Milestone: Database and Family Portal Configuration*

FACTS SIS Home Page
- Review page sections: including Support Toll-Free Number, Chat Support, and Updates
- FACTS SIS HubHelp
- User Voice
- Review Name of School, School Year, and Term, and how to make changes

Break for Q&A on Home Page

System>Configuration
- School Configuration
- Year and Term (start/end of each term of school year)
- Day Setup (all "no school" days where attendance is not taken)
- Year and Term Report
- System Defaults
- Grade Levels
- Attendance
- Locker Management (if applicable)

Break for Q&A on System Configuration

FACTS Family Portal>Configuration
- Default Configurations
- Show/Hide Features
- Announcements & Calendar Events
- Web Forms

Break for Q&A on Family Portal Configuration

Wrap Up and What's Next?

* Content covered in training varies in relation to the data provided by the client. Topics not relevant to any client's specific database will be omitted.

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Milestone:
Students, Parents, and Staff*

People>Students Dashboard, including

- Using Student Filter, Status, Sub-status, and District-Wide (if applicable)
- Add New Student (sample)
- Student Contact & Demographics
- School Information
- Medical
- Emergency Contacts & Picks Ups
- Religion (if applicable)

Break for Q&A on Student Dashboard

People>Family Dashboard, including

- Individual Contacts & Demographics
- Relationships
- Employment information
- Unique Households (sample)

Break for Q&A on Family Dashboard

People>Staff Dashboard, including

- Staff Contact
- Human Resources
- School Information
- Emergency Contacts
- Education (if applicable)
- Religion (if applicable)
- Add New Staff (sample)

Break for Q&A on Staff Dashboard

Wrap Up and What's Next?

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Milestone: Course Level, Courses, and Transcripts*

System>Configuration

- Course Level
- Gradebook Setup
- Report Card Setup

Academics>Courses, including

- Course Configuration
- Report Card Weighting (basics)
- Existing Transcript Loading Configuration
- Skill Sets

Class Rank and Honor Roll

- Configuration of Standard Honor Roll
- Running Honor Roll

People>Students>Transcripts (if applicable for HS)

- Transcripts Converted or General Navigation
- Create Sample Manual Transcript Entry

Break for Q&A on Student Transcripts

People>Students>Academics:

- Standardized Test Scores Converted or General Navigation
- Create Sample Test with Scores

Break for Q&A on Test Scores

Wrap Up and What's Next?

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Milestone:
Scheduling Basics and
Class Configuration

Scheduling

- Template Creation
- Copying Template
- Patterns (if applicable)

Academics>Classes

- Class Section Creation
- Enrolling Students
- Class Roster
- Class Schedule (basics)
- Edit Course Shortcut

Scheduling

- Group Enrollment

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Milestone:
Security Configuration*

Settings
- Password Minimum Length
- Password Expiration (days)
- Allow Login Attempts

Login Management
- Users Box (selecting people)
- Changing Username/Password

Groups
- Group Breakdown
- Adding/Moving People
- Adding/Moving Rights
- Edit/Delete Groups

Staff Screen Security Groups
- Login Management
- Select Security Group
- Staff Security Rights

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