

# *A*chademix

Student Data Management

# *A*chademix

## Navigation & Overview

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CODELEVEL SERVICES LLC

# Agenda

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This session focuses on understanding the Achademix layout and terminology. You will learn how to log in, search for records, post to the bulletin board, and message other users.

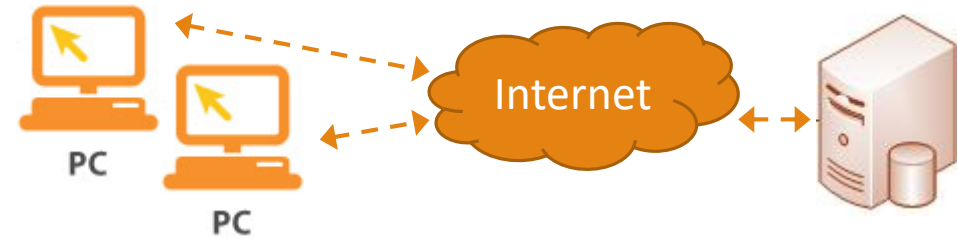
1. Logging In for the 1<sup>st</sup> Time
2. General Navigation & Terminology
3. Searching for Records
4. Using the Bulletin Board
5. Using the System Messenger

# Login

When using the Achademix Administration Client you are logging into a Microsoft Windows .NET application whose data and business logic is hosted on a remote web server.

The use of **Microsoft Internet Explorer**  is required to start the application.\*

At startup, a proper connection to the database is verified, which may take a moment or two. Once complete, the login form will appear.



\* The Google Chrome browser may be used with the "IETab" plugin, which can be obtained via the Chrome Web Store.

**Administration Client Address:** MVCTC.Achademix.info

**Web Service Address:** http://75.98.233.150/AxMVC8842WS/AchademixWS.asmx

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CodeLevel Services  
Achademix

Name: Achademix  
Version: 1.0.165.1  
Publisher: CodeLevel Services

The following prerequisites are required:

- Windows Installer 3.1
- .NET Framework 3.5

If these components are already installed, click the button below to install the prerequisites.

Run

Click on the "Run" button

Achademix  
Please Login

User name  
larys

Password

[Forgot your password?](#)

Cancel OK

Enter Username and Password then click "Ok"

Application Run - Security Warning

Publisher cannot be verified.  
Are you sure you want to run this application?

Name:  
Achademix

From (Hover over the string below to see the full domain):  
67.214.100.82

Publisher:  
Unknown Publisher

Run Don't Run

While applications from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not run this software. [More Information...](#)

You may get this dialog. If so, just click on the "Run" button

**Notice:** With your **first login from a PC that has never run Achademix** you will be asked to enter the Web Service Address (show above) before you get the login form. This will only happen once, though note that after entry, please wait for it to register and connect. **THIS MAKE TAKE A MINUTE, so do not select the OK again.**

Click Here to Log out

# My Page

After login this is first place all users will land. **It is generally a good idea to return here before logging out to check for any notifications.**

These messages, including tasks and alerts, are listed in the Notification pane.

The Bulletin Board is for Global communications, thus are made available to all users. They can also be set to appear on the public student portal web site.

The Calendar displays events from the school's master calendar, as well as any events entered by the user. These personal entries are NOT visible to anyone else.

The screenshot shows a web application interface for 'Scott County Career Technical Center'. The top navigation bar includes 'Options', 'Settings', and 'Management'. The main content area is divided into several sections:

- My Page:** Features a profile picture of Brian Hall (Address Unknown) and a callout bubble that says "Your favorite pic."
- Notifications:** A list of alerts with 29 items, including messages about missed hours for various staff members. A callout bubble points to this section with the text "Alerts and Task Notifications".
- Bulletin Board:** A section for global communications.
- Daily Activities for 12/5/2016:** A list of scheduled activities such as "Practical Nursing [PN16F / PN16F] (R:TBD F:TBD C:TBD)". A callout bubble points to this section with the text "Daily Schedule".
- School Calendar:** A monthly calendar for December 2016 showing events like "Info Mtg", "OCILB", "PLM16F - End Term", "ITP - Christmas Break", and "School Closed - Chri". A callout bubble points to this section with the text "School Calendar Events".
- Navigation to Modules:** A vertical sidebar on the left contains icons and labels for "My Page", "Students", "Pathways", "Classes", "Industry", "Funds", "Services", "Programs", "Staff", "Courses", "Facilities", "Assets", and "My School". A callout bubble points to this sidebar with the text "Navigation to Modules".

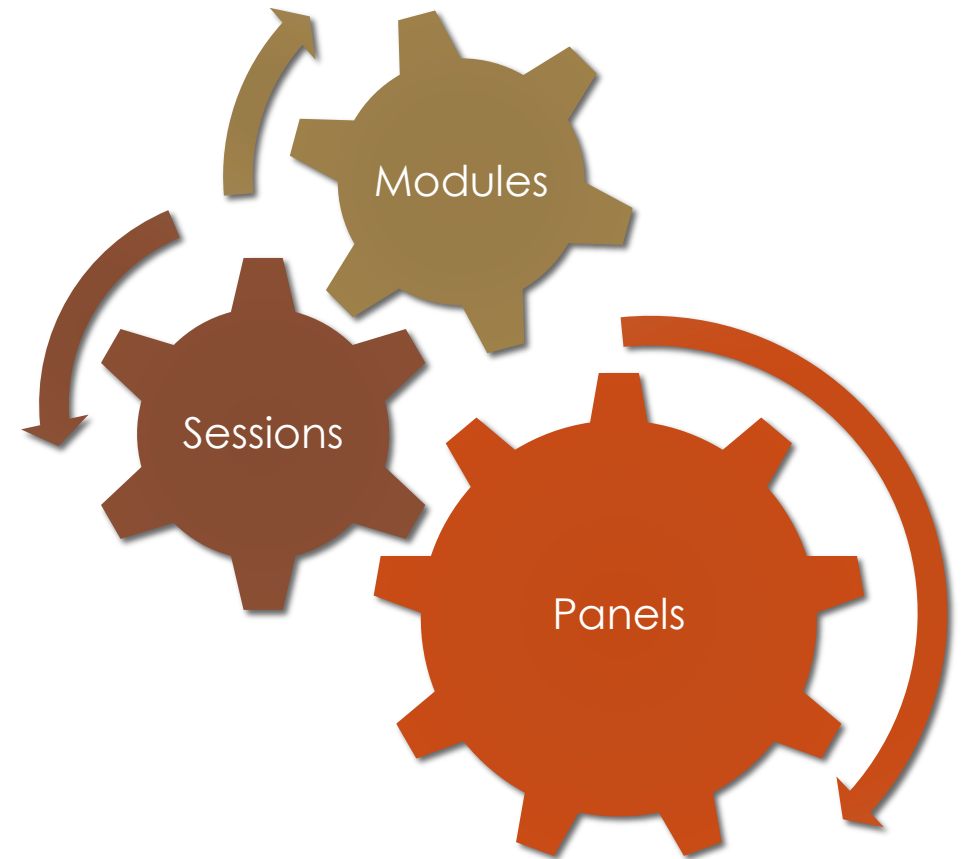
The bottom right corner of the interface shows the user is logged in as "Brian Hall (Main)" on "12/8/2016".

# Navigation and Terminology

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It is important to familiarize each user with the basic operations of Achademix, as well as to understand the terminology each person will encounter in discussions, support calls/emails, and in further documentation.

Once a good understanding of these concepts and terminology is in place, it will be much easier to learn the operational details of each area of the system.



# Modules (Navigation Panel)



The Navigation Panel is located on the far left of the application and is available no matter where you are within the system.

While there are a number of Modules included in the system, each Module is controlled by security access rights, therefore each user will only see those Modules that are part of the security group.

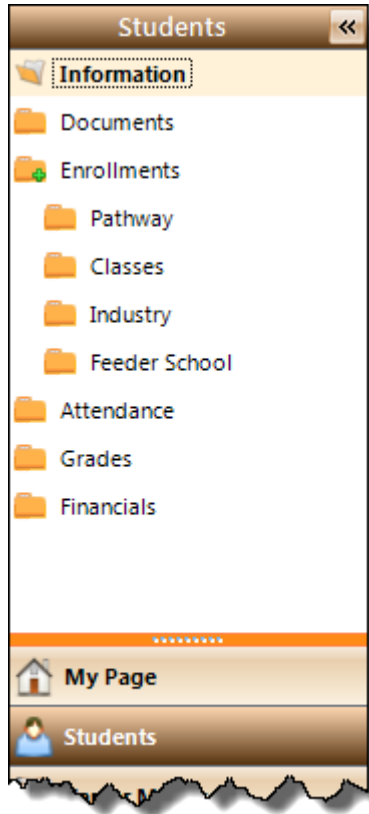
As the panel collapses the icons will minimize into the tray at the bottom of the list. The Module can also be selected by clicking on the icon when in this minimized state. The user can increase the number of Modules in the list by dragging up the orange separator bar above the "My Page" option.

Tray Icons





# Sessions



Each Module is comprised of one or more Sessions.

When a Module is selected, the user will be able to control its applicable Sessions at the top of the Navigation Panel. An example of the Student Module Sessions are shown here to the left.

The current selected Session will display an “open” folder icon next to the Session name, as well the Session title will be highlighted with bold text.

The Information Session is the default Session for each Module. It will be automatically opened when the Module is **first** selected.

However, note that if a user returns to a Module they have previously opened, they will be placed on the Session where they left off, as long as they return within the same login period. This allows the user to move freely between Modules and Sessions when multi-tasking.

# Session Layout (Panels)

The majority of Sessions are laid out in a similar fashion.

Each session will typically contain the following four panels.

## 1. Control Panel or Ribbon

Functions, Filters & Search Controls

## 2. List Panel

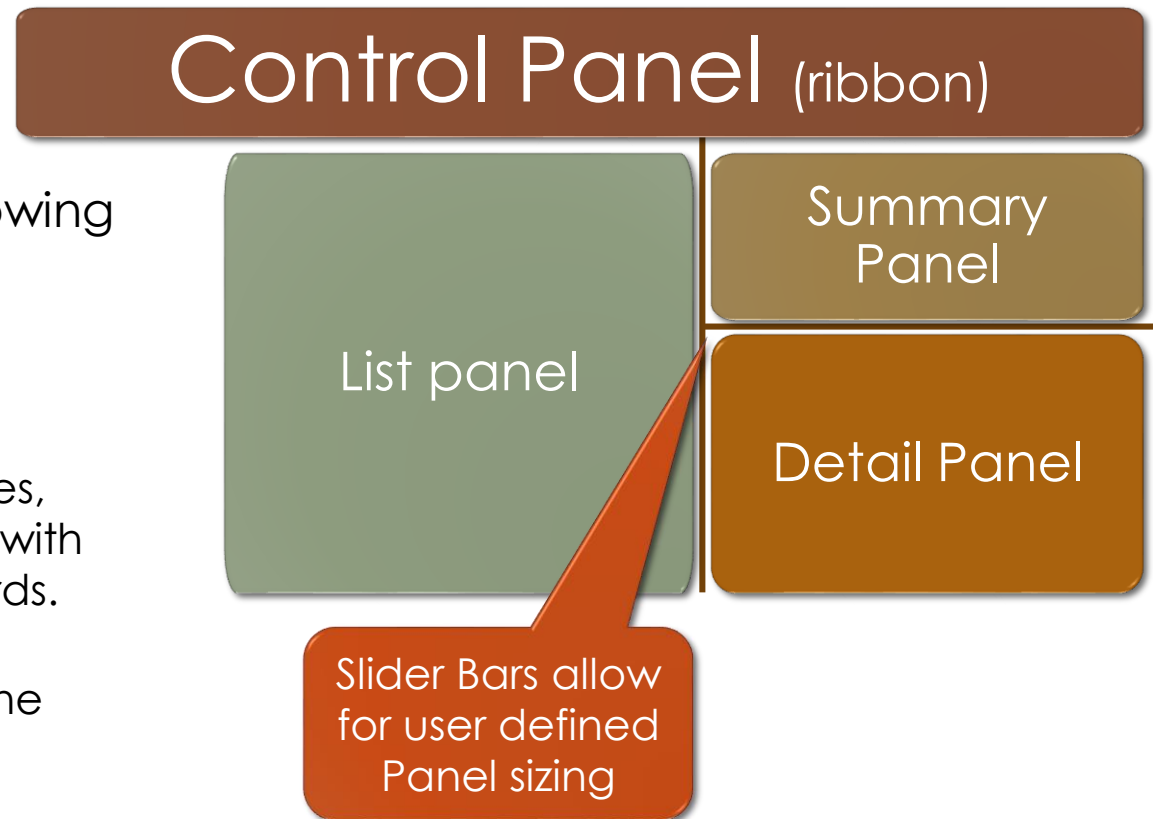
List of the Modules records (student, courses, funds, etc.) This list allows the user to work with unlimited groupings of these Module records.

## 3. Summary Panel

Commonly requested information about the selected record.

## 4. Detail or Edit Panel

Where data is added and modified.

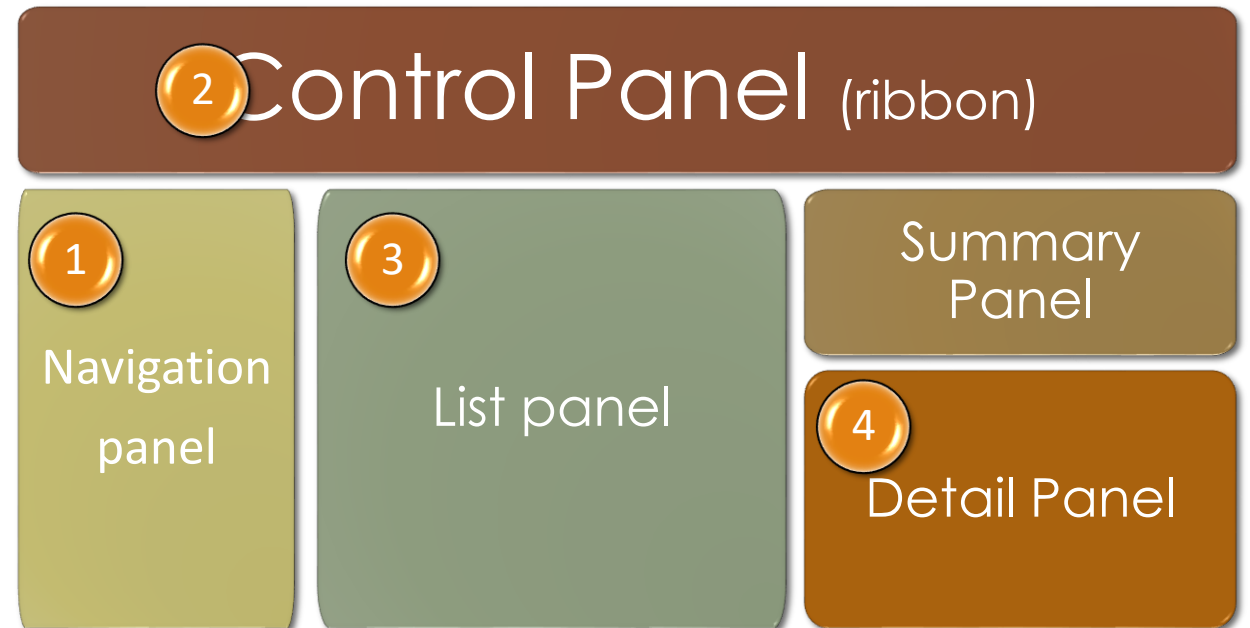


# Process

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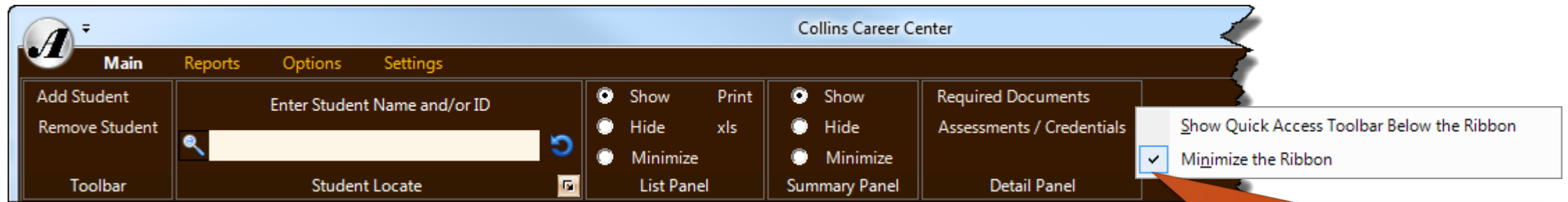
Your typical operation will involve the following 4 steps

1. Select the Module & Session  
Students > Information *(default)*
2. Locate the desired Module record  
Enter a search using a student name
3. Select the record from the list  
Choose the desired student
4. Modify the record's data  
Add a new phone number



# Control Panel (Overview)

The Control Panel is most commonly referred to as the “**Ribbon**”.



Most control options are available in some area of the Ribbon.

### 3 Primary Uses:

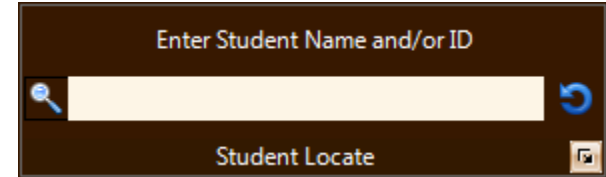
- 1) Adding records
- 2) Locate / Search controls
- 3) Reports

**Notice:** Though some controls found on the Ribbon are common for most Modules, some controls are specifically related to the selected Module and Session.

Collapse the Ribbon, revealing only the menu titles by right-clicking anywhere on the Ribbon and checking the option

# Locating Records (i.e. Searching)

One of the most useful and highly productive controls found on the Ribbon is the Locate/Search control.



There are four different ways to use this control.

## ➤ **Basic Search**

In most Modules this is a direct search for previously entered data. For example, while in the Student Module, the basic search will use whatever is entered in the search field and look for a match against student first names, last names, maiden names, preferred names, or student IDs. Though a student's complete name can be entered, entering just a few characters of the first and last name will typically locate the desired student.

## ➤ **Advanced Search**

Use the "Expand" option in the lower right corner of the search control to open the Advanced Search dialog. This will allow the user to search using additional data elements than are available via the Basic Search.

## ➤ **Directive Search**

A Directive Search, sometimes referred to as a "hash tag" search, is used to locate a group of students that all have an alike characteristic, such as all being in the same Pathway or all having been absent today, etc. This is the #1 feature in Achademix that reduces the need for special internal reports. All Directive Searches will start with the "#" character. [*#Absent – lists all students absent today*]

## ➤ **Last Search**

This search executes your last search. This is also used to refresh the list with the most current data in the database.

# Try some searches...

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Give it a go!

**Go to:** Students > Information

**Go to:** Students > Information

**Go to:** Students > Information

**Enter search:** Mi Mo

**Enter search:** #PATH ATP

**Enter search:** #INDUSTRY AOG

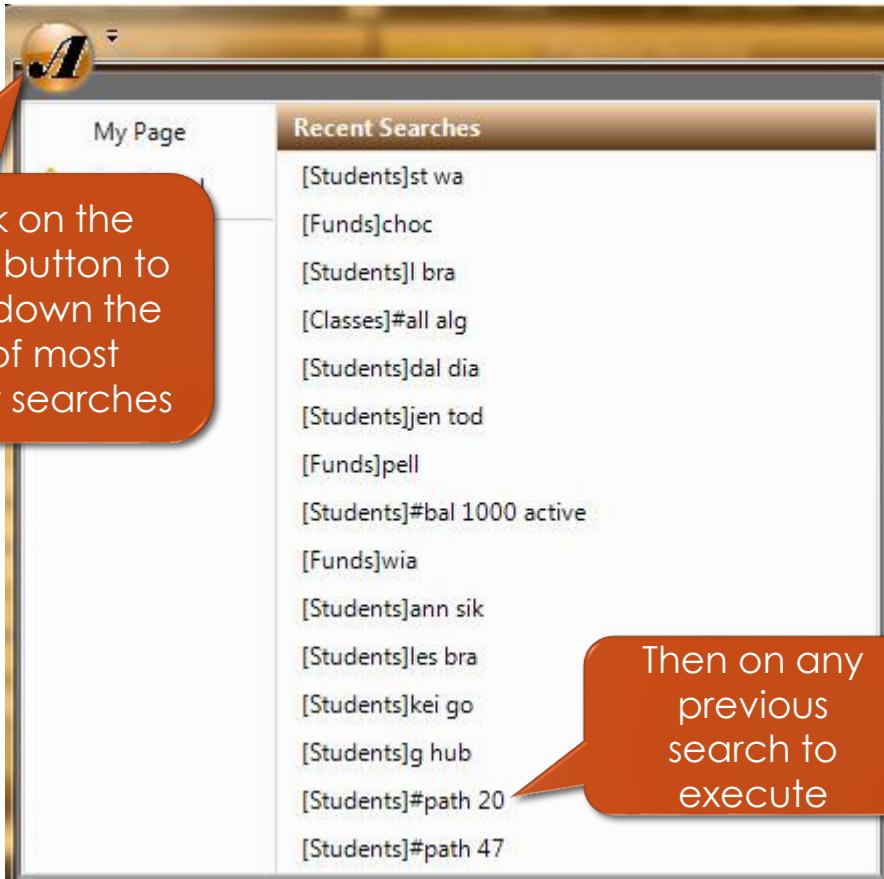
# Locating Records (Continued)

## Recent Searches

The Recent Searches list allows the user to access a list of the most recent searches they conducted.

The user can quickly review where they've been or get back to a record they were working with before an interruption. This is an especially useful feature for Directive Searches that require the user to remember a specific search command.

Note the example of Directive Searches to the right...



The screenshot shows a software interface with a 'My Page' tab and a 'Recent Searches' list. The list contains the following search commands:

- [Students]st wa
- [Funds]choc
- [Students]l bra
- [Classes]#all alg
- [Students]dal dia
- [Students]jen tod
- [Funds]pell
- [Students]#bal 1000 active
- [Funds]wia
- [Students]ann sik
- [Students]les bra
- [Students]kei go
- [Students]g hub
- [Students]#path 20
- [Students]#path 47

Two callout boxes provide instructions:

- An orange callout box points to the Home button (a small house icon) and says: "Click on the Home button to drop down the list of most recent searches".
- A smaller orange callout box points to the search command "[Students]#path 20" and says: "Then on any previous search to execute".


# List Panel

The result of a user's search will always appear in the List Panel.

This list allows the user to see, and work with, a number of a Module's records at one time and in one place.

The check boxes next to each item allow for group functionality in special operations or reports.

Note that the result of the search will remain in this list regardless of the Session selected, allowing the user the flexibility to work with different data within a Module without having to continually enter new search criteria.



	Name	ID #	Status	Level
<input type="checkbox"/>	Mckenzie Ashcraft	00002220AD	Active	Adult
<input type="checkbox"/>	Amy Barrett	00002228AD	Active	Adult
<input type="checkbox"/>	Kristen Bird	00012220AD	Active	Adult
<input type="checkbox"/>	Danielle Clarke	00002273AD	Active	Adult
<input type="checkbox"/>	Latisha Cornelson	00002139AD	Active	Adult
<input type="checkbox"/>	Cheyenne Eschenbauch	00002234AD	Active	Adult
<input type="checkbox"/>	Adrienne Farmer	00002235AD	Active	Adult
<input type="checkbox"/>	Keisha Goodson	00002236AD	Active	Adult
<input type="checkbox"/>	Chelsea Griffith	00002237AD	Active	Adult
<input type="checkbox"/>	Shelby Heck	00002238AD	Active	Adult
<input type="checkbox"/>	Jennifer Hill	00002239AD	Active	Adult
<input type="checkbox"/>	Chelsi Jett	00002240AD	Active	Adult
<input type="checkbox"/>	Jonathan Kimmel	00002241AD	Active	Adult
<input type="checkbox"/>	Miciah Lynch	00002242AD	Active	Adult
<input type="checkbox"/>	Sherea Martin	00002244AD	Active	Adult

Select All



# Detail Panel

The Detail Panel is the “working” panel, as it is here that a user will enter and edit information related to the selected record in the List Panel.

The Detail Panel will provide the relevant data fields according to the current Module and Session.

The Detail Panel may contain many fields that dynamically move to fill the space available or they may be a “fixed” control, depending on the Session.

In the example to the right, displayed is the Student (module) Information (session). With enough screen resolution and an adjustment of the splitter bars, the user could see all the fields on the screen with no need to scroll.

First Name	Mickey	Last Name	Mouse
Middle Name		Maiden Name	
Name Suffix		Preferred Name	Mickey Mouse
Status:	Prospect	ID (or STN)	00001000AD
Date of Birth	03/05/1958	Calculated Age:	56
DOB Verification	Verbal	Is Senior	<input type="checkbox"/>
Gender	Male	Advisor	
SSN	442-35-7432	SSN Verification	Verbal

Contacts (2) Add Edit

Mobile Phone: (918) 756-9341 Active/Primary/Notify/Text  
Email: Mick@CodeLevel.com Active/Primary/Notify/Publish

Address (1) Add Delete View

Title: Address: 1234 N. 5th Place Type: (Not Selected)  Active Primary

Save Cancel

The Save button will light up when there are changes to be saved

# Summary Panel

The Summary Panel is provided for the majority of Modules to provide the user with quick access to common, or the most desired, information.

The example to the right shows a typical Student (top) & Pathway (bottom) Summary Panel.

**Info: Amanda Allen** Active



**00001093AD**  
Phone: (740) 358-9708  
Email: rsa@yahoo.com  
6811 Johnstown Road  
Springfield, OH 45502

**Emergency Contact: (740) 398-5071**

Pathway: Practical Nursing  
Schedule: PNI9.14-15 Hrs Attended: 0  
36% Ahead of Schedule

Feeder School: N/A  
Industry: N/A  
Account Balance: \$20,693.00

114

**Info: Cosmetology** Open

Instructor: Sarah White 3

Status
<input checked="" type="checkbox"/> Pending [3]
<input checked="" type="checkbox"/> Waiting
<input checked="" type="checkbox"/> Approved
<input checked="" type="checkbox"/> Active [4]
<input checked="" type="checkbox"/> Completed
<input checked="" type="checkbox"/> Dropped
<input type="checkbox"/> Canceled

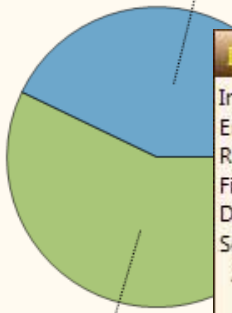
Include Students with the checked Enrollment Status

Schedules

Financials

Submit Changes

Chart Mode:



**Info: Medical Insurance Billing** Open

Instructor: Valerie Imblum 42

Enrollments: 7 Current Enrollments; (7) Active,  
Required Hours: 900 vs 13 Courses totalling 900 Hours.  
Fixed Scheduling  
Dates Tuesday, September 03, 2013 - Thursday, June 12, 2014, Days -MTWTF-  
Schedule: MIB 13-14 has 182 Days for 900.00 Hours  
Attendance was last recorded on 3/6/2014

# My School

The My School Module allows users to locate information system-wide.

For example, under the Financials Session, the user can look at all accounts that meet some condition, regardless if it is a student, fund, or industry account.

The screenshot displays the 'CodeLevel Career Center' application. The main window is titled 'CodeLevel Career Center' and features a navigation menu on the left with options like 'Main', 'Reports', 'Options', and 'Settings'. A search bar at the top left contains the text '#BAL 100'. Below the search bar, there are several action buttons: 'Show', 'Print', 'Hide', 'Minimize', 'List Panel', 'Summary Panel', 'Take Payment', 'Invoice Manager', 'Create Charge', 'Refund Manager', 'Allocation Manager', and 'Drawdown Manager'. The main content area is divided into three sections: 'My School' (left sidebar), 'Account List (185)' (center table), and 'Info: Laurel Trumble' (right panel).

The 'Account List (185)' table shows the following data:

Name	Status	Balance
Laurel Trumble	Active Account	\$1,339.00
Service and Manufacturing	Active Account	\$200.00
Deborah Leeson	Active Account	\$289.00
Catherine Maxwell	Active Account	\$772.50
Nicholas Purvis	Active Account	\$831.51
Zachary Freisberg	Active Account	\$625.57
Taquilla Brown	Active Account	\$610.93
Mattie Green	Active Account	\$1,303.00
Hattie Frye	Active Account	\$943.75
Brandon Buoy	Active Account	\$146.66
Trishanna Gordon	Active Account	\$142.50
Haley Moran	Active Account	\$152.67
Brandi Yankovich	Active Account	\$398.04
Phillip Standridge	Active Account	\$1,775.78
Heather Debroeck	Active Account	\$1,125.00
Angela Conover	Active Account	\$300.00
Dafne Brewer	Active Account	\$2,995.65
Brianna Mathes	Active Account	\$252.97
Jaden Richardson	Active Account	\$772.50
Shelby Ennis	Active Account	\$1,078.35
Tessa Clay	Active Account	\$1,359.01
Autumn Stewart	Active Account	\$176.67
Corey Abel	Active Account	\$900.00
Breanna Anders	Active Account	\$4,500.00

The 'Info: Laurel Trumble' panel includes a pie chart showing the distribution of charges and payments:

- Charges: 58.54% (\$4588)
- Payments: 41.46% (\$3249)

Additional contact information for Laurel Trumble is provided:

- Mobile: (555) 766-2702
- Email: laurelT1222@zmail.com
- Emer. Mobile: (555) 766-2701 (Amy Trumble)
- Emer. Mobile: (555) 766-2007 (Ron Trumble)
- Address: 1243 May Lane, Pensacola, FL 32006

Below the pie chart, there is a table of payments:

Date	Description	Amount	Receipt #	Type	Allocate	Card
12/05/2014	Paid by Check	334.75	T1105	Check	✓	
11/10/2014	Paid by Check	334.75	T1000	Check	✓	
09/24/2014	Paid by Check	334.75	T763	Check	✓	
09/18/2014	Paid by Check	334.75	T727	Check	✓	
07/23/2014	Paid by Check	334.75	T285	Check	✓	
06/25/2014	Paid by Check	1,575.00	TC138	Check	✓	

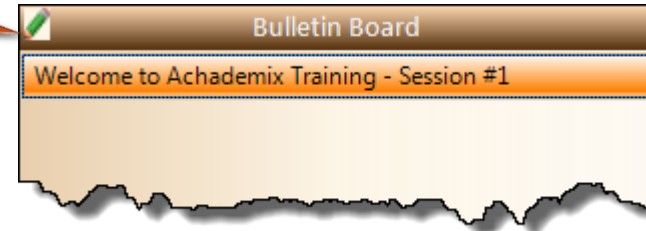
The bottom of the interface shows a 'Total Balance: \$317,907.07' and a 'Filter' button. The status bar at the bottom right indicates 'Logged in: Brian Hall (MAIN) 3/25/2015'.

# Posting to the Bulletin Board

## BASICS

1. From My Page, select the edit icon in the header of the Bulletin Board pane, if available
2. Enter in the desired data to share with all users, and the student public portal
3. Choose Send to post

Choose the Edit option to create a post



Enter the number of days that this message should appear on the bulletin board

Enter the title for the post. Note that this is the text that will appear on the bulletin board

A screenshot of the 'Post Bulletin' dialog box. The dialog has a title bar with a blue background and a close button (X). The main area contains several fields: 'Method:' with a dropdown menu set to 'Bulletin Board'; 'Remove after:' with a dropdown menu set to '2' and the text 'days' next to it; 'Importance:' with a dropdown menu set to 'Normal'; 'To:' with the text 'System Bulletin Board'; 'Subject:' with a text box containing 'Welcome to Achademix Training - Session #1'; and 'Message:' with a large text area containing the following text: 'Achademix Training Session #01: System Administrator Activities & Base Data Review', a horizontal line, and 'This first session focuses on management activities within the system. We will teach the applicable users how to manage user profiles and reset passwords, use the bulletin board, set up receipt/invoice groups, and more. Other activities associated with this session are focused on setting up supporting data for the subsequent sessions, such as pick list options and policy requirements. The basic agenda for the meeting is as follows: 1. Logging In for the 1st Time 2. General Navigation & Terminology 3. Entering Staff & Managing User Profiles'. At the bottom right of the dialog are 'Send' and 'Cancel' buttons.

Enter descriptive information that a user can access if they click on the posted message – this will not be available on the portal

Choose "Send" to post

# Using the System Messenger

## BASICS

1. From My Page, select Options > System Messenger from the Ribbon
2. Enter the method, type and importance of the message
3. Select the user or users that should receive the notification
4. Create the message (a spell checker will display if any words are misspelled)
5. Choose Send

The image illustrates the process of using the System Messenger through several screenshots and callouts:

- Choose System Messenger in the Ribbon:** A screenshot of the 'Options' ribbon menu with 'System Messenger' selected.
- Set the method for how you would like the recipient(s) to receive this message:** A screenshot of the 'System Messenger' dialog box showing 'Method: Alert/Task', 'Type: Alert', and 'Importance: Normal'.
- Choose the recipient(s):** A screenshot of the 'System Messenger' dialog box showing the 'To:' field set to 'Selected Staff Members' and a dropdown menu with 'Brian Hall' selected.
- The message appears on the recipient's My Page:** A screenshot of an 'Alerts' notification list showing a message: 'Ensure Student (Mickey Mouse) is properly enrolled.'
- Message Content:** A screenshot of the message content: 'Brian, Please ensure that you have correctly enrolled Mickey Mouse, as he is applying for two different programs but only the MA program will be funded using Title IV. Thanks, Jamie Issued: Monday, August 11, 2014 at: 3:56 PM'.

# General System Information

## So did you learn anything?

Can you run the Achademix Administration Client from your iPad?

**No**

How can you receive system notifications?

**My Page > Notification Panel or Email**

It is a good idea to always do \_\_\_\_ before logging out?

**Return to the "My Page" Module and check Notifications**

Name the 5 primary panels used throughout Achademix?

**Navigation, Control, List, Summary, Detail**

How would you locate a specific student?

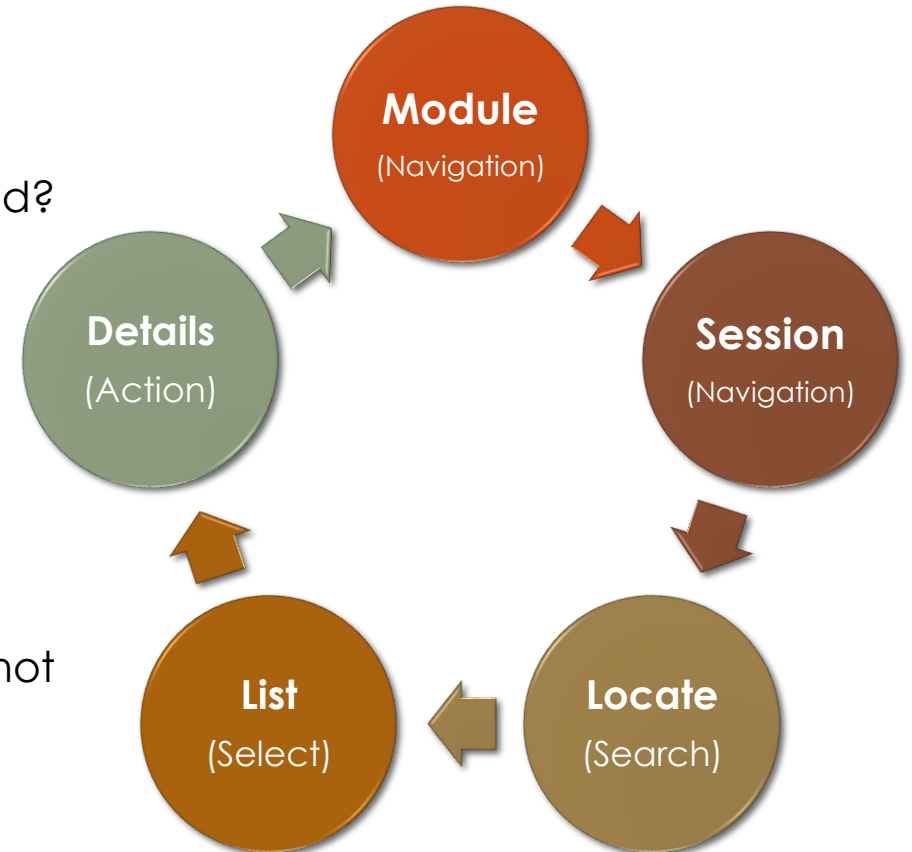
**Use a Basic Search entering First & Last Name information**

What search "type" would you use to find all students that are not making satisfactory progress who are currently awaiting a disbursement from financial aid?

**A Directive Search (ex. #SHAMED)**

What is the primary purpose of the List Panel?

**To work with a group of students that all have a similar characteristic**



# This concludes your training exercise.

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## Achademix: Navigation & Overview

This material presented here is brief look at the basic concepts of control and navigation throughout the Achademix Administration Interface, as well as an understanding of basic configuration options.

Make sure you know how to get around within Achademix and let us know if you have any questions.

All processes shown and presented are subject to change without notice.

## Reference Documents

OSB7 Student Search Directives

OSB8 Class/Pathway Search Directives

[www.Achademix.net](http://www.Achademix.net)

