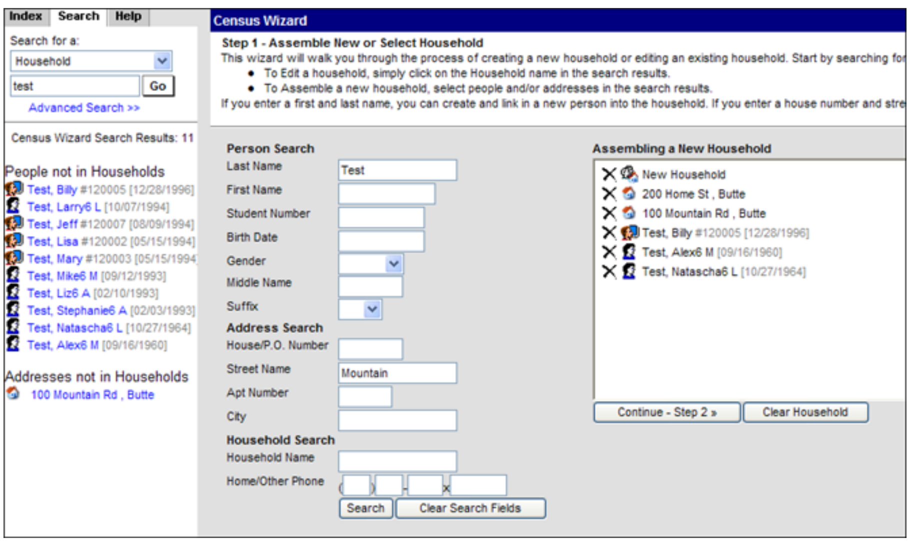
General *– If marked, this checkbox indicates that this person will receive all general information email messages sent by the district.*

Teacher *– If marked, this check box is to indicate that this person will receive all messages related to this student's class information via email as sent by the student's teachers.*

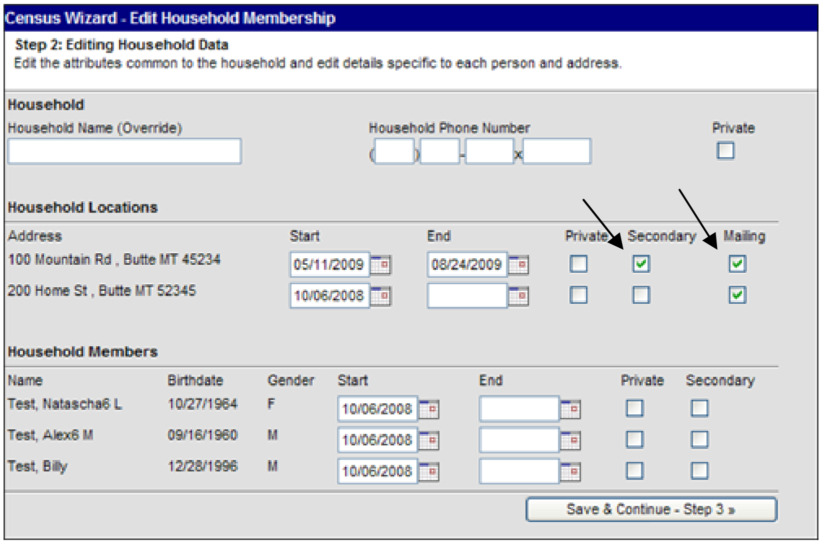
Instructions for setting up a Single Household

This set of instructions assumes one student and two parents are living in one primary household. The parents have a second home in the mountains where they reside in the summer months. Detailed instructions for each step are provided in the previous sections.

1. Add the student with the **Student Locator.**
2. Add the two parents with the **Add People** tool.
3. Add the Address for the primary home with the **Add Address** tool.
4. Add the Address for the second home with the **Add Address** tool.
5. Navigate to and select the **Census Wizard** tool.
6. Search for people by last name to be added to this household. Repeat this search if people at this household have different last names.
7. Select the people to add to the household from the search results in the **Outline**.
8. Search for the household address. Repeat this search for any additional addresses connected to the people living in this household (i.e. P.O. Box or Second Home).



9. Select the **Continue-Step 2 button**.
10. On the next screen, select Secondary on the address that represents the second home. If the family would like to receive mailing at this address, mark the mailing check box (you may enter a start and end date to reflect the timeframe the second home should receive mailings). **Note: Household Members are not marked as Secondary in this situation.**



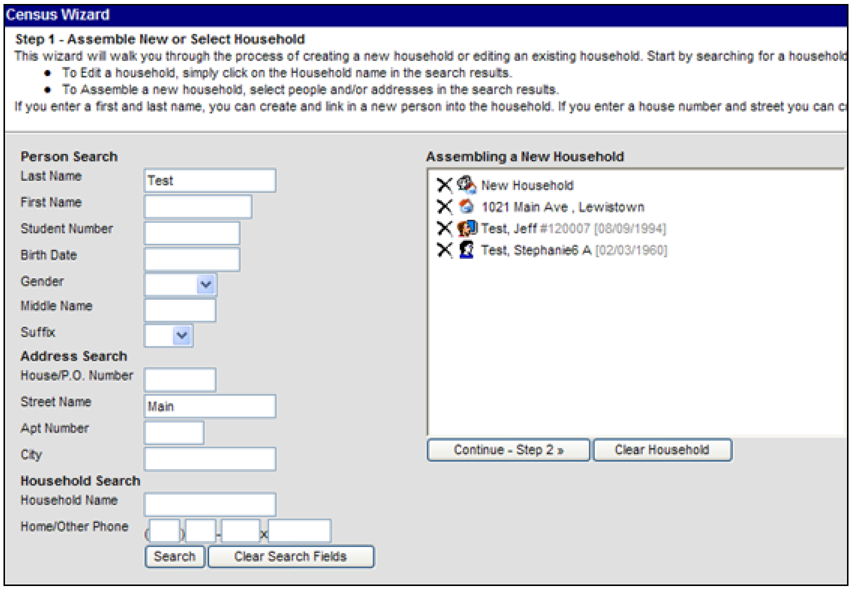
11. Select the **Save & Continue – Step 3** button.
12. Establish appropriate relationships and mark the relevant check boxes.
13. Select the Save & Done button.

Instructions for setting up a Split Household

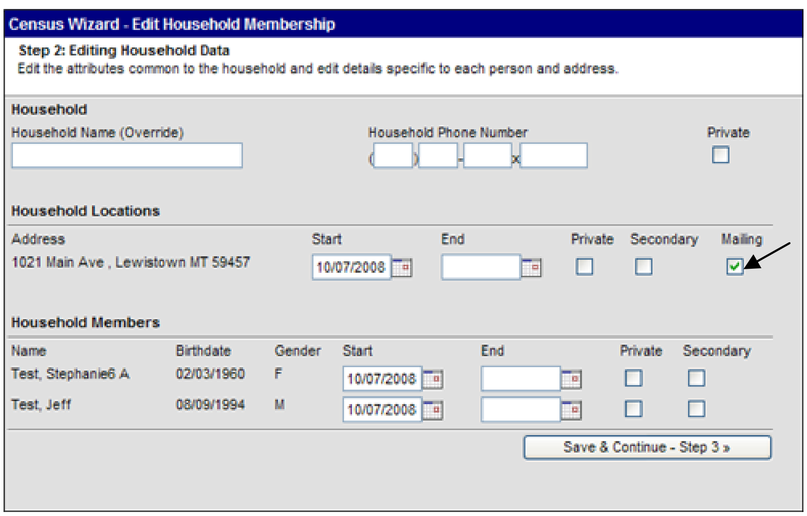
This set of instructions assumes one student who is living with one of his/her parents as their primary household and is a secondary member in the household of the other parent. Detailed instructions for each step are provided in the previous sections.

Primary Household Instructions

1. Add the student with the **Student Locator**.
2. Add the parent of the primary household with the **Add People** tool.
3. Add the Address for the student's primary home.
4. Navigate to and select the **Census Wizard** tool.
5. Search for the student and parent who live in the primary home.
6. Select the people to add to the household from the search results in the **Outline**.
7. Search for the primary address.
8. Select the primary address from the search results in the **Outline**.



9. Select the **Continue-Step 2** button.
10. On the next screen, select mailing on the address and enter appropriate start dates.

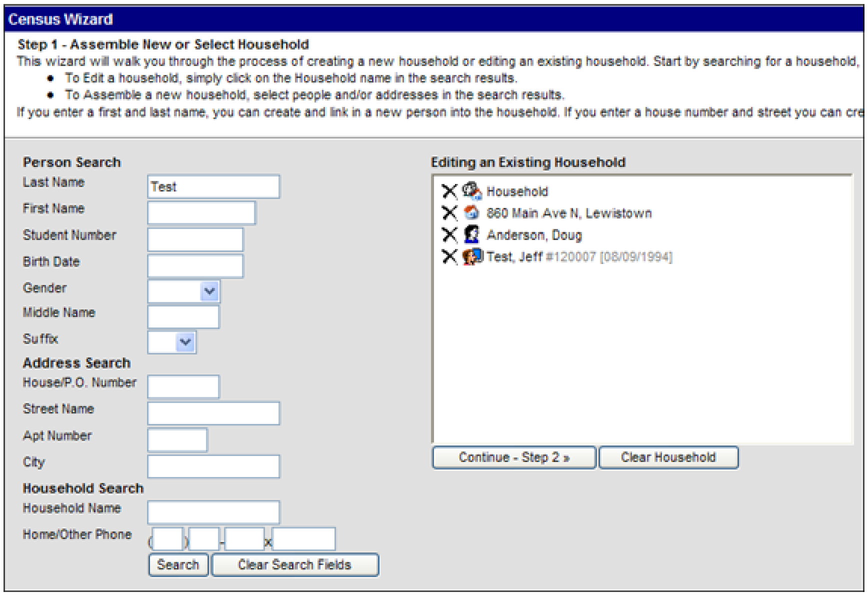


11. Select the **Save & Continue – Step 3** button.
12. Establish appropriate relationships and mark the relevant check boxes.
13. Select the **Save & Done** button.

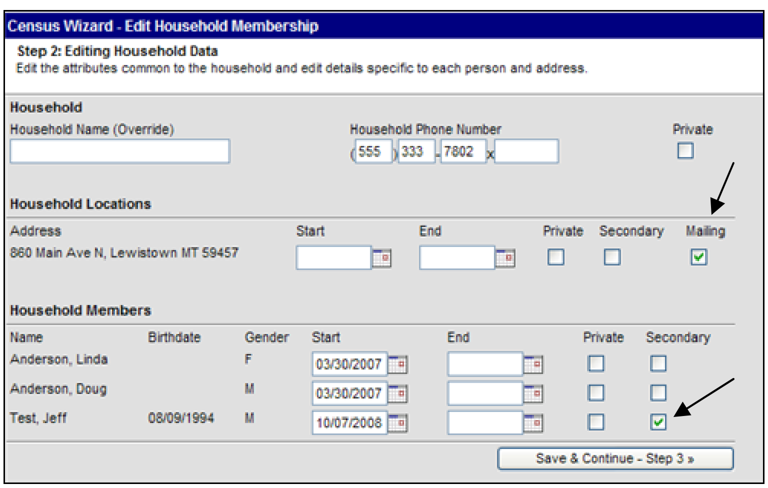
Secondary Household Instructions

1. Add the second parent with the **Add Person** tool.
2. Add the address of the second parent’s house with the **Add Address** Tool.
3. Navigate to and select the **Census Wizard** tool to create the household for the student’s other parent.
4. Search for the student and the parent that the student lives with on a part-time basis.

5. Select the people to add to the household from the search results in the **Outline**.
6. Search for the address of the house the student lives in on a part time basis.
7. Select this address from the search results in the **Outline**.



8. Select the **Continue – Step 2** button.
9. Select Mailing on the Address and the Secondary check box next to the **student** under Household Members.

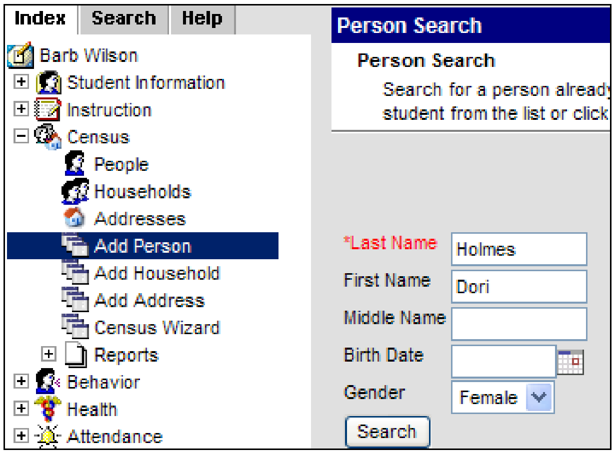


10. Select the **Save & Continue – Step 3** button.
11. Establish appropriate relationships and mark the relevant check boxes between the student and the parent.
12. Select the **Save & Done** button.

Adding Staff

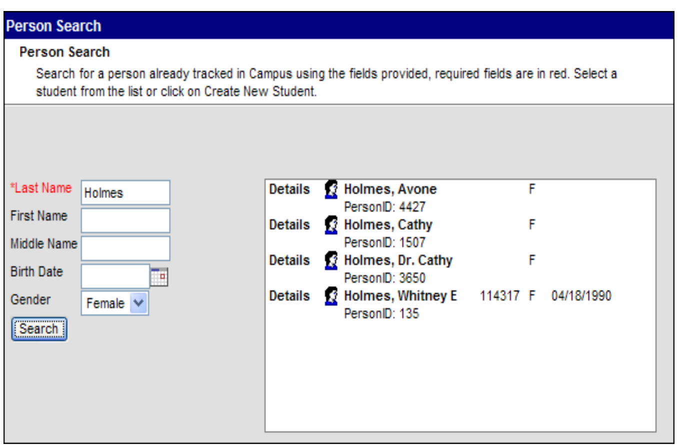
Staff entry requires each staff member to be entered as a person first; additional data elements and records are completed to indicate their school assignment and role in the district.

Path: Index > Census > Add Person



Step 1 - Instructions for Adding People as Staff

1. Expand the Census module and select the **Add Person** link.
2. Enter the search criteria to determine if this person already exists in the database.
3. Click **Search**.
4. All people who match your search results will display in the search results Workspace. To determine if a result is an exact match, use the information provided on this screen or click **Details** to find more demographic information.



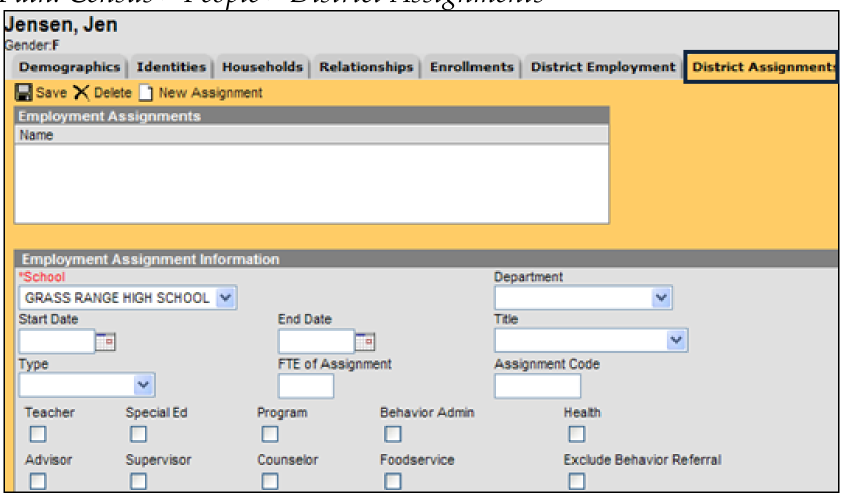
The Person search only searches the district's own database. Persons entered in other databases are not accessible under the Person Search (e.g., an itinerant Speech Pathologist will need to be entered in each district they serve.

5. If no results are found, click **Create New Person**.
6. Enter the information to complete the person's demographic data. Only Last Name, First Name, and Gender are required.
7. Click **Save**.

Step 2 - Instructions for Creating a District Assignment

1. Select the **District Assignment** tab, located in the People section.
2. Click on the **New Assignment** icon.
3. Select the **School** this staff person is assigned to work at during the current school year. **NOTE: A staff person may have multiple district assignments if they travel between schools. Repeat steps 3 – 7 of these instructions for each school this staff person is assigned to.**
4. Enter a **Start Date** that reflects the first day of work at this school.
5. Choose additional information from the dropdown lists, as needed.
6. Select one or more District Assignment roles, depending on the duties of this staff person.
7. Click **Save**.

Path: Census > People > District Assignments



District Assignment Roles

Each checkbox on the District Assignment tab will allow the selected staff person to be available in specific dropdown lists for selection throughout the Campus product. The ***Program***, ***Health***, ***Counselor***, ***Food Service***, and ***Exclude Behavior Referral*** are not applicable to the use of the Infinite Campus Montana Edition.

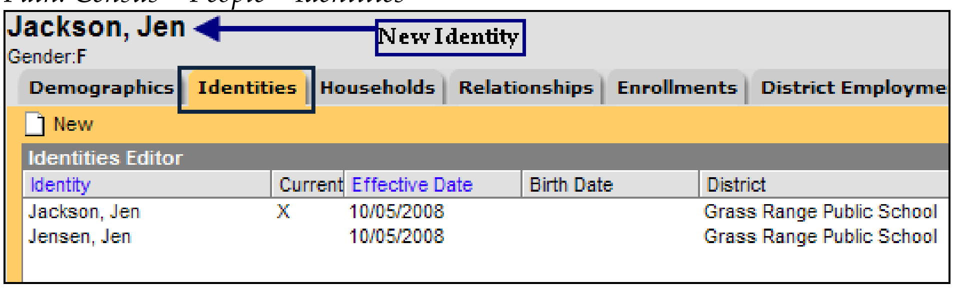
- **Teacher** – If marked, this checkbox allows the staff person to be assigned to a course section and provides the person with access to that section's roster and grade information.
- **Special Ed** – If marked, this checkbox allows the staff person to be selected in the Special Ed dropdown list when creating an IEP team for a student. This checkbox should be marked for all special education teachers, related service providers and special education administrators.
- **Behavior Admin** – If marked, this checkbox allows this person to be selected as the behavior administrator, who resolves student behavior issues.

- **Advisor –** If marked, this checkbox allows the staff person to be selected in the Advisor dropdown list when creating an IEP team for a student. This will be used for all other team members, excluding guardians, general education teachers, related service providers and or special education staff.
- **Supervisor** – If checked, this checkbox allows this staff person to be selected as the supervisor of other school staff from the dropdown list on a person's district assignment.

Census Maintenance

Modifying Census data is an important aspect of maintaining data integrity within your Campus database. This section provides instructions on best practices with maintaining Census data for all people in your district's database.

Path: Census > People > Identities



Instructions for Changing a Person's Identity

A person has submitted a request for a legal name change. The steps that follow are necessary to complete for any person that has a change in their legal name.

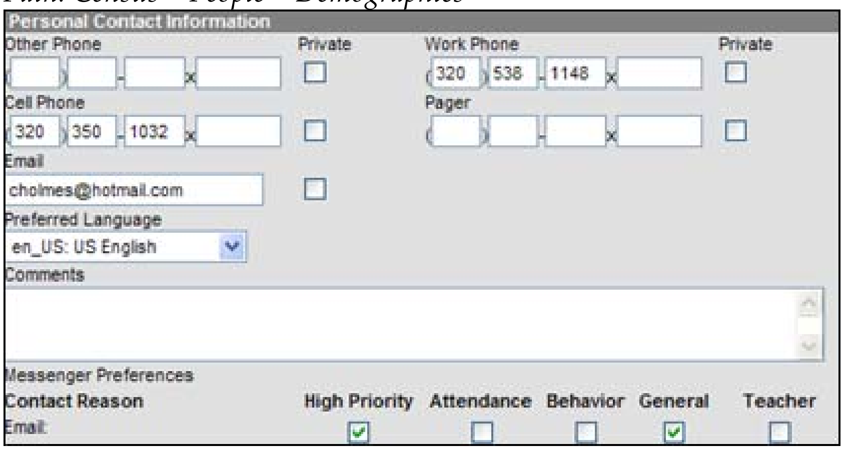
1. From the Search tab in the outline, select **All People**.
2. Search for the person using last name, first name format.
3. Select the person link in the search results of the Outline.
4. Click the **Identities** tab.
5. Click **New**.
6. Enter the person's new name and/or other information.
7. Select the effective date for when the identity change will start.
8. Click **Save**.
9. Verify that the new identity is marked in the list as the current identity on the identities editor.
10. Click on the person's previous name in the search results to verify that the new name appears as the header for this person.

Instructions for Changing a Person's Contact Information

A person has submitted a request to change their personal contact information, which includes phone numbers, email address and messenger preferences.

1. From the Search tab in the outline, select **All People**.
2. Search for the person using last name, first name.
3. Select the person link in the search results of the outline.
4. Click the **Demographics** tab.
5. Scroll to the Personal Contact Information editor.
6. Overwrite the current information with the new information (e.g. new cell phone number, email address and/or email contact reason).
7. Click **Save**.

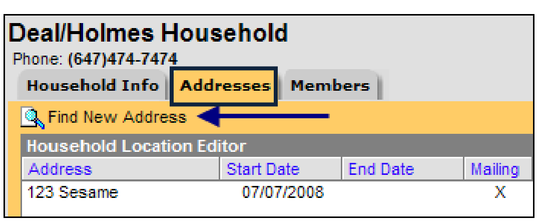
Path: Census > People > Demographics



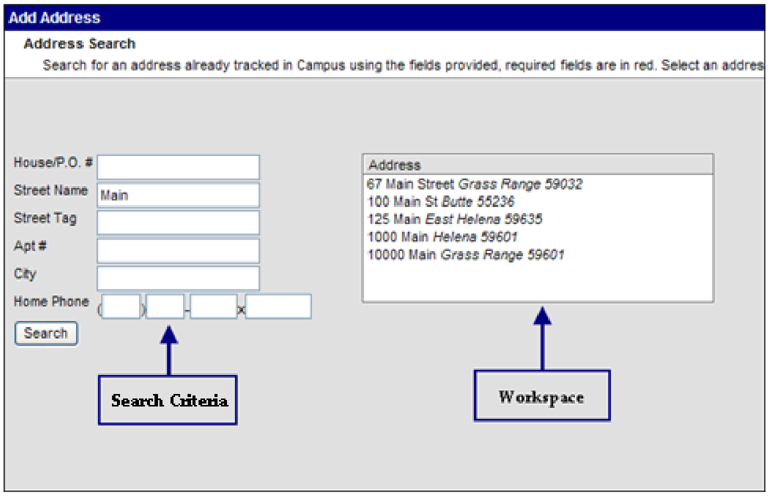
Instructions for Changing a Household Address

A family unit (household) is moving to a new address.

1. From the Search tab in the outline, select **Household**.
2. Search for the household by entering the last name of a person that is a member of this household.
3. Select the household name link in the search results of the outline.
4. Click the **Addresses** tab.
5. Click **Find New Address**.



6. Search for the new address.



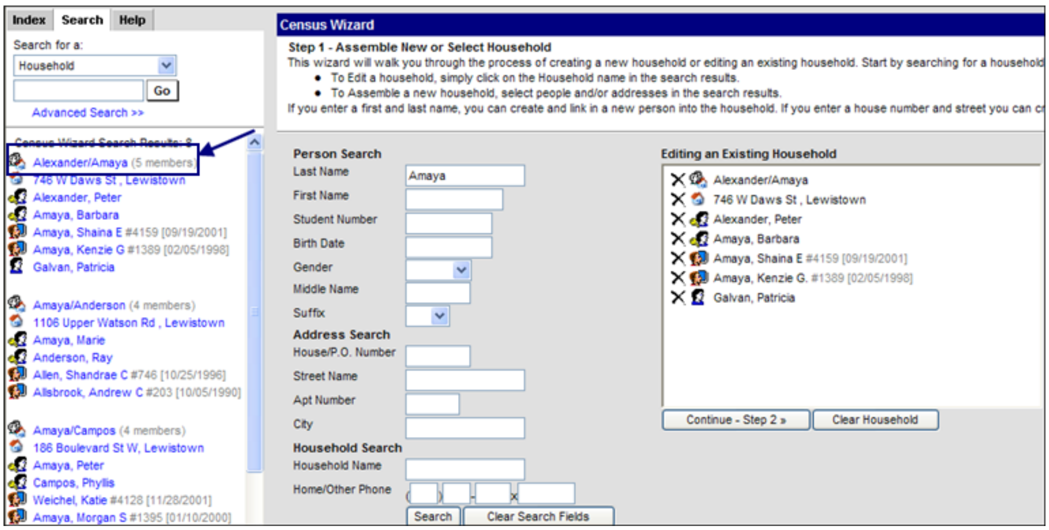
7. If the address does not exist in Campus, click **New Address**; otherwise, select the address in the search results Workspace and move to step 10.
8. Enter the information for the new address.
9. Click **Save**.
10. Select the address from the search results workspace.
11. Verify that no household is linked to this address by selecting the **Household Info** tab. If there is a household linked, end date the address on the previous household or determine if this address should be linked to more than one family.
12. Select the **Address tab**.
13. Enter the **Start Date** for the new address.
14. Mark the **Mailing** checkbox if this address will receive mail.
15. Click **Save**.

Splitting a Household into Two New Households

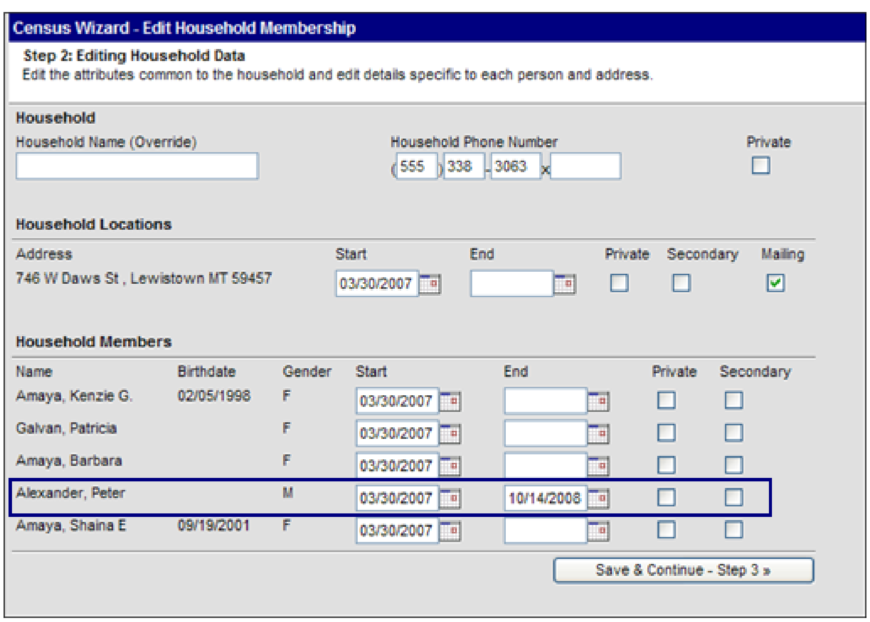
This set of instructions is needed if a current household is split by divorce or separation.

Instructions for Moving a Parent out of the Current Household

1. Expand the Census module from the **Index** in the **Outline**.
2. Search for the **Household** that needs to be split, by entering a last name of one of the parents in the household.
3. Select the **Household** name link from the **Outline**.



4. Select the **Continue –Step 2** button.
5. Enter an end date on the Household Member (i.e. Parent) that is moving out of this Household.



6. Select the **Save & Continue – Step 3** button.
7. Select the **Save & Done** button.

Instructions for Creating a New Household for an Exiting Member

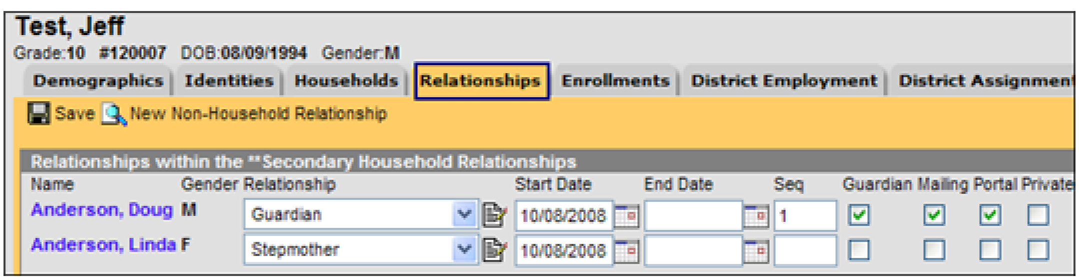
1. Add the Address the exiting member will be moving to using the **Add Address** tool.
2. Expand the **Census** module from the **Index** in the **Outline**.
3. Navigate to and select the **Census Wizard** tool.
4. Search for and select the exiting household members, the student, and the new address.
5. Select the **Continue – Step 3** button.
6. Enter a start date on the address and mark Mailing.
7. Enter start dates on each **Household Member**.
8. Select Secondary on the student in the **Household Members** section if this student will only live with this member part-time.
9. Select **Save & Continue – Step 3**.
10. Modify relationships if needed.
11. Select **Save & Done**.

Maintaining Relationships

This set of instructions is needed for maintaining established relationships between two persons in Campus.

Instructions for Maintaining Relationships

1. From the Search tab in the outline, select **All People**.
2. Search for the student using *last name, first name* format.
3. Select the student name link in the search results of the outline.
4. Select the **Relationships** tab.



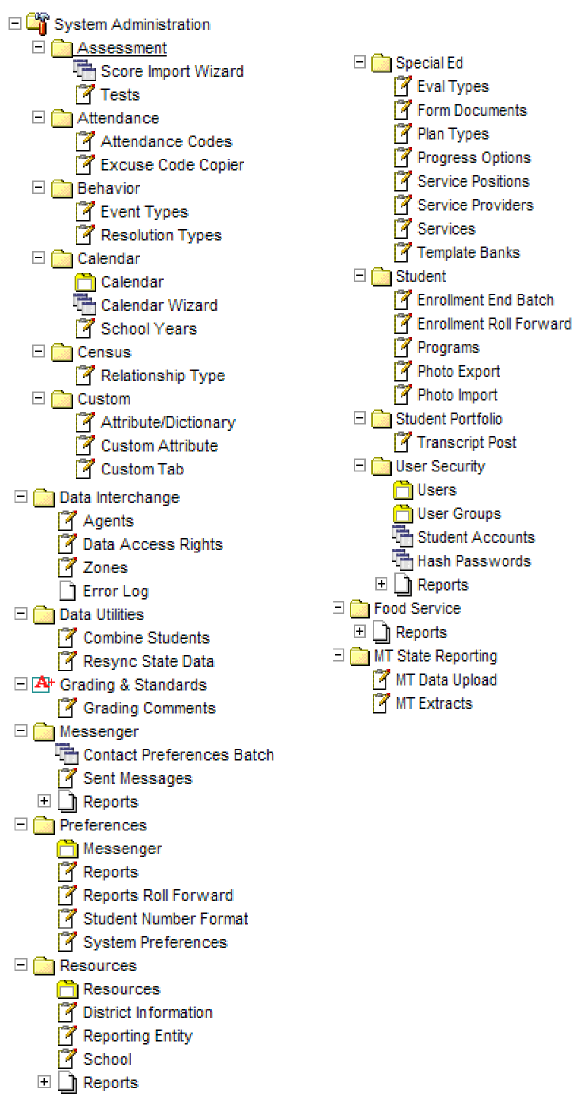
5. Edit the checkboxes to reflect changes with respect to the selected student.
6. Click **Save**.

Chapter 4 – System Administration

This chapter provides information on how to verify established calendar information, setup specific district-wide tools and preferences in the Montana Edition. Modules available in the System Administration folder represent the tools required for basic set up of the Montana Edition and value-added optional tools.

System Administration Tools

Basic and optional Value Added tools are located in the System Administration folder. Each module, a short description, and if the module includes Basic or Value Added tools is provided in the table. **NOTE: Not every tool within a Basic module will be needed to complete the necessary set up of the Montana Edition for state reporting.**



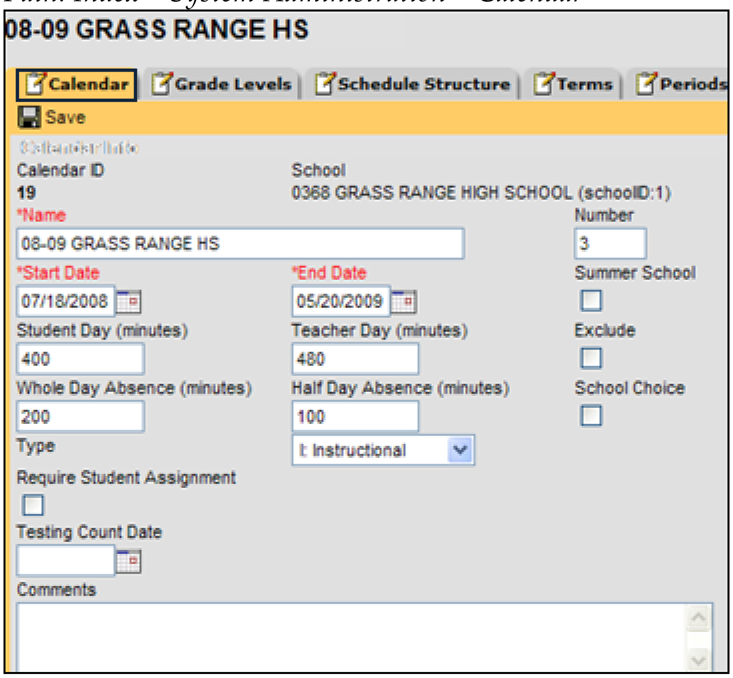
Module	Description	Basic	Value Added
Assessment	Set up area for test data		X
Attendance	Set up for Attendance Codes		X
Behavior	Set up for Behavior Codes		X
Calendar	Set up for School Calendar	X	
Census	Set up for Relationship Codes	X	
Custom	Add custom attributes and tabs		X
Data Interchange	Campus Technical Support tools		
Data Utilities	Student related sync tools	X	
Grading & Standards	Canned comments for report cards		X
Messenger	Tools for sending email messages		X
Preferences	System Set up	X	
Resources	District and School Editors	X	
Special Ed	Admin tools for Special Education		X
Student	Student set up tool	X	
Student Portfolio	Transcript grades tool		X
User Security	User access	X	
Food Service	Milk and Lunch Count		X
MT State Reporting	Uploads and Extracts	X	

Calendar Information

The Calendar folder in System Administration includes the calendar information that will be created for a future year or modified for the current school year. The timeline for this process is a district preference dependent on the tools that will be used in Montana Edition.

Note: Access to create new or modify Calendar information should be restricted to the System Administrator.
Current Calendar information will need to be verified and modified as necessary. This process will include reviewing calendar dates, grade levels, schedule structure, term dates, periods, and day information.

Path: Index > System Administration > Calendar



For more detailed information on maintaining calendar information, creating new calendars, and modifying calendar data refer to the Calendar Administration User Guide available on the Customer Support Portal.

Calendar Dates

Current Calendar information displays on the Calendar tab. To verify and modify (if necessary) Calendar information complete the steps that follow.

Instructions for Modifying Calendar Information

1. On the **Calendar** tab, verify the Name of the calendar (High School, Middle School, etc). This information will match the calendar that is selected in the toolbar.
2. Enter a unique **Number** for each calendar. This field is used as a tracking number in several Montana state reporting extracts to identify a specific calendar within a district.
3. Verify the **Start** and **End** dates of the calendar. In Montana, the start and end dates represent the book ends of the activities occurring in the school.
4. Click the **Save** icon when finished.

The additional fields available on this tab are optional based on district preference related to the use of the Montana Edition. For more information refer to the Calendar Administration User Guide available on the Customer Support Portal.

Grade Levels

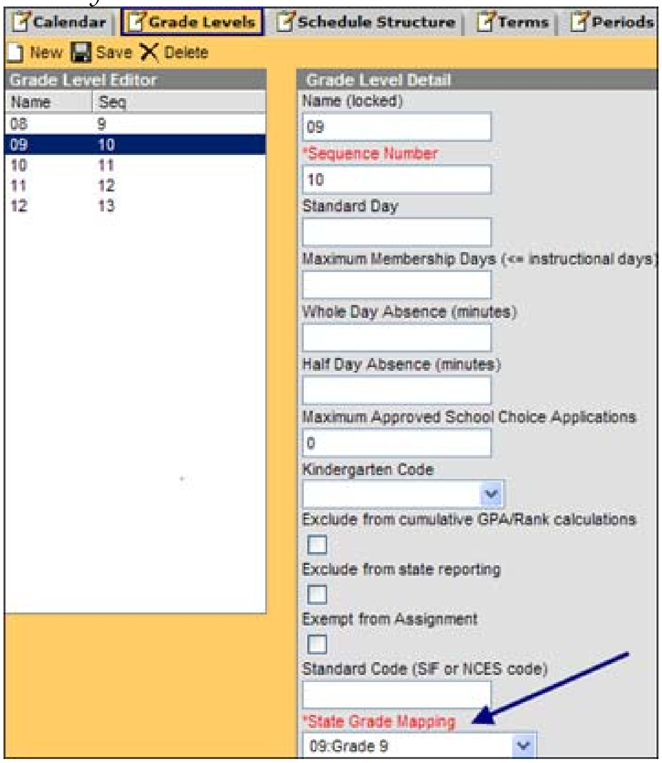
The **Grade Levels** listed in this editor reflect students who attend the selected **School**, **Calendar**, and/or **Schedule** from the toolbar. If only a single calendar is set up for a particular school, it will not be necessary to select a **Calendar** or **Schedule** from the dropdown list in the toolbar.

Instructions for Modifying Grade Level Information

1. On the **Grade Levels** tab, select a grade level to display the **Grade Level Detail** editor.
2. Verify each grade level has a unique **Name** and is locked. Locked means that this grade level has been mapped to a **State Grade Level**.
3. Verify each grade level has a **Sequence Number**. This number is used as a determinant in the enrollment roll forward process and should be consecutive throughout the district.
4. Select the appropriate code from the **State Grade Mapping** for each grade level.
5. Click the **Save** icon when finished.

The additional fields available on this tab are optional based on district preference related to the use of the AIM Montana Edition.

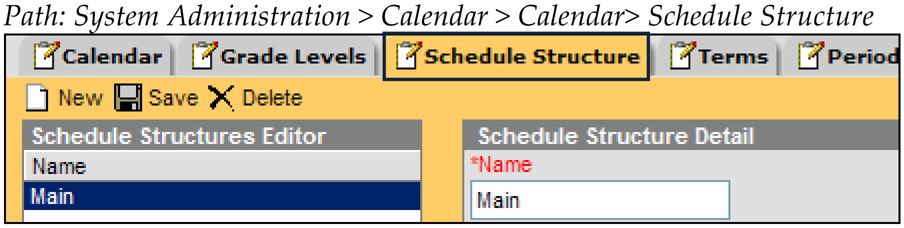
Path: System Administration > Calendar > Calendar > Grade Levels



Schedule Structure

Schedule Structures allow for different types of schedules to occur within one calendar. Multiple schedule structures are set up when different groups of students follow a different meeting pattern during the school year. For example, first through fifth grade students may meet in the same classes every day; whereas sixth through eighth grade students may meet in different classes every other day. Each **Schedule Structure** is tied to a unique term and period schedule. The majority of calendars will be set up with a single **Main** schedule structure.

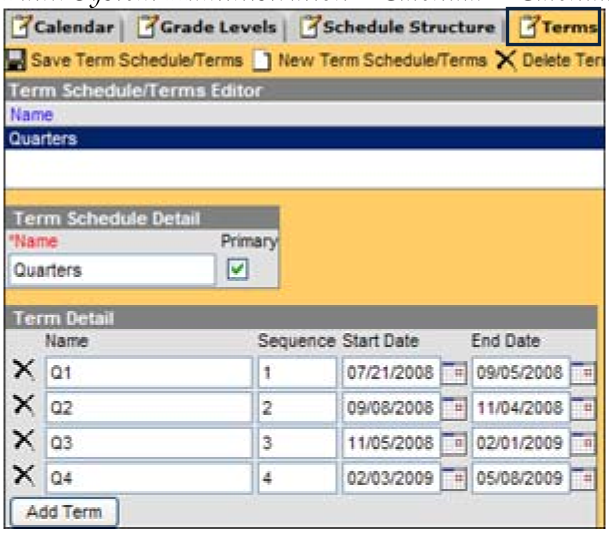
Path: System Administration > Calendar > Calendar> Schedule Structure



Terms

Calendar Terms list the type of calendar structure a group of students follows (e.g., trimesters, quarters, semesters, etc.). Start and End dates entered on this tab represent the beginning and end of a term.

Path: System Administration > Calendar > Calendar > Terms



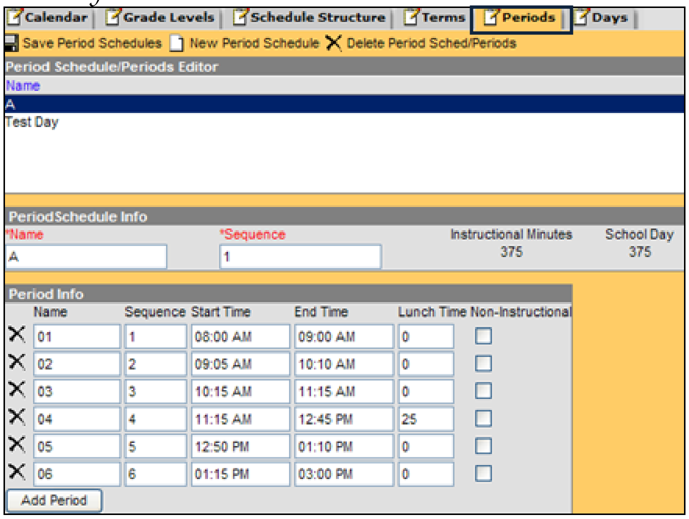
Instructions for Modifying Term Schedule Information

1. On the **Terms** tab, select the term schedule to display the **Term Schedule Detail** editor.
2. Verify that there is ONLY one **Term Schedule**. **Note: There should only be one Term Schedule added for each Schedule Structure.**
3. Verify the **Primary** term schedule checkbox is marked.
4. In the **Term Detail** editor, verify that the **Name** and **Sequence** are correct. If not, make the appropriate changes.
5. Enter the **Start** and **End** dates for each term in *mmddyy* format or by clicking the calendar icon to select a date. These dates reflect when the majority of students will begin and stop attending classes for each term.
6. Click the **Save** icon when finished.

Periods

OPTIONAL: The Periods tab lists the names and the times students are meeting throughout the school day. The Period Schedule will be assigned to school days to reflect the appropriate meeting pattern for each day. Multiple period schedules may be set up to accommodate for different meeting times to occur on different days (e.g., A/B Day rotation) or a different schedule is needed for a Test Day.

Path: System Administration > Calendar > Calendar > Periods



Instructions for Modifying Period Schedule Information

1. On the **Periods** tab, select the period schedule to display the **Period Schedule Info** editor.
2. In the **Period Schedule Info** editor, verify that the **Name** and **Sequence** are correct. If not, make the appropriate changes.
3. Enter the **Start** and **End** times for each period in standard format (e.g., 07:15 AM, 03:15 PM) or in military time (e.g., 0715, 1515).
4. Enter Lunch Time minutes that are included within a period. This number will be subtracted from the instructional minutes of this period.
5. Check the **Non-Instructional** check box for any period used as a place holder that is not to be calculated as a part of the instructional day (e.g., activity periods).
6. Click the **Save** icon when finished.

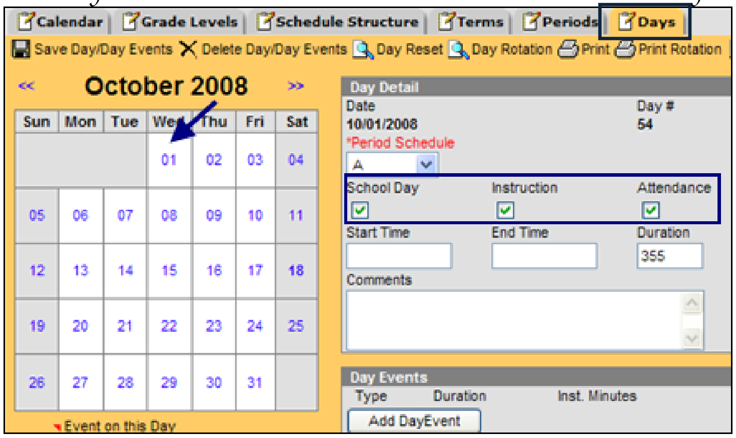
Days

OPTIONAL: The Days tab provides a summary of all days in the school calendar. Days can be marked as a school, instructional, and/or attendance day.

- **School Day** – this option is marked if staff or students are on the school grounds.
- **Instruction** – this option is marked if students are attending classes and receiving instruction on the selected day.
- **Attendance** – this option is marked if attendance is being recorded on the selected day.

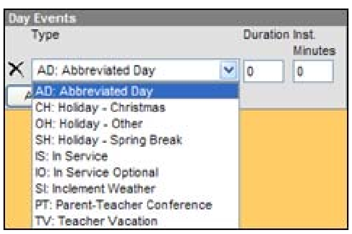
For example, on a staff in-service day, the school day option is selected; however the instruction and attendance options are not. On a holiday such as Thanksgiving, no options would be selected.

Path: System Administration > Calendar > Calendar > Days



Instructions for Modifying Day Information

1. On the **Days** tab, select the day to display the **Day Detail** editor.
2. Verify the correct day options are selected on each day of the calendar.
3. Add **Day Events** to represent specific events on the **Calendar**. This is optional in Montana.

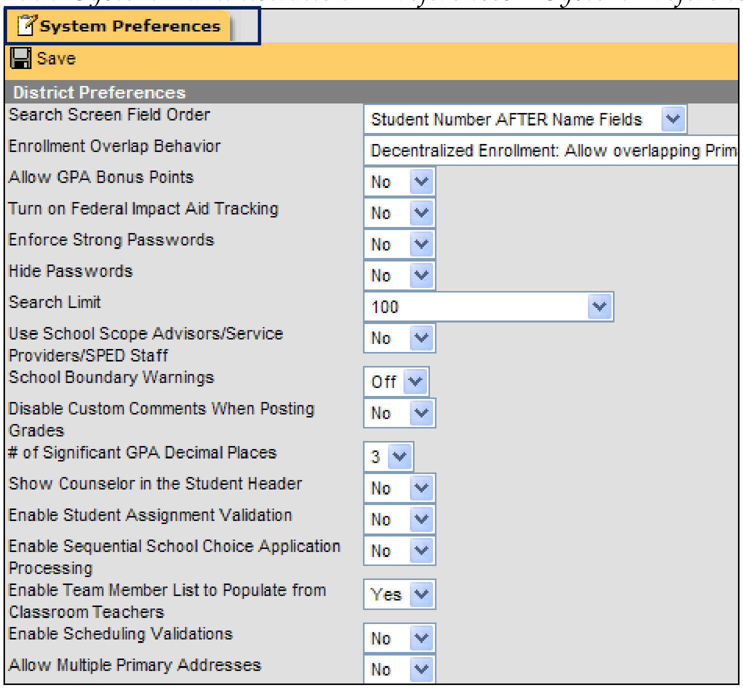


4. Click the **Save** icon when finished.

Preferences

The Preferences folder of System Administration includes options that set how Campus will work for all users of the system. The following settings are recommended:

Path: System Administration > Preferences > System Preferences



Required System Preferences

- **Enrollment Overlap Behavior** governs the system's behavior when a student has two primary enrollments. Montana currently requires districts to use the Decentralized Enrollment option.

Recommended System Preferences

- **Search Screen Field Order** will set the order of fields on the Advanced Search for students.
- **Enforce Strong Passwords** enforces the use of numbers, alpha characters and symbols when setting a password for a user.
- **Hide Passwords** will remove passwords from the User Account page of User Security. An administrator may still change passwords, but will not be able to see any passwords.

Optional System Preferences

- **Allow GPA Bonus Points** will allow the system to calculate bonus points for specific grades towards the cum GPA calculation.

- **Search Limit** will restrict all Campus users in terms of the maximum number of search results the system will return. This requires users to search for more particular items in order to avoid creating unnecessarily large searches that impact server performance.
- **School Boundary Warnings** will warn the Campus user when completing the enrollment roll forward process that students who do not live in the set boundary as determined by their household address will not roll forward to a particular school.
- **Disable Custom Comments When Posting Grades** determines if a teacher may enter custom comments on a report card or not.
- **# of Significant GPA Decimal Places** determines how many decimal points the calculation for GPA will round to and display in the system.
- **Enable Team Members List to Populate from Classroom Teachers** will add a Fetch Teachers button to the Team Members tab of Special Education. Clicking it will add all teachers who teach that student to their Special Education team. **NOTE: Scheduling of courses and sections and assigning teachers to sections is required for this option to be applicable.**
- **Enable Scheduling Validations** causes all users to receive a warning in the Walk-In Scheduler when deleting or end-dating a course IF their action results in a gap in the student's schedule.

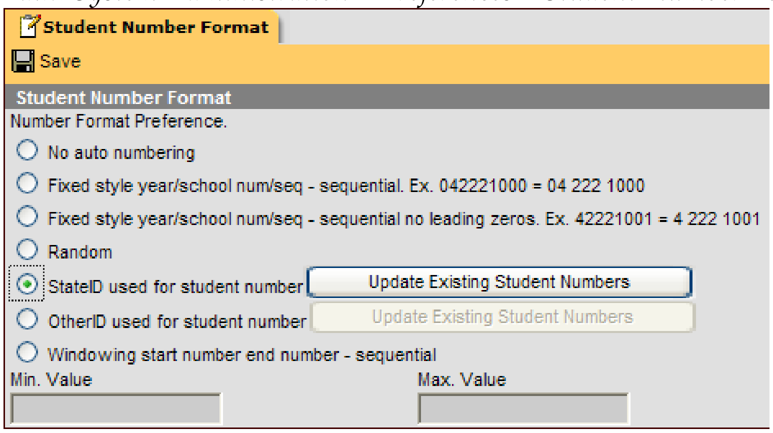
Not Applicable System Preferences

- **Turn on Federal Impact Aid Tracking** is not available in the Montana Edition.
- **Use School Scope Advisors/Service Providers/SPED staff** is not available in the Montana Edition.
- **Show Counselor in Student Header** is not available in the Montana Edition.
- **Enable Student Assignment Validation** is not available in the Montana Edition.
- **Enable Sequential School Choice Application Processing** is not available in the Montana Edition.
- **Allow Multiple Primary Addresses** is not available in the Montana Edition.

Student Number Format

The Student Number Format, selected from System Administration, is used when a new student is added and the user checks the option to auto-generate a number OR enrolls a person who does not have a student number.

Path: System Administration > Preferences > Student Number Format

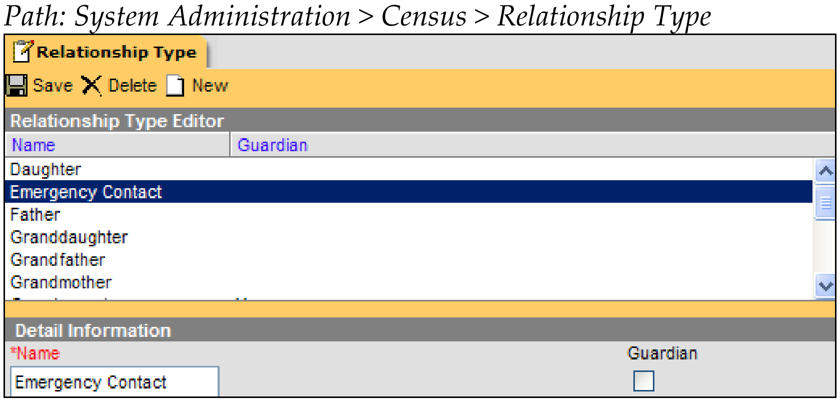


Select the "State ID used for student number" option. Make sure to update existing student numbers the first time the database is live if selecting this option. This number will display when searching for students in the Outline.

Census Relationship Types

Relationship types used in the Census module are defined at the district level.

Path: System Administration > Census > Relationship Type



If selected, the Guardian checkbox will indicate in the Student Summary tab that the person is a guardian. If a Relationship Type entered always refers to a guardian, mark this checkbox. A guardian relationship will still need to be established between the student and guardian on the Relationships tab or within the Census Wizard.

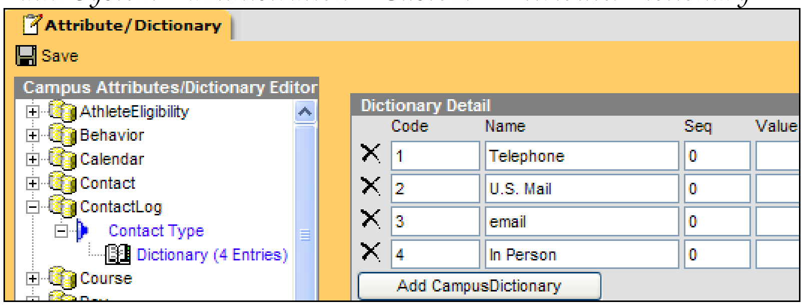
Instructions to Create a New Relationship Type

1. Click **New**.
2. Enter the description of the relationship in the **Name** field.
3. If this relationship should always be granted guardian rights, mark the **Guardian** checkbox.
4. Click **Save**.

Attribute Dictionary

The Attribute/Dictionary allows the system administrator to customize specific dropdown lists within the Campus product. Some dictionary items will be hard-coded due to the state reporting requirements.

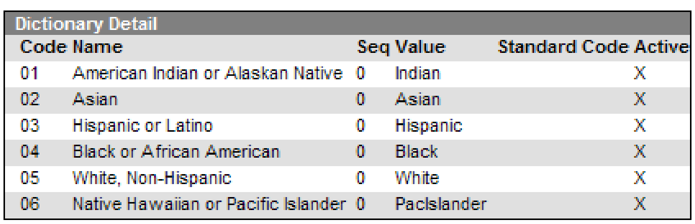
Path: System Administration > Custom > Attribute/Dictionary



Instructions to Edit Attribute/Dictionary Types

1. Expand the tool from the Attribute/Dictionary editor.
2. Expand to the item and to the defined dictionary entries.
3. Add to and/or edit the dropdown lists.
4. Click **Save**.

Hard-coded dictionary items will display; however, the user will not be able to edit this information.



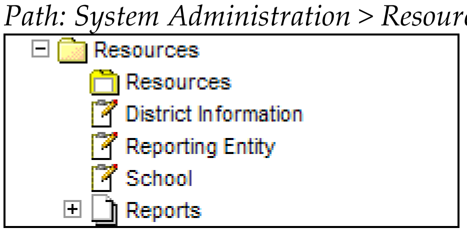
Dictionary Detail

Code	Name	Seq	Value	Standard Code	Active
01	American Indian or Alaskan Native	0	Indian		X
02	Asian	0	Asian		X
03	Hispanic or Latino	0	Hispanic		X
04	Black or African American	0	Black		X
05	White, Non-Hispanic	0	White		X
06	Native Hawaiian or Pacific Islander	0	PacIslander		X

Resources

The Resources folder contains basic information about the district and schools within the district. The fields defined in school and district set up are used in state reporting and are available to use in the Ad Hoc Reporting tool.

Path: System Administration > Resources



District Information

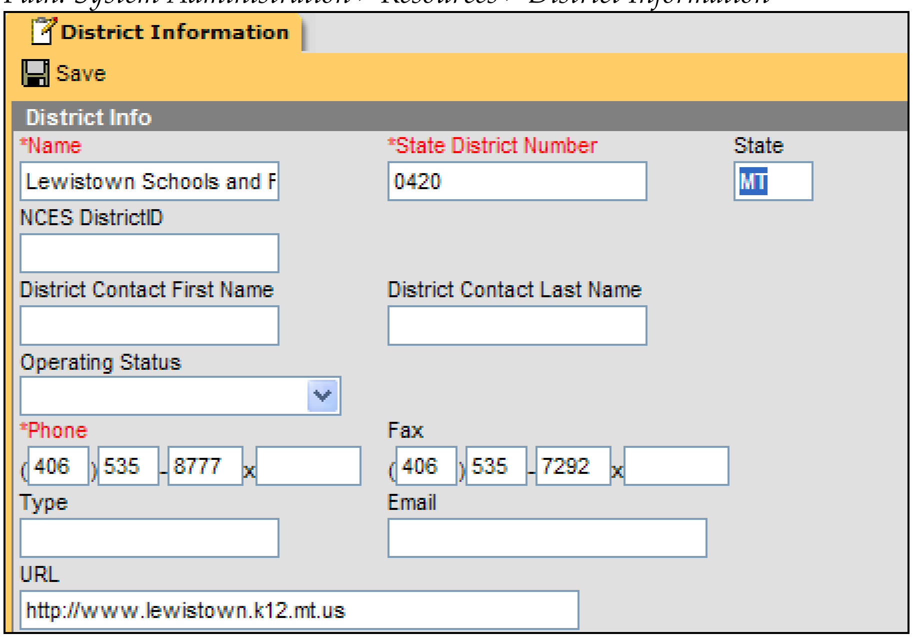
The District Information editor contains your school system information. This information is displayed on reports and state reporting extract headers. In Montana, the Name and State District Number reflect the legal name and system code (Ss) assigned by the OPI.

Instructions to Entering District Information

Some data elements on this screen are designated by the state and are view only.

1. Enter the State Reporting or SIS Administrator First and Last Name in the **District Contact** fields.
2. Enter the appropriate phone numbers, **Email** address, district **URL** and mailing address.
3. Enter the district's Special Education administrator or director as the **SPED Contact**. This information will be available in Ad Hoc Reporting and as field names that will pull on to Active FDFs.
4. When finished editing the district information, click **Save**.

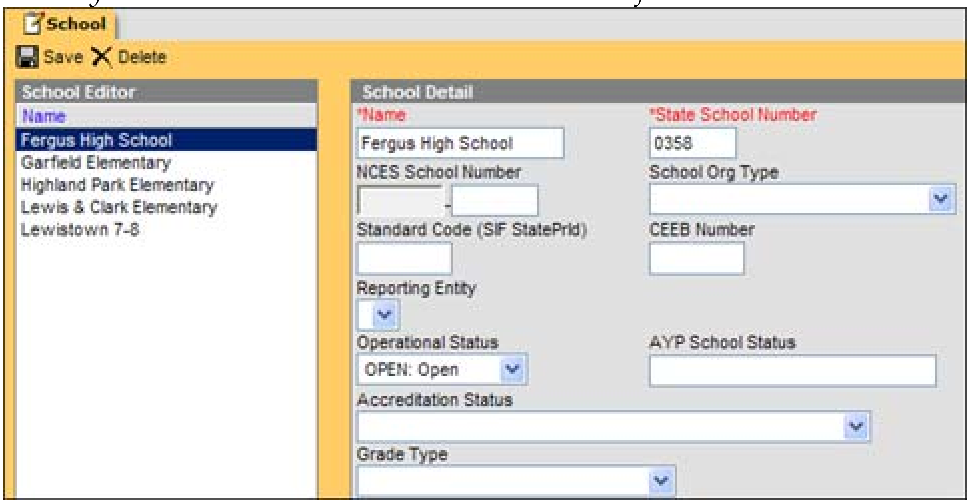
Path: System Administration > Resources > District Information



School Information

The School editor contains a selected school's information. This information is displayed on reports and state reporting extract headers. In Montana, the Name and State School Number reflect the legal name and school code (Sc) assigned by the OPI.

Path: System Administration > Resources > School Information



Instructions to entering School Information

Some data elements on this screen are designated by the state and are view only.

1. Enter the contact information for the school.
2. Enter the mailing address for this school. The address will be used in reports.
3. OPTIONAL: Enter the school's **CEEB** (College Entrance Exam Board) **Number**, also known as the SAT number for all relevant schools.
4. Click **Save**.

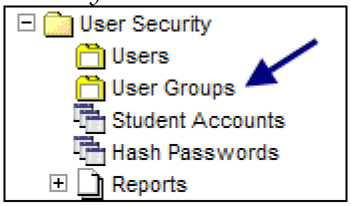
User Security

The User Security folder includes options for user and user security setup, including staff accounts for access to the Campus application and Portal accounts.

User Groups

User rights can be maintained on individual accounts or by creating user groups. Creating two types of groups (tool right and calendar groups) and maintaining rights at the group level is recommended, even if a particular user group consists of only one member. This will simplify the process of assigning user rights if that staff member leaves the district. The new employee in that role can be made a member of the same group(s) and his/her profile will exactly match the previous employee's access. Membership in user groups is additive; rights from the different groups will be added together to create the users' access to tools in Campus.

Path: System Administration > User Security > User Groups



Calendar Rights – Determine the year(s) of data within one or more schools a user will be able to access. Access may be set to read-only or full access. Setting the current year to full access (modify rights) will allow the user to enter and maintain data, provided they have sufficient tool rights. Historical years are typically set to read-only.

Tool Rights – Determine which tools in the index outline a user will have access to read and/or enter data depending on the user's calendar rights.

Example:

As shown by the chart below, teachers at West High School could be members of the teacher tool group and the 08-09 calendars at West High School, while the teachers at North High School would be members of the same teacher tool group and the North High calendar group. Principals at North would be members of the principal tool group and North High current year. Principals could also be a member of a read-only group to be able to look at the data of prior years.

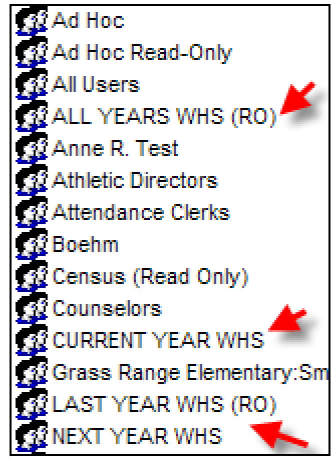
Calendar Group	Teacher Tool Right Group	Principal Tool Right Group
08-09 WHS	WHS Teachers	WHS Principals
08-09 NHS	NHS Teachers	NHS Principals
All Years (Read Only)		WHS Principals NHS Principals

The types of user groups and levels of access each group includes will differ from district to district.

Calendar Groups

Calendar groups are a specialized type of user group setup. Calendar groups provide members access to data in specific schools and years. Creating a calendar group requires the same steps as setting up a user group. Campus recommends that a well-defined naming convention be established when creating calendar groups.

Method 1:
Create and name calendar groups with descriptive names to represent different years of data users may need access to as follows:

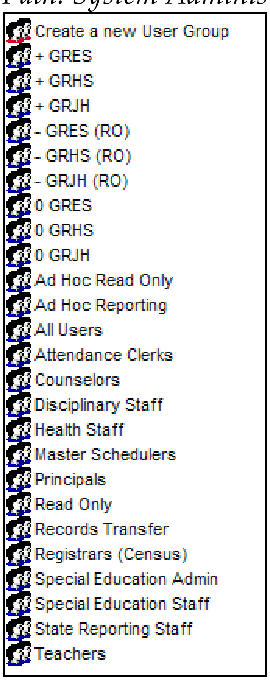


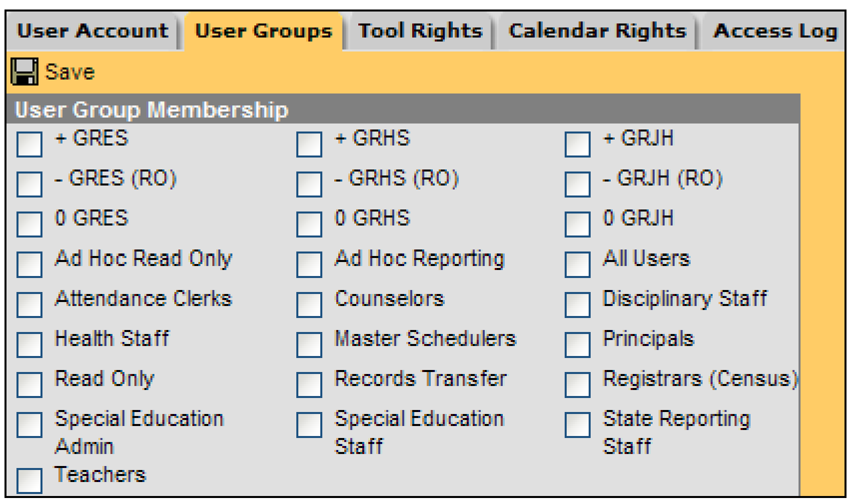
All Years WHS (RO) – Represents read-only access to all historical year data to West High School.
Current Year WHS – Represents full access to the current year data to West High School.
Last Year WHS (RO) – Represents read only access to the previous year's data to West High School.
Next Year WHS – Represents full access to next year's data (often provided to schedulers) to West High School.

NOTE: A descriptive naming convention will sort alphabetically, mixing calendar and tool right groups together in the Campus Outline and User Account and Group Workspaces.

Method 2:
Beginning calendar group names with a symbol or numeric value, representing the different years of data that users may need access to, will allow for sorting calendar groups separately from tool right groups in the Campus outline, as well as on the user account and group work spaces.

Path: System Administration > User Security > Users > User Groups

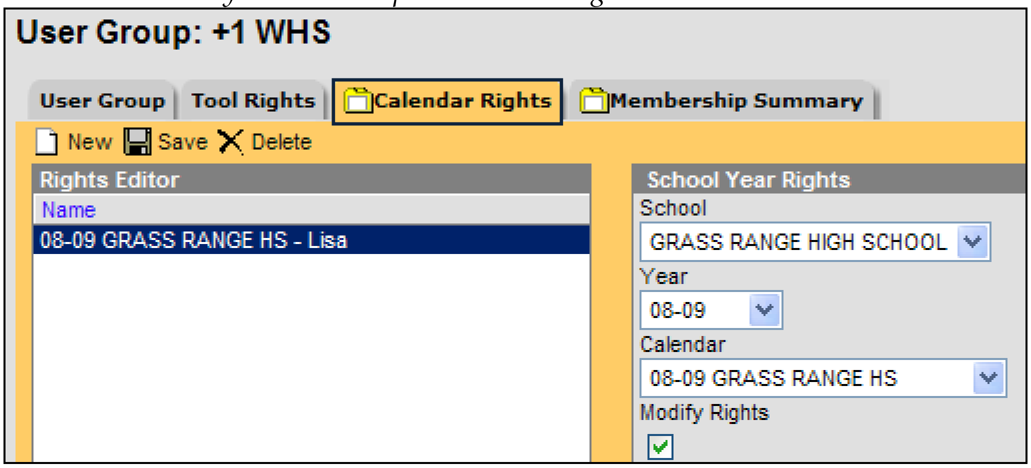




Calendar Rights

Calendar rights are established on a calendar group or on the individual's account. Infinite Campus recommends that calendar groups be used in all cases for easy maintenance from year-to-year.

Path: User Security > User Groups > Calendar Rights



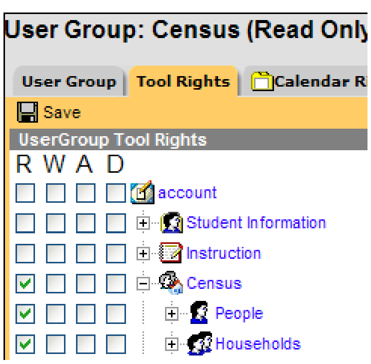
Instructions to set Calendar Rights

1. Select the **Calendar Rights** tab on the Calendar Group.
2. Click **New**.
3. Select a **School** or All Schools from the dropdown list.
4. Select a **Year** or All Years from the dropdown list.
5. Mark the **Modify Rights** checkbox to allow data to be modified in the selected school and year. Leave the Modify checkbox unmarked if read-only access to the selected school and year is needed (e.g., a historical year).
6. Click **Save**.

Tool Rights

Select the Tool Rights tab to set tool access for a defined User Group. Four levels of access are available for most tools in Campus, defined as follows:

Path: System Administration > User Security > User Groups > Tool Rights



R – Read allows each user assigned to the group to view the data.
W – Write allows each user to modify existing data.
A – Add allows each user to create new records.
D – Delete allows each user to delete records.

Tool rights are hierarchical; selecting the top level will fill in all levels in a particular module. For example, if **R** is marked for the Census module, the group will have read rights to all tools in the Census module. Deselecting specific checkboxes at the lower level within that module will hide access to those items from the group.

Instructions to set Tool Rights

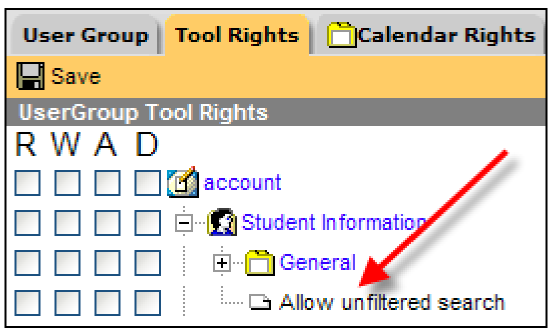
1. Expand the module to view all possible **Tool Rights**.
2. Mark the applicable checkboxes for the level of access the **User Group** should receive.
3. Click **Save**.

NOTE: Setting and changing tool rights in Campus the application will query all tables to determine what tools are available; therefore this page will take longer to load in the Workspace.

System Administrators need to be aware of state and federal data privacy laws regarding what information users have access to view.

*A **Filtered Search** will restrict users in a group to only view student information for those assigned to their course section or caseload.*

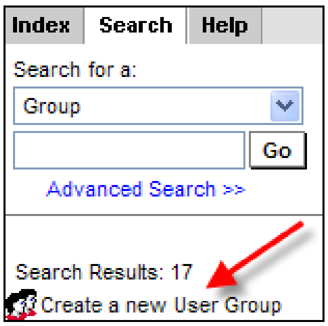
*The **Allow Unfiltered Search** tool right should only be selected on a group if all members within that group should have access to all student information (e.g., counselors, office staff, and principals).*

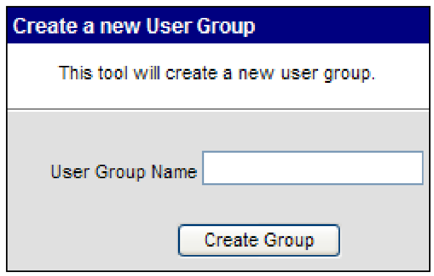


NOTE: When new tools or reports are added to the Campus system, tool rights will not automatically be given to groups who need access to these added features, unless a user has All Tools, All Calendars set on their user account. The system administrator will need to give rights to the new tools to all user groups who need access. For more information refer to the Standard User Rights Technical Reference available on the Customer Portal.

Instructions to Create a New User Group

1. Expand the System Administration module and the User Security folder.
2. Select **User Groups**.
3. Campus will automatically perform a search for existing user groups.
4. Click **Create a New User Group** listed at the top of the search results.
5. **Enter a Name** for the group. This name should be descriptive of the access this group will control.
6. Click **Create Group**.

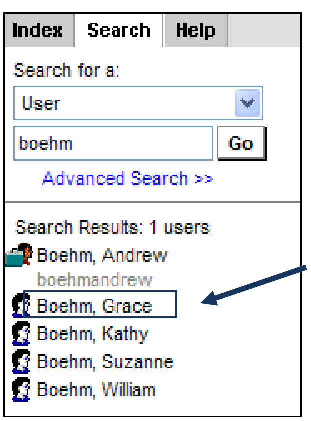




User Accounts

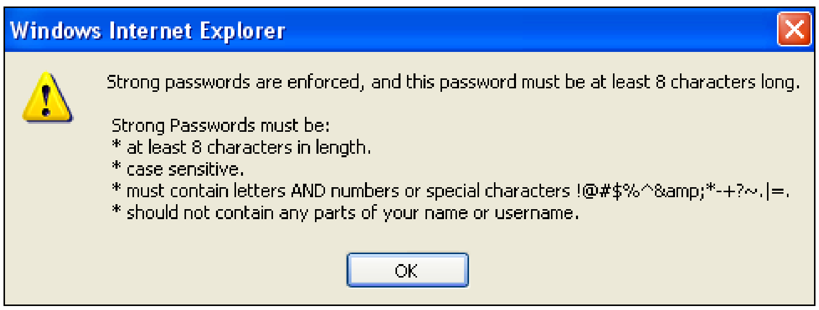
All people are potential users of the Campus Student Information System. Searching for a last name will display all parents, students and staff members with that last name. Established user accounts will display in gray below the person's name. To maintain an existing account, click on the gray account link from the Outline. To create a new account for a person, click on their name link from the Outline.

Path: System Administration > User Security > User Accounts

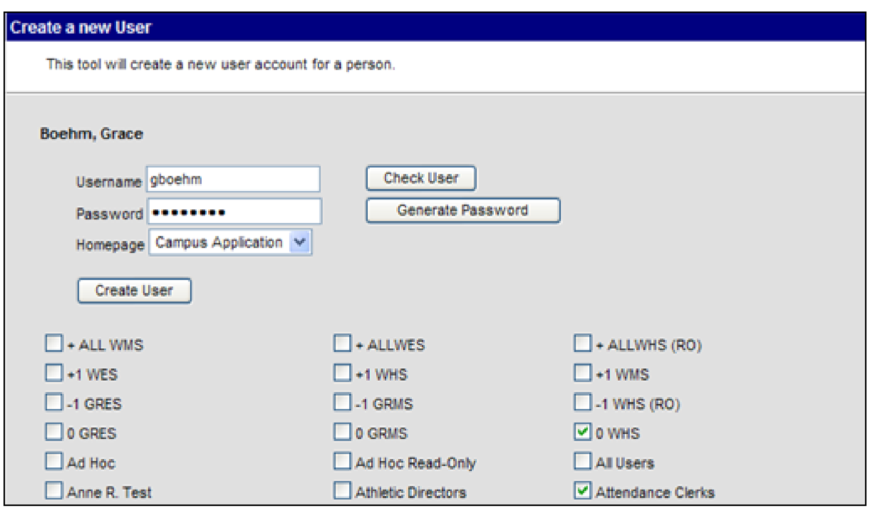


Instructions to Create a New User

1. Select the **Search** tab in the Campus outline.
2. Enter search criteria in the search box or use the Advanced Search options.
3. Click on the person's name in the Search Results.
4. Enter a user name according to your district's established naming convention for user accounts (e.g., internet domain name).
5. Enter a **Strong Password** or allow the system to **Generate Password**. Campus recommends enforcing **Strong Passwords**, if this is set up, the following warning will display if the user does not enter a password that follows the rules for **Strong Passwords**. **Note: To turn this warning on go to System Administration > Preferences > System Preferences and set the Enforce Strong Passwords to Yes.**



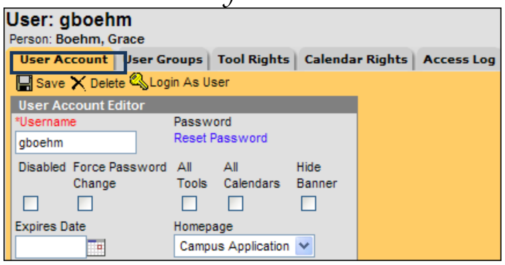
6. Select the appropriate **Homepage** option. Campus Application is selected if this account is for a district or school faculty member; Campus Portal is selected for parents and students. District staff members who are parents will have two Campus logins: one for the Portal and one for the Campus application.
7. Click **Create User** to generate the user's account.
8. A pop-up message will appear with either the above Strong Password warning or a message that states "Username OK".
9. Either fix the Password and repeat step 8 or select OK on the "Username OK" message.



Establishing and Maintaining User Accounts

The options available on user accounts assist the Campus system administrator in establishing and maintaining proper user security. It is very important to understand the impact of each selection on an individual's user account.

Path: User Security > Users > User Account



- **Disabled –** Is automatically checked if a user's password has been incorrectly entered five times on the log in screen. To re-enable the account, uncheck this box and click **Save**.
- **Force Password Change –** Requires the user to change their password at their next login. Once the password is changed, this box will be unchecked.
- **All Tools –** Provides the user full access to all tools in the Campus system for each school calendar the user has rights to enter data in.
- **All Calendars** – Provides the user with full access to all school calendars to use the tool rights assigned.

Only the District's System Administrator should have All Tools/All Calendars rights to the AIM Montana Edition.

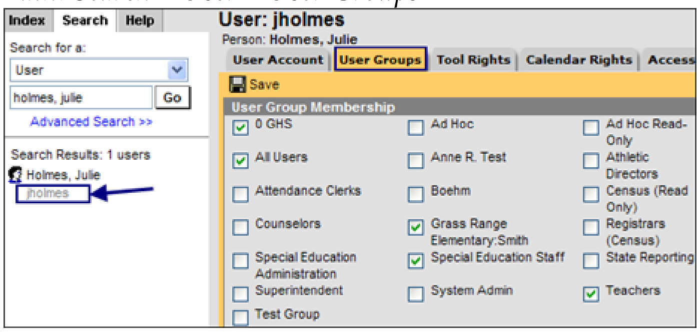
- **Hide Banner** – Will hide the Infinite Campus banner on the user's screen.
- **Expires Date –** Will automatically disable the account for the selected user at midnight on the entered date. This tool is often used to automate account management for temporary staff.
- **Generate Random Password –** Will replace the selected password with a strong random character password.
- **Login As User** – Will switch users to the selected user. The current user will be automatically logged out.

NOTE: If Hide Passwords is set up as a system preference, the user's password will not be visible. A Reset Password link will allow the user who creates user accounts to change the password of a user if it is forgotten.

User Groups

Maintaining a user's security to Calendar and Tool Rights is completed on the User Group tab for an individual user.

Path: Search > User > User Groups



To maintain a user's group memberships:

1. Search for the **User**, by selecting user from the **Search** tab and entering the last name, first name of the person, click **Go**.
2. Select the user's gray account link from the **Outline**.
3. Select the **User Groups** tab
4. Check or Uncheck applicable user groups
5. Click **Save**.

Tool Rights

Tool rights may be set up on an individual user; however, Infinite Campus recommends no tool rights be assigned to an individual. This simplifies the maintenance of tool rights.

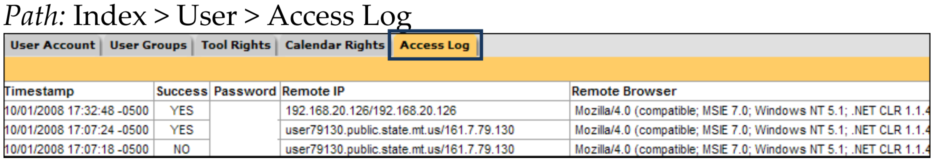
Calendar Rights

Calendar rights may be set up on an individual user; however, Infinite Campus recommends no calendars rights be assigned to an individual. This simplifies the maintenance of calendar rights.

Access Log

The users Access Log displays information regarding all login attempts, including timestamps, whether or not the attempt was successful, the password provided, the remote IP address where the login came from and the browser/version utilized to connect to the application server. This information is useful in investigating potential security violations and in verifying if an issue is occurring due to the use of a particular browser/version.

Path: Index > User > Access Log

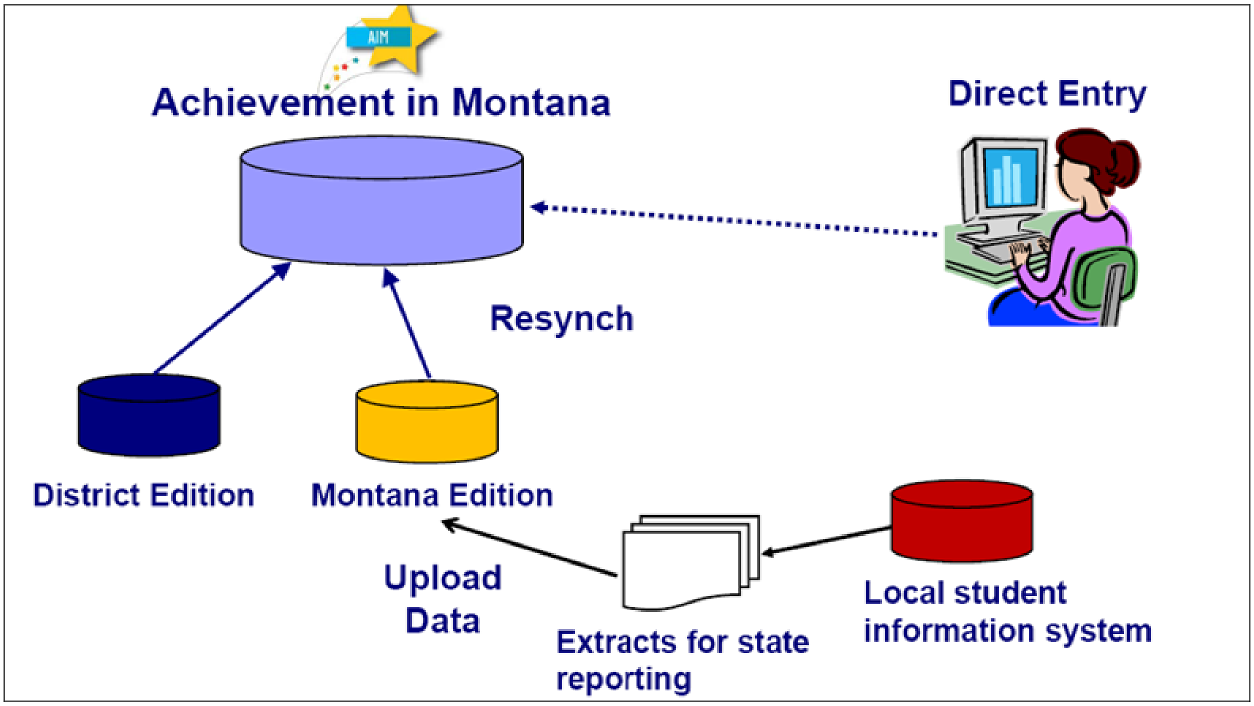


Chapter 5 – File Upload

This chapter provides information on how to prepare and upload data to the Montana Edition for state data collections.

Overview of the Process

Districts live on the Montana Edition will be able to extract their files from their local student information system and upload the data to the Montana Edition. Once the upload process is completed in the Montana Edition, districts using this technique will need to resync the data to AIM.



File Upload Specifications

Districts may create an import file to upload collection data to the Montana Edition. Once the upload process is completed the district will perform a resync of this data to the AIM State Edition. The OPI will provide complete instructions for creating an import file that meets the specifications prior to the collection date.

Demographic and Enrollment Upload Overview

There are seven steps to uploading student Demographic and Enrollment data to the AIM Montana Edition. This process will create and/or locate a state student ID for students and ensure that student data for each collection period is synced to the AIM State Edition. Detailed instructions of the upload and sync process follow this overview.

1. Create an import file for Demographic data.
2. Upload the Demographic data to the Montana Edition.
3. Download the State ID file created from the Demographic data Upload process.
4. Create an import file for Enrollment Data. **Note: For new students to the State of Montana include the State IDs provided by the Demographic Data File in the Enrollment import file.**
5. Upload the Enrollment data to the Montana Edition.
6. Complete a Full Resync to the AIM State Edition.
7. Verify the Resync to the AIM State Edition was successful.

You must complete both the Student Demographic AND Enrollment file uploads before you are able to locate the student in the AIM Montana Edition.

Demographic Upload Process

The steps that follow represent the Demographic file upload process for districts that will extract the student demographic data from their current student information system and import this data into the Montana Edition.

MT State Reporting Upload

The district will create an import file that meets the state required file specifications to import demographic data of students new to the district to the Montana Edition. Students new to the state of Montana will receive a SSID by completing this process.

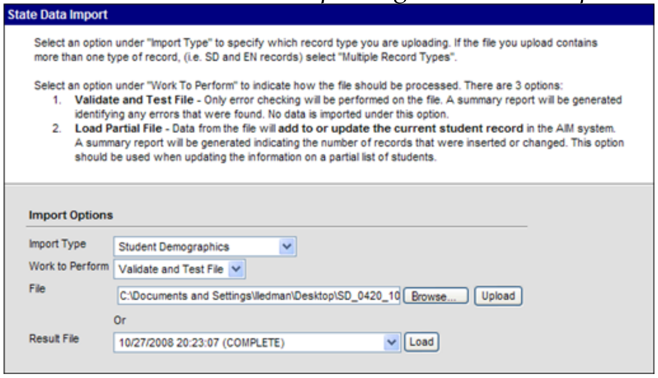
Instructions to Perform a File Upload

A successful demographic data file upload requires the district to validate and test the import file, correct any errors in the data file, load a partial file, verify the data uploaded correctly, and download the state ID file generated.

Validate and Test

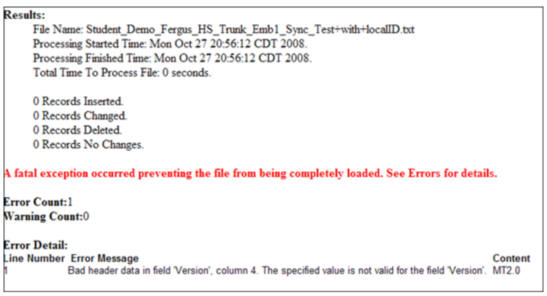
1. Navigate from the **Index** of the **Outline** to MT State Reporting > MT Data Upload.
2. From the **Import Type** select *Student Demographics*.
3. Select *Validate and Test File* from the **Work to Perform** dropdown list.
4. Browse for the import file located on your network or workstation.
5. Select the **Upload** button.

Path: Index > MT State Reporting > MT Data Upload



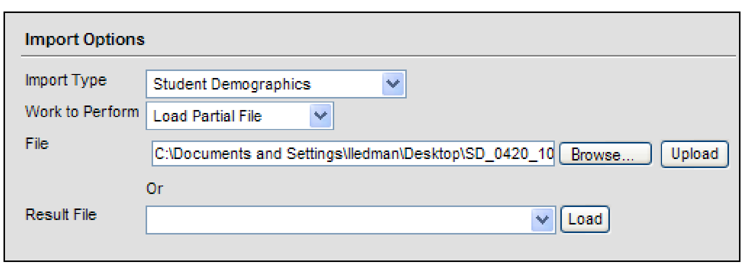
Correct any Errors in the Data File

1. The error results screen will list line numbers and describe the error for each line.
2. Correct data errors in the import file.
3. Continue to validate and test the file until no errors are received.



Upload a Partial File

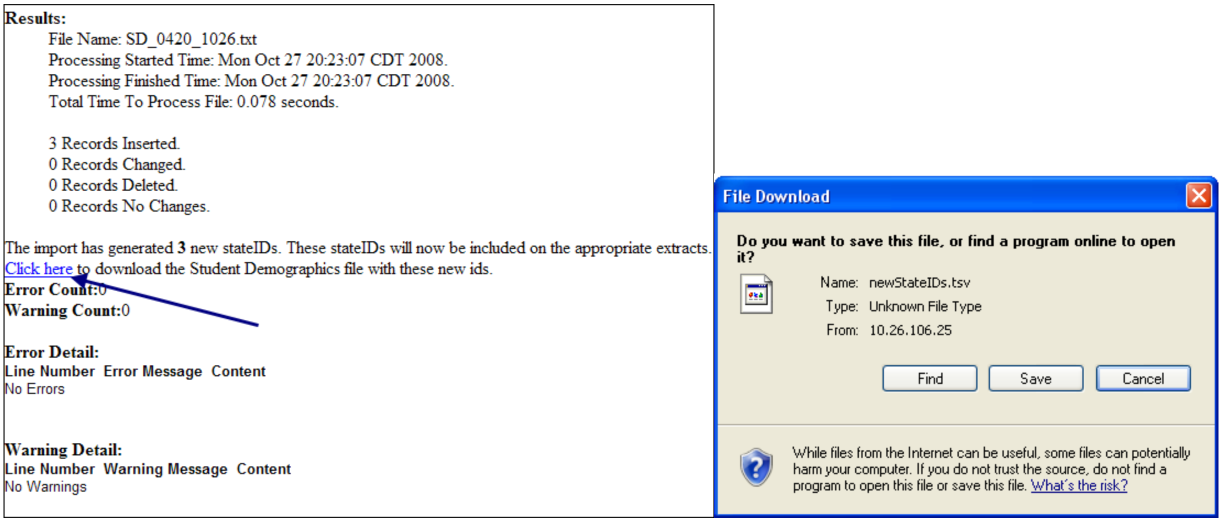
1. From the **Import Type** select *Student Demographics*.
2. Select *Load Partial File* from the **Work to Perform** dropdown list.
3. Browse for the import file located on your network or workstation.



*Contact the OPI AIM Help Desk prior to selecting **Load Complete File** from the Work to Perform dropdown list. Loading a complete file will erase all data previously entered or imported.*

Download the State ID File

1. Select the **Click here** link on the Results screen to download the student demographics file with the new state student IDs.
2. Save the State ID file to your network or workstation.
3. Import the state student IDs to your local student information system.



NOTE: The State ID file will provide the state student IDs required in the student Enrollment import file.

Enrollment Upload Process

The steps that follow represent the Enrollment file upload process for districts that will extract the student enrollment data from their current student information system and import this data into the Montana Edition.

MT State Reporting Upload

The district will create an import file that meets the state required file specifications to import Enrollment data of students to the Montana Edition.

NOTE: For new students to the State of Montana State IDs provided by the student Demographic upload process will need to be included in the student Enrollment import file.

Instructions to Perform a File Upload

A successful enrollment data file upload requires the district to validate and test the import file, correct any errors in the data file, load a partial file, and verify the data uploaded correctly, and complete a full resync.

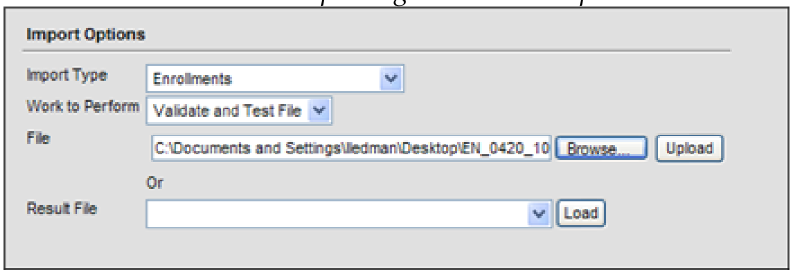
NOTE: Instructions to complete a full resync and verify the data in State Edition is included in the *Full Resynchronization of Data to AIM* section located at the end of this chapter.

Validate and Test

1. Navigate from the **Index** of the **Outline** to MT State Reporting > MT Data Upload.
2. From the **Import Type** select *Enrollment.*

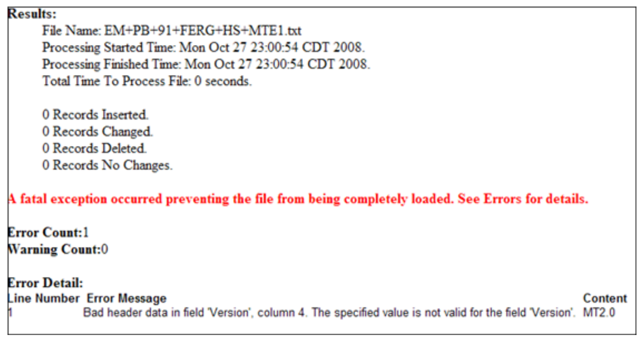
3. Select *Validate and Test File* from the **Work to Perform** dropdown list.
4. Browse for the import file located on your network or workstation.
5. Select the **Upload** button.

Path: Index > MT State Reporting > MT Data Upload



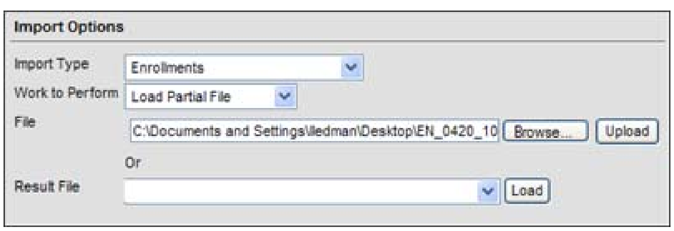
Correct any Errors in the Data File

1. The error results screen will list line numbers and describe the error for each line.
2. Correct data errors in the import file.
3. Continue to validate and test the file until no errors are received.

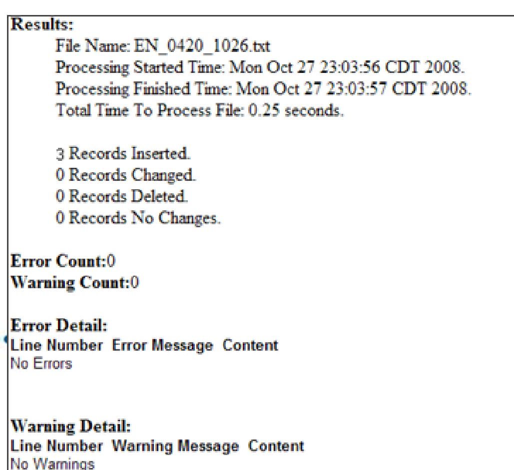


Upload a Partial File

1. Select the *Enrollment* **Import Type** from the dropdown list.
2. Select *Load Partial File* from the **Work to Perform** dropdown list.
3. Browse for the import file located on your network or workstation.



Results of Successful File Upload



The results screen will indicate how many records were successfully inserted, changed, deleted, or resulted in no changes.

After uploading the student demographic and enrollment import files, a full resync of data is required. Data from the AIM Montana Edition will not be reported to the AIM State Edition until this process is completed. Follow the instructions as described in the Full Synchronization of Data to AIM section located at the end of this chapter.

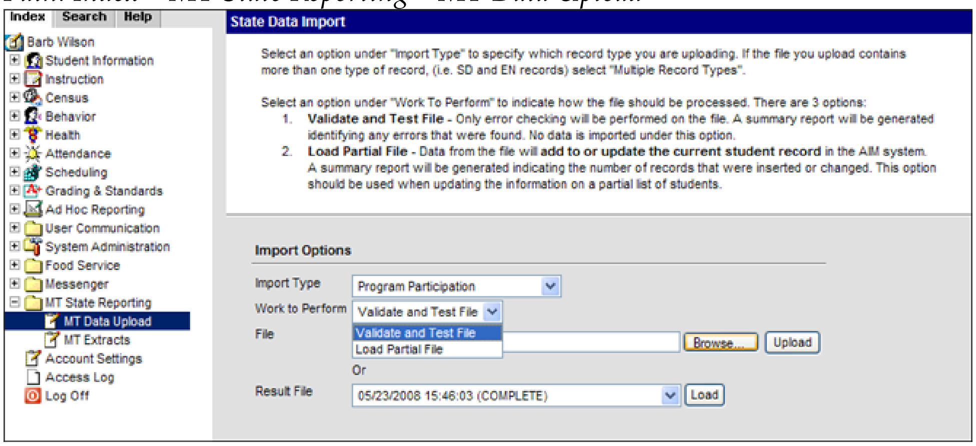
Other File Upload Processes

The steps that follow represent other file uploads required for state reporting by the OPI. The process is the same with all file uploads; the example in this document demonstrates the steps with the Program Participation file upload.

MT State Reporting Upload

The district will create an import file that meets the state required file specifications prior to the collection date. A file upload will be performed for each data collection in the Montana Edition.

Path: Index > MT State Reporting > MT Data Upload



Instructions to Perform a File Upload

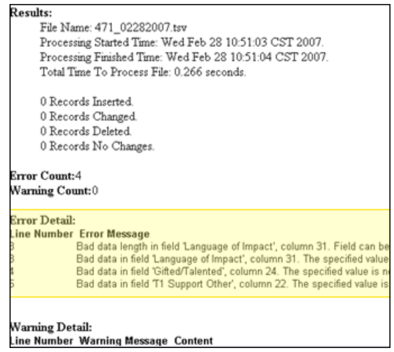
A successful file upload for each collection requires the district to validate and test the import file, correct any errors in the data file, load a partial file, verify the data uploaded correctly, and resync the uploaded data to the AIM State Edition. These steps need to be completed by the collection date determined by the OPI.

Validate and Test

1. Navigate in the **Outline** to the MT State Reporting folder and select the MT Data Upload.
2. Select the applicable **Import Type** (e.g., *Program Participation*) from the dropdown list.
3. Select *Validate and Test File* from the **Work to Perform** dropdown list.
4. Browse for the import file located on your network or workstation.
5. Select the **Upload** button.

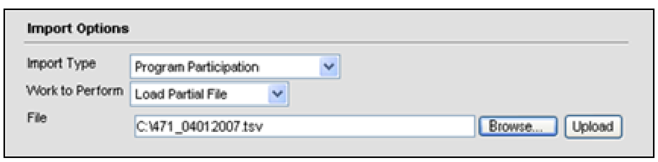
Correct any Errors in the Data File

1. The error results screen will list line numbers and describe the error for each line.
2. Correct data errors in the import file.
3. Continue to validate and test the file until no errors are received.



Upload a Partial File

1. Select the appropriate **Import Type** (e.g., *Program Participation*) from the dropdown list.
2. Select *Load Partial File* from the **Work to Perform** dropdown list.
3. Browse for the import file located on your network or workstation.



Contact the OPI AIM Help Desk prior to selecting ***Load Complete File*** *from the Work to Perform dropdown list. Loading a complete file will erase all data previously entered or imported.*

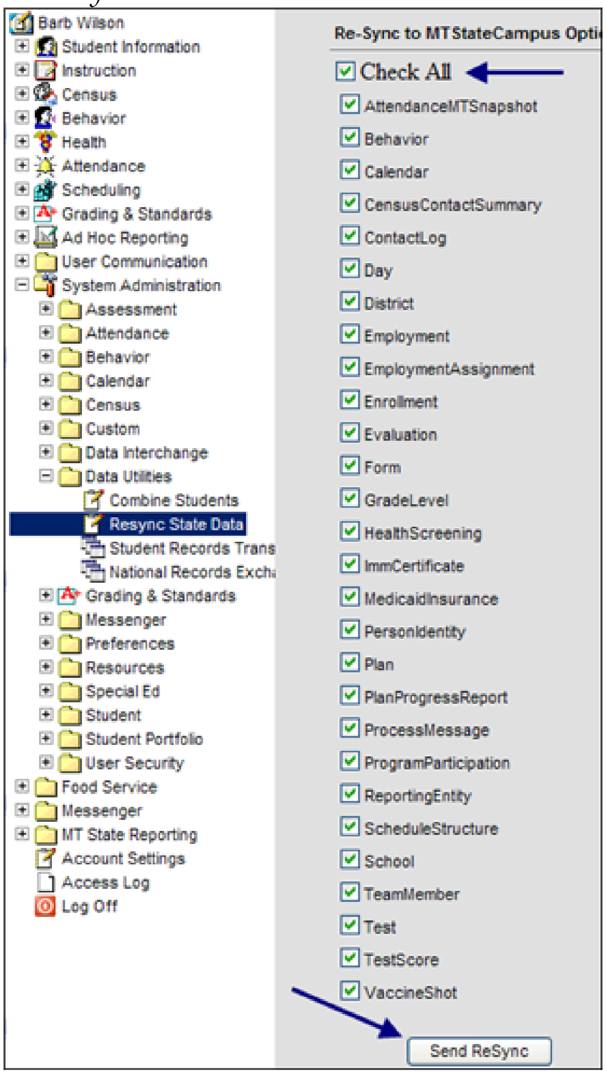
Import Results Summary

The **Import Results Summary** screen will display the number of records that have been inserted, changed and/or deleted, as well as the number of records that have not been changed.

Full Resynchronization of Data to AIM

In the AIM Montana Edition, data is structured in object hierarchies based on database dependencies. When a district resyncs the entire set of data available on the Resync State Data tool the process will naturally consider these dependencies. Campus recommends a full resync be performed after successfully uploading any data using the MT Data Upload tool.

Path: System Administration > Data Utilities > Resync State Data



To complete a full resynchronization of data after the upload process is complete, follow these steps:

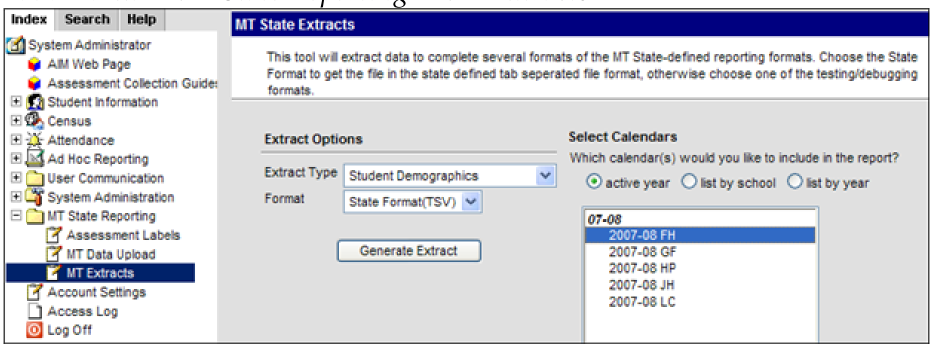
1. Select **Resync State Data** from the **Index** tab of the **Outline**.
2. Mark the **Check All** checkbox.
3. Select the **Send ReSync** button.

Verification of Resync Process in the AIM State Edition

MT Extracts and Ad Hoc Filters are available in the AIM State Edition to determine if the resync was successful and assist in verifying data accuracy prior to a collection due date.

NOTE: If data does not sync to the AIM State Edition within a 3 hour window, contact your district's Infinite Campus Support Contact who should create a ticket and call Campus Support for assistance.

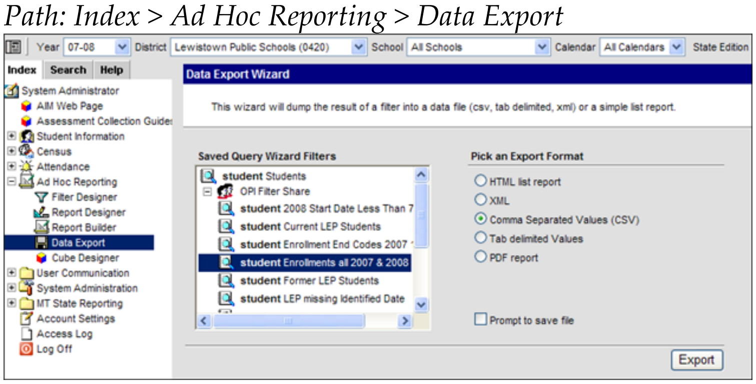
Path: Index > MT State Reporting > MT Extracts



Instructions to Extract Collection Data

1. Navigate in the **Outline** to the MT State Reporting and select Extracts.
2. Select the **Extract Type** (e.g., *Enrollments, Program Participation, etc.*).
3. Select the appropriate **Format** from the dropdown list.
4. Click **Generate Extract**.

Path: Index > Ad Hoc Reporting > Data Export



Instructions to Generate an Ad Hoc Data Export

1. Select the Year, District, School, and appropriate Calendar from the **Campus Toolbar**.
2. Navigate in the **Outline** to Ad Hoc Reporting and select Data Export.
3. Select the appropriate Ad Hoc Filter located in the School Users Share folder.
4. Select the appropriate **Export Format** from the dropdown list.
5. Click **Export**.

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