Take Stock in Children

# TAKE STOCK DATABASE

Reference Guide

May 14, 2007

TAKE STOCK IN CHILDREN®

# Getting Started

## Opening The Database

1) Click on the **Take Stock Database** icon on your computer desktop.
2) Enter your username and password when prompted. FileMaker will open automatically after a few seconds.
3) Once FileMaker opens, clear any dialog box that is displayed and click on the **File** menu and select **Open Remote**.
4) In the **Hosts** box select *Take Stock Databases*.
5) Select the *TakeStock Database* file from the **Available Files** box.
6) Click the Open button.
7) Enter your username and password again.

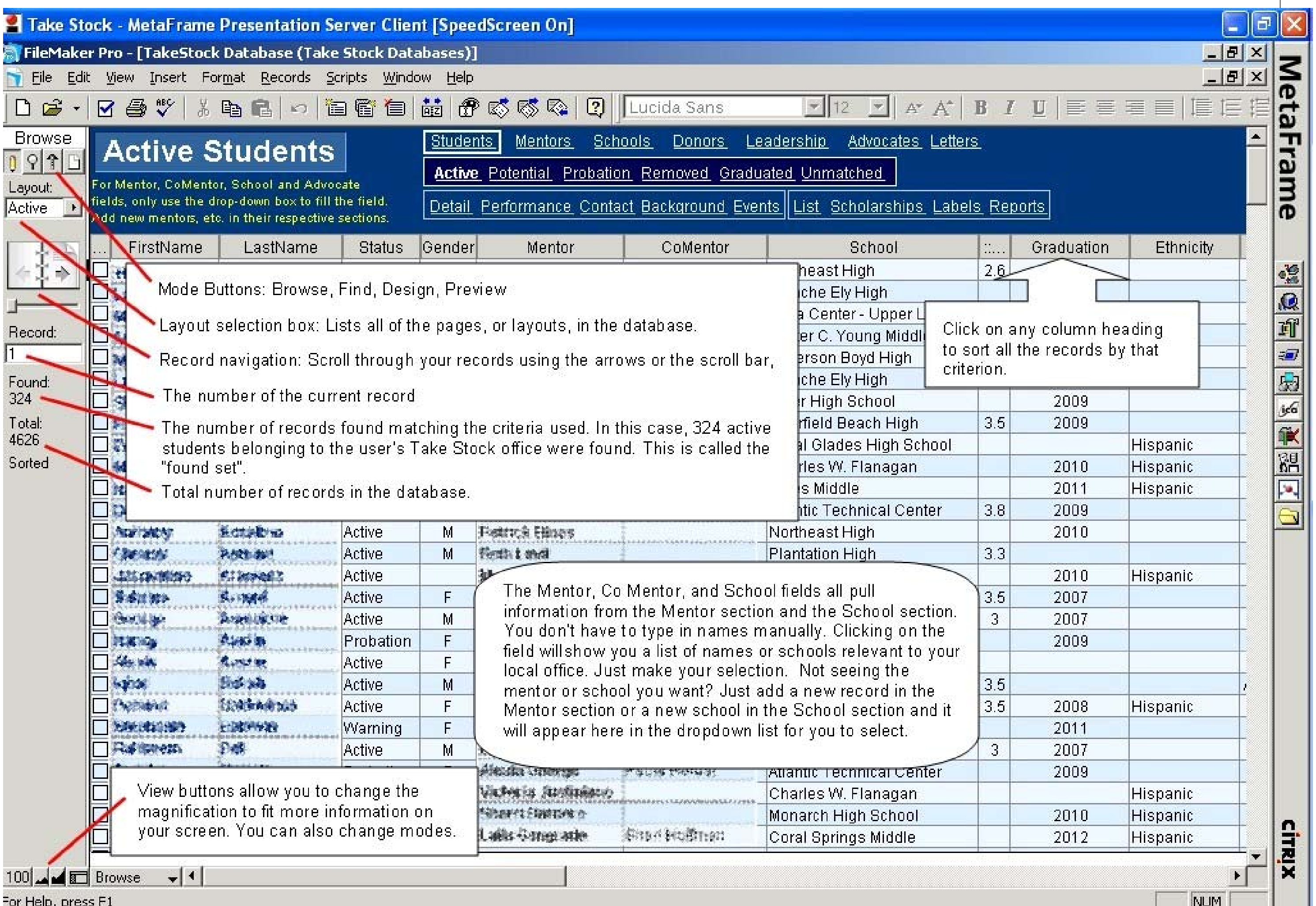
*Tip:* Once you open the database file, you will be able to use the **Open Recent** selection on the File menu, rather than **Open Remote**, the next time you want to use the database. That'll be a little quicker.

## Using the Database

The Take Stock in Children database is run by a program called FileMaker. FileMaker is run on our central computer in Fort Lauderdale and it allows many people to use and interact with the database simultaneously. Any changes made in the database can be seen instantly by others using the system. So all of your data is always the latest available.

The first screen you will see is the Active Students screen. It is set to show you only the active students from your local Take Stock program. Across the top of the screen you will see links to all of the other major areas of the database; Students, Mentors, Schools, etc. Each one of those areas is set to automatically show you the records just for your local program.

Along the left hand side of the FileMaker window you will see some important buttons. The button with the pencil icon is Browse mode. That is the default mode that allows you to browse through your records. The next button, the little magnifying glass, is the Find mode. That mode lets you search for records based upon criteria you choose. The




next button, which looks like a t-square, is the design mode. That mode is reserved for people with permission to change the look of the database. And finally, the button with the paper icon is the Preview mode. That mode is a print preview mode that shows you what the screen will look like when printed.

Below those mode buttons is the Layout dropdown list. Each screen in the database is called a layout and you can go directly to any layout by selecting it from the dropdown layout list.

Underneath the layout list is an icon that looks like an open book with arrows on the pages. You can navigate through your records by clicking on the arrow buttons or use the little slider below them.  You can even go directly to a record by entering a number in the Record box.  This navigation section is more useful when you are viewing a record detail screen. In the picture above, the records are being displayed in a spreadsheet view, but you can also view individual records in detail, one at a time. The navigation buttons really come in handy then.

## Viewing Your Data

Most sections of the database have two basic layout types. One view is the spreadsheet view, that shows you many records at the same time. The Active Students layout that the database starts up in is an example of the spreadsheet view (also known as a table view).

The second type of layout is a detail layout. The detail layout displays one record at a time with many data fields all on one page.  Students, Mentors, Schools, Donors, and Leadership sections all have a detail layout.

You will see a link on the database menu that says **Detail**. The detail layout is probably the easiest layout to use when you are working with an individual record, creating a new record, or making modifications to a record.

## Finding Information

The numbers underneath the Record section tell you the record number of the record currently being browsed, the number of found records and the total number of records in the database. The number of found records is called the "**found set**". This is an important concept in FileMaker. A found set is a set of records that are the result of looking for records matching particular criteria. For example, the Active Student screen automatically searches for student records that have your office code in them and also have a status of Active, Warning, or Probation. The found set then is all active students belonging only to your  office. Found sets are used to generate letters, labels, and some reports. You can manually find records based upon criteria that you choose by entering Find mode and specifying the search criteria you want.

## Finding Records

1) Go to a layout that contains the fields you want to search for.
2) Enter Find mode by clicking the icon that looks like a magnifying glass in the left column of the database window. You can also press Ctrl-F or go to the View menu and select Find Mode.
3) The layout you are working on will give you a blank record. Enter any search criteria in as many of the fields as you want.
4) Click the Find button on the left column of the database window.

*Important Note:* Make sure you enter your county in the County field whenever you do any find so that you limit the found records to only those that pertain to your program. If your program manages multiple counties, either use the Add New Request to search for another county at the same time or simply enter your program's Ocode (office code) in the Ocode field. (You program's Ocode is shown in the records of the Active students screen).

*Exmples:* To find all the male students in your program who are on probation, enter M in the Gender field, select Probation in the status field and select your county in the County field, Then click the Find button.

*Tip:* You can perform wildcard searches using *, ?,<,>,=. For example, to find all last names that start with an S, enter S in the Last Name Field. To find students graduating after 2009, enter >2009 in the Graduation field. See Help in FileMaker for more info on Finds.

## Complex Finds

Say you want to find all student records that have a status of either Probation or Warning. Since you can only select one status at a time in the Status field, when you are in Find mode you can ask FileMaker to give you another blank record to enter the additional status. Then your found set will contain records with both statuses.

## Finding Records Using Multiple Requests

1) Go to a layout that contains the fields you want to search for.
2) Enter Find mode by clicking the icon that looks like a magnifying glass in the left column of the database window. You can also press Ctrl-F or go to the View menu and select Find Mode.
3) The layout you are working on will give you a blank record. Enter any search criteria in as many of the fields as you want.

4) On the Request menu click Add New Request. You can also press Ctrl-N or click the New Request icon on the menu. You can add as many new requests as you need.
5) Click the Find button on the left column of the database window.

*Example:* To find all the students in zip codes 33176, 33156, and 33157 on the Contact layout, enter the first zip code in the Zip field, hit Ctrl-N, enter the second zip code, hit Ctrl-N again and enter the third zip code. Then click the Find button.

# Working With Student Records

Some fields in the student records save you time by allowing you to select from a list rather than typing in information. Selecting options from a list also allows the information in the database to be uniform and standardized. Instead of manually tying in a school or mentor name in the student's record you can select the appropriate name from a dropdown list. This also minimizes typing errors and variations in ways people record information. It is then easier to search for and find records with standardized spellings. This process also creates a link between the student record and the mentor record or the school record, etc.

The dropdown lists get their content from the database itself. As you add records like recruited mentors in the Mentors section, their names will appear in the dropdown list of mentors in the Student section. This same idea holds true for the schools and advocates dropdown list. If a name you are looking for does not appear in a dropdown list, you may need to add a record in the respective section.

## Adding a Student

1) Click the New Record icon or go to Records > New Record (Ctrl+N).
2) Enter any information in the fields.
3) Make sure the studentts county is correctly set in the County field.
4) Make sure the Status field is set to the student's correct status.

*Tip:* Fill in the Graduation field with the year you expect the student to graduate from high school. The database will automatically calculate the student's current grade. Over the summer, the database will automatically change the current grade for all of your students, so you don't' have to. If a student is retained, just change their graduation year.

## Assigning a mentor to a student

1) On the Active Students layout click on the Mentor (or CoMentor) field.
2) Scroll through the list of mentors and select the mentor you want to assign to the student.
3) Click on another record to save your changes.

*Tip:* You can also assign a mentor, school, or advocate to a student on the Student Detail layout in the same way as on the Active Student layout. Just click on any of those fields on the Student Detail page and you will see a dropdown list of names to select from.

## Recording a Student's School

1) On the Active Students layout click on the School field.
2) Scroll through the list of schools and select the school the student attends.
3) Click on another record to save your changes.

# Assigning Student Advocates

If your program has more than one student advocate, it may be useful to record the name of the student advocate assigned to each student in the students' record. Make sure the names of all of the student advocates in your program are recorded in the Advocates section first, so their names will appear in the advocate dropdown list.

## Assigning an Advocate to a Student

1) On the Active Students layout click on the Advocate field.
2) Scroll through the list of advocates and select the advocate assigned to that student.
3) Click on another record to save your changes.

# The Student Detail Screen

The Student Detail screen is largely self-explanatory ,though there are a few sections worth mentioning.

### Contact History

The Contact History box is used to record staff contact with the student. Whenever a Take Stock staff person calls, writes, or meets with a student, that contact can be noted in their record.

### Using Contact History

1) Enter the date of contact with the student in the Date field. You can use the calendar dropdown to select the date or manually type in a date.
2) Select the type of contact from the dropdown box in the Type of Contact field.
3) Enter any comments you would like to make in the Comment field (You can type several lines if you want).
4) Click on the Record Contact button.

The database will automatically enter your username into the contact record so you don't have to. Also, the contact you record will show up on the top of the list of contact notes.

## Group Notes

If you  have contacted several students for the same reason (e.g. met with a group, sent a letter to several students, etc.) , you can add the same contact note to the contact history of each of those students all at once.

### Creating a Group Note

1) If you have not already done so, perform a find to find all records for which you want to add the same contact note (e.g. all checked records from your county).
2) Enter the Type of Contact, any Comment you want, and the Date of contact at the top of the Contact History box to the left.
3) Click the Add Group Note button below.

***WARNING***

Clicking the Add Group Note button will add the same contact note to every record in the found set of records, so MAKE SURE THE FOUND SET CONSISTS OF ONLY THOSE RECORDS TO WHICH YOU WANT TO ADD A CONTACT NOTE. Check the number of Found records in the left column of this window to verify.

## College

The College section of the Student Detail layout provides information about the college a high school grad is attending and their scholarship information.  This section isn't just for high school graduates, though. Scholarship information will also appear in this section whenever a student is associated with a scholarship in the Scholarships section.

The **Prepaid Contract** # field and the **Hours Available** field are not editable from the Student Detail screen. The data in these fields are coming from the scholarship record in the Scholarships section. If you need to change the contract number or hours available on the contract, you can do that in the Scholarships section. You can click the Go button in the Scholarship section to take you directly to the Scholarships layout. All of the other fields in this section are editable.

To save you some time and to ensure consistency in the database, the **College** and **College Degree** fields have dropdown lists of colleges and degree types, respectively, so you can just select from the list.

## Photo

You can easily upload a photo of your students to their student record. Photos should ideally be sized to 125 pixels wide by 150 pixels tall. If your original picture is a little larger than 125 x 150, that is OK. The database will automatically fit the photo to the Photo box on the Student Detail layout.

Significantly larger pictures should be resized before uploading as they will take up unnecessary amounts of room in the database. Most image editing software will allow you to resize an image to a specified size. Some image editing software will allow you to process a group of pictures simultaneously, saving time resizing pictures one by one.

### Adding a Photo to a Student Record

1) On the Student Detail layout right click in the Photo box.
2) Click on Insert Picture...
3) Navigate to a folder containing the picture you want to upload by using the Look in: dropdown box at the top of the Insert Picture dialog box (Select "C$ on 'Client' (V:)". This is the C: drive on your local computer).
4) Select the photo file you want.
5) Click on the OK button.

## Mentor History

The Mentor History box is a list of Mentors the student has had. When a mentor no longer mentors a particular student, put their name in the Mentor History box before you assign a new mentor to the student.

## Transferring Students

You can transfer a student from your program to another program rather easily in the database. Once transferred, the student's record will no longer show up for you on the student layouts in the database. Instead, the program you transfer the record to will begin to see the record. Make sure you have completed working with the student's record before you transfer the student. You won't have access to the record after you transfer it.

Note that no matter how many time a student transfers programs, the student's record will always show their original county in the Original County field. Upon high school graduation, the program they graduate from will transfer the student back to the original program so that the original program can administer the college scholarship and track the student in college and beyond.

### Transferring a Student

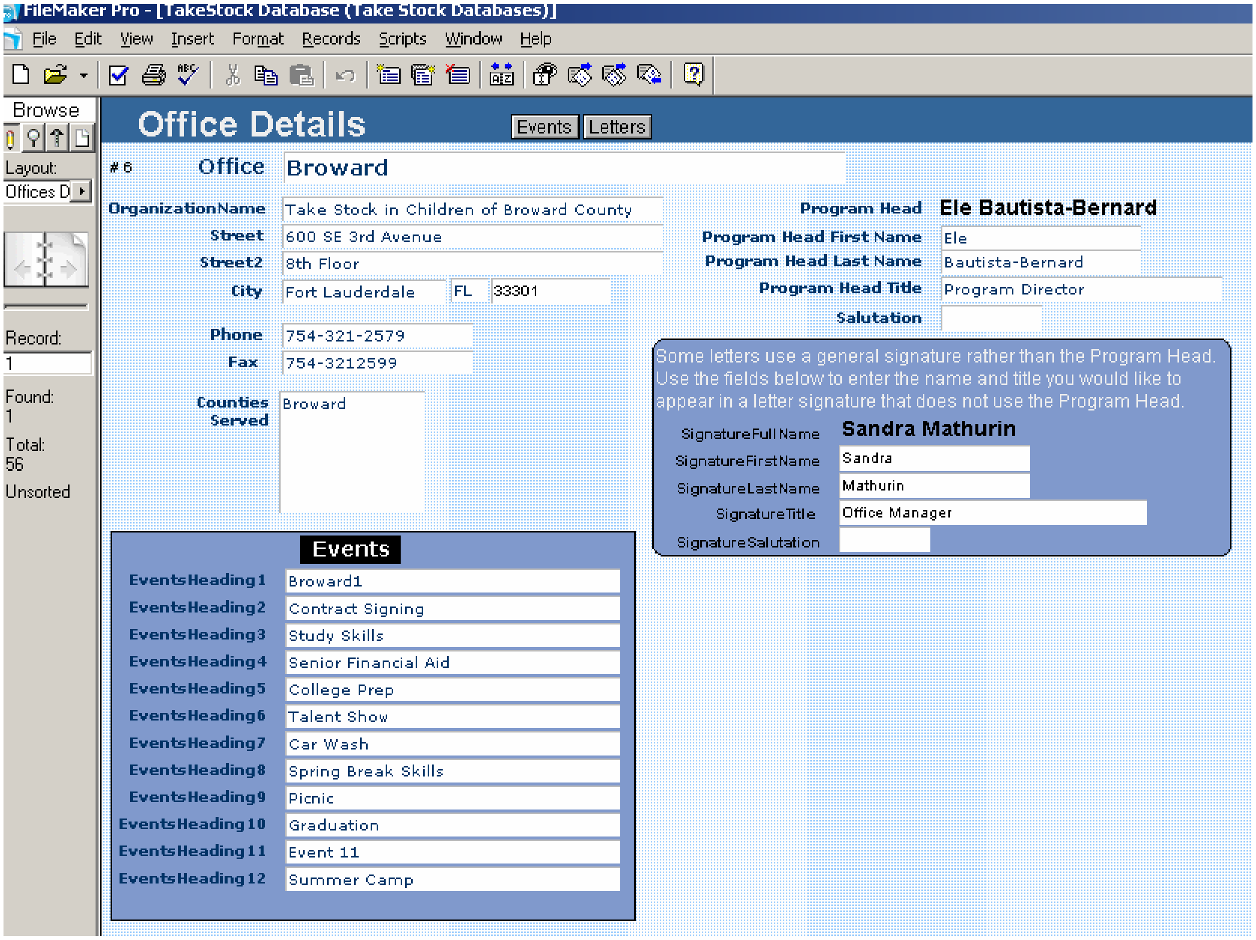
1) Go to the Student Detail layout of a student you would like to transfer out of your program to another program.
2) In the Transfer section (bottom right) click on the Transfer Ownership button.
3) Click on the Proposed New County field.
4) Select the new county the student is moving to from the dropdown list.
5) Click the arrow button.

## Working With Your Local Program Office Record

In addition to records of students and mentors, the database contains a record for every Take Stock office. These records contain your office's contact information and the events your office holds for your students throughout the year.

When you fill out your contact information it will appear in some of the letters in the Letters section. This allows you create letters tailored to your particular local program.

Many letters use merge fields that pull office and staff information from your Office Details page. Enter your office information on the Office Details layout and it will auto-




matically appear in some letters.

## Setting Office Details

1) Go to the Letters layout.
2) Click on the Your Office Details button at the top of the layout.
3) Enter your office information in the available fields.
4) Click on the Letters button at the top of the Office Details layout to return to the Letters layout.

Some letters in the Letters section are signed by the program head. The name and title appearing in the Program Head section of Your Office Details will appear in the signature area of these letters. Many letters, however, are not specifically signed by the program head. In these cases the letters pull information from the Signature section of your Office Details layout. You can enter anyone's name and title in this section, thereby allowing anyone to appear on the signature line of some letters.

The events listed in the Events section of the Office Details layout will show up on the Events layout where you can mark checkboxes for those students who attend the events.

### Setting Program Events

1) Click on the Events link under the Students menu.
2) Click on the Manage Events button at the top left of the Events layout.
3) Enter your events (up to 12) in the Events box on the Office Details layout.
4) Click on the Events button at the top of the Office Details layout to return to the Events layout.

## Printing

Printing labels and letters in the database relies on the concept of the **found set**. When you go to the Labels or the Letters section the database will print the labels and letters using the address information contained in the set of records that were most recently found. For instance, if you go from the Active Students screen to the Labels layout, the labels you print from there will only be for the active students in your program. If you want to send a mailing to all of your students on probation, you would first go to the Probation layout, which finds the probationary students in your program, and then go to the Labels layout. The found set of students on probation will then provide the address information appearing on the labels. You can also perform your own find to find a specific set of records you'd like to use to print labels or letters for.

*Exmple:* You can use the check box as a criterion to find records that don't have any particular commonality that would easily result from a find. Check off the students, mentors, etc. that you want to be in your found set. perform a find for all records in your local program (include your county) that contain a check mark in the check box. Then go to the Labels section or Letters section and you can print labels or letters for that found set of check-marked records.

### Printing Labels

1) Find the set of records you would like to print labels for (e.g. Active students, recruited mentors in a certain zip code, high schools, etc.).
2) Click on the Labels link on the database menu.
3) Select the type of label you would like to print.
4) Click on the Preview icon to see what the sheet of labels will look like.
5) Click the Print icon or go to File> Print… (Ctrl-P) to print your labels.

Printing letters is a similar process to printing labels. Find the records of students or mentors, etc. that you want to send a letter to. Then any letter you select in the Letters layout will contain information pertinent to that set of found records.

### Printing Letters

1) Find the set of records you would like to print letters for (e.g. Active students, recruited mentors in a certain zip code, high schools, etc.).
2) Click on the Letters link on the database menu.
3) Select the type of letter you would like to print.
4) Click on the Preview icon to see what the letters will look like.
5) Click the Print icon or go to File > Print... (Ctrl-P) to print your letters.

## Working with Scholarships

Scholarships are treated as their own unique records in the database. Rather than entering a scholarship number in a student record, the database creates a record for each scholarship and then the scholarship record is linked to a student record. That way, if a student leaves the program, the scholarship record will remain intact and can be linked to a new student.

### Adding a Scholarship

1) Click the New Record icon or go to Records > New Record (Ctrl+N)
2) Enter the contract number in the Contract# field.
3) In the College Student field, use the dropdown list of names to select the name of the student assigned to that scholarship. You can leave the field blank if the scholarship has not yet been assigned.
4) Enter any additional information in the remaining fields.
5) Make sure your county is correctly set in the Scholarship County field.

## Working with Mentors

Working with mentor records is very similar to working with student records. However, there is one important difference in that you cannot add a student to a mentor record like you can add a mentor to a student record. All student-mentor matching is done in the student records.

Like with the student records, there are two basic views, a spreadsheet type view of several records at once, and the Detail layout which shows one record at a time. The detail layout is probably the easiest to use when adding a new record or making changes to a mentor's information.

### Adding a Mentor

1) Click the New Record icon or go to Records > New Record (Ctrl+N).
2) Enter any information in the fields.
3) Make sure the mentor's county is correctly set in the County field.
4) Make sure the Recruit Status field is set to the mentor's correct status.

## Mentoring Session Log

The mentoring session log is used to keep track of mentoring sessions. In its simplest use, you can enter the number of minutes of a session and click a button. It will automatically record today's date and the initials of the user.  This will be a simple way of quantifying our mentoring efforts.

### Recording a Mentoring Session

1) In the Mentoring Session Log enter the duration (in minutes) of the mentoring session in the Session Duration field.
2) Enter any comments in the Comment session (the field can hold a lot more text than it might appear).
3) Click the Record Session button.

## Potential Mentors

The Potential Mentors shows a  set of records that have a recruit status of something other than Recruited. This section can be a useful place to manage your potential mentors and monitor their progress from initial inquiry to training completion. On this layout you can track the various steps associated with preparing a volunteer to become a mentor.