iRU Course Descriptions

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**Level
2**
Intermediate

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Advanced Letters

This course explores the creation of more sophisticated merged letters using letterboxes and textcalcs. This includes learning when it is appropriate to merge data and when it is not. We will explore solutions to more difficult merge challenges and examine ways to consolidate all the various letters your office produces without compromising quality.

Prerequisites: Forms to Letters or equivalent experience.

1   *Create letters with placed fields—check boxes, between text boxes, etc.*
2   *Learn to work with the different name forms for children and parents.*
3   *Understand how to create and use letterboxes.*
4   *Understand how to create textcalcs in letter merge layouts to increase productivity.*
5   *Understand merge challenges like multiple pages, date and number formatting, sibling information.*

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**Level
2**
Intermediate

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Automating FMP

This is an intermediate level course that explores the various ways to automate reporting and other jobs in *FileMaker Pro* using scripts. Learn to create various scripts that perform a variety of automated tasks and create buttons to operate scripts. You'll also learn some basic troubleshooting techniques as well.

Prerequisites: Layout Tips & Tricks and one other Customizing session.

1   *Build a basic reporting script that includes a find, a sort, a layout selection, and preview step.*
2   *Create modular scripts.*
3   *Learn basic scripting commands in **ScriptMaker**, FileMaker Pro's scripting environment.*
4   *Learn to troubleshoot your scripts.*
5   *Understand the benefits of modular scripting.*

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**Level
1**
Beginner

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BROADCASTER

BROADCASTER is a brand new product that allows you to send individualized emails with merged content to students, families or constituents. Additionally, you can track who has opened your email and who has clicked on any embedded links. This is a hands-on class that will demonstrate not only how to send broadcast email but also how to manage content and templates.

Prerequisites: KEYSTONE, PORTAL or GENERATIONS Topics I

1   *Learn how to create new templates.*
2   *Learn how to manage image assets.*
3   *Learn to schedule and monitor broadcasts.*
4   *Learn to send a broadcast email with merged data, images and links.*
5   *Understand the FM Server side script and plug-ins necessary for BC to run.*

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**Level
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Beginner

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Building Lists

This course explores the fundamentals of creating lists in *FileMaker Pro*. You will learn how to quickly create simple lists, manipulate them and attach them with buttons to Organization Screens to keep your solution organized. This is a fundamental course and is a prerequisite for **Intro to Reporting.**

Prerequisites: Layout Tips & Tricks or equivalent experience.

1   *Learn the Open concept "Add, don't change."*
2   *Learn to connect new lists to Organization screens.*
3   *Learn to duplicate and then change an existing list. (DRAE)*
4   *Learn to troubleshoot lists.*
5   *Practice layout adjustments for graphics and spacing.*
6   *Practice manipulating and aligning list objects.*

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7   *Understand how a simple list, combined with a find, creates versatile reporting.*

8   *Understand List view vs. Form view vs. Table view.*

9   *Understand the basic layout parts: header, body, footer.*

10 *Understand the concept of Organization or Org screens in iR solutions.*

11 *Use the Wizard to create simple lists.*

Forms to Letters

Level 2 Beginner

This course is an introduction to form layouts and how they can be used in *FileMaker Pro*. Learn how to design and use forms with drop down menus, radio buttons and checkboxes as well as how to create simple merged letters. You'll learn how to create, edit and apply value lists to various field types. Create buttons that link forms and letters for easy navigation to other layouts.

Prerequisites: Layout Tips & Tricks or equivalent experience.

1   *Learn efficient methods for placing new fields on a layout.*

2   *Learn to change between menu, list, radio button and check box using the Field Format dialog.*

3   *Learn to connect letters and forms to an Org page using buttons.*

4   *Learn to create or edit value lists and associate them with fields.*

5   *Learn to replace data globally across a Found Set of records.*

6   *Learn to set objects as non-printing.*

7   *Learn to use merge fields and understand how they are different from placed fields.*

8   *Make buttons for basic navigation.*

9   *Understand how to set margins in a letter layout.*

10 *Understand letters as a form and learn to create simple merged letters.*

11 *Understand the types of letter merge.*

12 *Understand when to use single record layouts.*

GENERATIONS Topics I: Constituent Management

Level 1 Beginner

This introductory course provides a thorough understanding of managing constituents. We'll look at how to create new constituents, add contact information, enter constituency and attribute codes, track solicitor/solicitee information, track Hon/Mem, adjust salutations, and track contract log items. We'll also look at the Event functionality and managing invitations.

Prerequisites: None

1   *Learn how addresses, phone numbers, work information, etc. are stored.*

2   *Learn how to associate a document with a constituent record.*

3   *Learn how to manage Events and Invitations.*

4   *Learn how to save Found Sets and when to use them.*

5   *Learn to configure Attributes to better organize constituents.*

6   *Learn to configure Solicitors and Hon/Mem designations.*

7   *Learn to create a new constituent and enter data.*

8   *Learn to globally add an attribute or a contact log item to a found set.*

9   *Understand how the Salutation, Addressee and Name As fields work.*

10 *Understand the Constituent Codes and how to find groups of constituents.*

GENERATIONS Topics II: Transactions

Level 1 Intermediate

We will spend our time in the Transactions file investigating how GENERATIONS tracks donations. We'll dig deep into managing simple gifts, matching gifts, and pledges in addition to learning how to schedule pledge payments, create pledge write-offs and track soft credits. Learn how to manage funds, campaigns and appeals and manage thank you letters.

Prerequisites: GENERATIONS Topics 1 or equivalent experience.

1   *Learn how to deal with gifts that are received after the end of the FY but attributed to the previous FY.*

2   *Learn how to deal with multi-year pledges.*

3   *Learn how to track matching gifts and soft credit constituents.*

4   *Learn to enter a pledge and schedule pledge payments.*

5   *Learn to enter a simple gift.*

6   *Learn to send acknowledgment letters.*

7   *Learn to write off a pledge.*

8   *Understand Funds, Campaigns and Appeals as presented in GENERATIONS.*

9   *Understand the child/master relationship between transaction records.*

GENERATIONS Topics III: Reporting

Level 1 Intermediate

We will spend the entire session examining the built-in reports in Transactions as well as the new advanced reports in GENERATIONS 3.5. For those of you in GN 3.0, we'll talk about what is involved in the creation of those advanced reports. We'll also discuss how you can meet your additional reporting needs, including the annual report, by exporting data.

Prerequisites: GENERATIONS Topics 1 or equivalent experience.

1   *Learn about the Advanced Reports and how to use them.*

2   *Learn powerful Find strategies using iR's FSLP model.*

3   *Learn to export data.*

4   *Understand how to troubleshoot data when the reports are displaying incorrect data.*

5   *Understand how to use the built-in FSLP reports in Transactions.*

Intro to Relational Design

Level 3 Beginner

This is an introduction to relational databases using *FileMaker Pro*. We will explore basic terms and concepts and examine how to use fields and portals to view related data tables. While understanding relational databases can be daunting, this session will dispel some of the mystery and answer the question, "Why are there so many different files and tables in my solution?"

Prerequisites: KEYSTONE Topics 1 or equivalent experience.

1   *Get an introduction to basic relational database concepts.*

2   *Get an introduction to the Relationship Graph by viewing iR solutions.*

3   *Learn the need for a "join" file to resolve many-to-many relationships.*

4   *Learn to create a portal object to view multiple related records in another table.*

5   *Learn to create a relationship between two tables.*

6   *Learn to create proper keys.*

7   *Learn to work with related data in another table.*

8   *Learn when to use parent files or child files for reporting.*

9   *Understand one-to-many relationships using student-family examples.*

10   *Understand pipelines and lookups for viewing or storing related data.*

11   *Understand what is a many-to-many relationship.*

Intro to Reporting

Level 2 Intermediate

This course will teach you how to create sub-summary reports that display grouped data and summary fields. Learn how to script the display of these reports and how to use isfields and summary fields to get summary totals and counts. This session builds on *Building Lists* which is critical to building automated reports.

Prerequisites: Building Lists or equivalent experience.

1   *Learn how to format reports.*

2   *Learn to create "is" fields and "Sum" fields for use in reports.*

3   *Learn to create and build navigation to reports.*

4   *Learn to create reports that break per page.*

5   *Learn to create scripted, sub-summary reports.*

6   *Learn to create sub-summary reports with break fields.*

7   *Learn to troubleshoot errant report scripts (printing, sorts, finds).*

8   *Understand the difference between found set reports and scripted reports.*

9   *Understand what a sub-summary report is and how it is used.*

Introduction to Layout Mode

This course will teach you the basic skills necessary for creating layouts in *FileMaker Pro*. Learn to manipulate draw objects, text objects, fields, and other layout tools to create attractive new layouts. *Intro to Layout Mode* is for anyone new to working in Layout mode and provides essential skills for those wishing to extend existing or develop new layouts.

Prerequisites: None

1   *Become familiar with the tools available in Layout mode.*
2   *Learn about Parts and Part colors and how to change them.*
3   *Learn about text alignment and font rules in Browse and Layout mode.*
4   *Learn about text changes such as font and size.*
5   *Learn how to format fields using borders and fill color and the iR guidelines for these.*
6   *Learn how to group, ungroup, and arrange objects in layers.*
7   *Learn the difference between field labels and fields.*
8   *Learn the difference between Layout and Browse mode and how to switch between them.*
9   *Learn the three different units on the layout screen and how to change between them.*
10   *Learn the types of FMP objects - square, round rec, circle, field, line, label - and how to select them.*
11   *Learn to align objects.*
12   *Learn to create, edit and manipulate line objects.*
13   *Learn to duplicate objects using both copy/paste and option-drag.*
14   *Learn to resize fields and objects and use the Inspector and Undo for assistance.*
15   *Learn to select multiple objects in several ways.*
16   *Learn to Unlock, Lock and Move objects.*

KEYSTONE Topics I: Enrollment Management

In this session we will explore how student and family information is stored and managed in KEYSTONE. You'll understand the different tables and files and how to easily and quickly navigate to what you need. We will also review the setup and use of the KEYSTONE Attendance file.

Prerequisites: None

1   *Examine the standard reports available in Students.*
2   *Learn how child records are linked to Family records and the difference between them.*
3   *Learn how to correctly admit or withdraw a student during the academic year.*
4   *Learn how to effectively use Link Families to add/update family relationships.*
5   *Learn how to effectively use Student and Family Name Flow screens.*
6   *Learn how to generate Attendance reports by student and by code.*
7   *Learn how to set up codes for teachers to use in taking attendance in Teacher Access Module.*
8   *Learn how to set up codes in Attendance for entry by student and by section.*
9   *Learn the difference between PermRecs and Student records.*
10   *Learn what information is transferred from PORTAL to KEYSTONE during admit.*
11   *Review basic navigation and structure of KEYSTONE.*
12   *Review standard KEYSTONE end-of-year procedures.*
13   *Understand the basic structure of KEYSTONE - Enrollment, Master Schedule, Registrations.*
14   *Understand the relationship between PORTAL and KEYSTONE and how family data is stored.*
15   *Understand what Enrollment records are and the critical fields stored there.*
16   *Understand what is triggered in KEYSTONE when PORTAL admits a student.*

KEYSTONE Topics II: Master Schedule

This session will cover the creation and management of Master Schedule resources: Courses, Rooms, Teachers, Timeblocks, and Sections. Most of these contain data that is created at implementation and is updated only occasionally. Section records are created for each academic year (or, in some cases, for each term) and are used in relation to a student record to build a registration record.

Prerequisites: KEYSTONE Topics 1 or equivalent experience.

1   *Examine the Master Schedule reports.*
2   *Learn about KEYSTONE Setup to manage Divisions, Marking Periods, Terms and Schedules.*
3   *Learn different ways to duplicate last year's schedule for the upcoming year.*
4   *Learn the concept of "inheritance" and "override" and how they allow for flexibility.*
5   *Learn the flexibility and limits within KEYSTONE for managing daily schedules.*
6   *Recognize the course attribute flags and how they affect section and student registration records.*
7   *Recognize the importance of the field "NameUnique" in teachers.*
8   *Understand Course records and how to create/edit them.*
9   *Understand room records and how to create/edit them.*
10 *Understand Section records and how to create/edit them.*
11 *Understand teacher records and how to create/edit them.*
12 *Understand the concepts of "timeblock" and "slot", and how timeblocks are created, edited and used.*
13 *Understand the resources needed for managing a master schedule and how they relate.*

KEYSTONE Topics III: Student Registrations, Grades/Comments, Transcripts & GPAs

In this session we will review how KEYSTONE handles the essential work of the school: student course registration. Learn to create and manage these registration records and how to utilize the Batch/Add and Drop/Add modules. Additionally, we'll examine the production of reports, transcripts, GPA calculations, and reporting. We look at how you can determine what is displayed on transcripts and grade reports. We will also examine the teacher interface or Teacher Access Module (TAM).

Prerequisites: KEYSTONE Topics 1 & II or equivalent experience.

1   *Learn about inheritance and what data in the StuReg record is related and what is looked up.*
2   *Learn about Overrides at the Student Registration level.*
3   *Learn how grades and comments are stored in the student registration record.*
4   *Learn how to update changes made to the GPE table through KEYSTONE.*
5   *Learn how to use Batch/Add to register groups of students into one or more section.*
6   *Learn how to use Drop/Add to create or make changes to an individual student's schedule.*
7   *Learn the basic elements of a Student Registration record and how to create it with the Creator List.*
8   *Learn the difference between Section Swap and Drop.*
9   *Learn the process of managing users in TAM.*
10 *Learn the purpose of "Refresh Credits/Schedules" and "Refresh GPE".*
11 *Learn to identify conflicts in Student Registrations.*
12 *Learn to properly configure Teacher Access Module (TAM) for a given Marking Period.*
13 *Learn to use the Change Log to confirm your work and identify errors.*
14 *Learn to use the Transcript Setup module and produce Transcripts.*
15 *Recognize section attributes and how they affect mark and schedule information in Stu Reg records.*
16 *Understand the difference between a Marking Period and a Term.*
17 *Understand the division settings and how they are used in KEYSTONE.*
18 *Understand the GPE table and how it is used in the GPA calculation process.*

Names & Text Calculations

This is an introductory course on creating calculated fields. Learn to combine text fields to make it easier to create salutations, labels, and perform mail merge. Learn how to use label fields to create mailing labels and connect your new label layouts to an organization screen. In addition, learn to create other calculations that increase your productivity.

Prerequisites: Layout Tips & Tricks and one other Customizing session.

1   Learn iR naming conventions for calculated name fields.

2   Learn to combine calculations within other calculations to create more complex fields.

3   Learn to create other types of calculations that increase automation. (he, she, son, daughter)

4   Learn to create text calculations combining simple fields into more complex fields.

5   Learn to open the Manage Database dialog and understand the basic features.

6   Learn what overrides are and understand the Name Flow screen in iR solutions.

7   Understand text calculations and when to use them.

8   Undertand the type of fields in FileMaker and when to use them.

9   Use the Label Wizard and field calculations to quickly build new labels.

PORTAL Topics I: Managing People

This session examines how to create, manage, and edit the "people" records needed for admissions. Child, family, consultant and current school records need to be properly created and linked. Finding and avoiding duplication is important, as well as understanding the need and proper marking of multiple child records for multiple inquiries in different years.

Prerequisites: None

1   Learn how PORTAL manages both new inquiries as well as current students.

2   Learn how to check for duplicates records and understand how to deal with them.

3   Learn how to track your letter correspondence with inquiries and their families.

4   Learn how to withdraw a child mid-year and to enroll a child mid-year.

5   Learn PORTAL vocabulary that is critical to understanding how PORTAL manages data.

6   Learn to create new inquiry records using the Input screen.

7   Learn to link a child to a contact record, ie: consultant, school or AN.

8   Learn to link or relink families to children and to create related second households.

9   Understand child and family names and how they are constructed.

10 Understand the difference between an inquiry, a future, a re-inquiry and a prospect.

11 Understand the difference between child data and family data.

PORTAL Topics II: Managing the Admissions Process

This session details the Admissions "funnel" and focuses on the App/Decision and Enrollment screens in PORTAL. Understanding the steps, the vocabulary and how to handle different cases is crucial to properly processing students and running reports. Switching from one year to the next needs to be understood in terms of timing as well as process.

Prerequisites: PORTAL Topics 1 or equivalent experience.

1   Learn how to process future, prospect and re-inquiry records.

2   Learn to adjust the required process status items and how to update existing records.

3   Learn to perform finds that pinpoint the group of inquiries you are looking for.

4   Understand both Admission and Enrollment grade fields and what they indicate.

5   Understand the Admission "funnel" process from start to finish.

6   Understand the Admission and Enrollment realms and how they affect reporting.

7   Understand the difference between YOE and Admission Season.

8   Understand why and how PORTAL manages both new and returning students.

9   Understand year-end procedures and steps required to completely roll your database forward.

PORTAL Topics III: Reporting

Strategic admission planning requires understanding your school's admission metrics. PORTAL has a suite of included reports that provide most of the needed compilations. We'll examine the existing reports in PORTAL and discuss what affects the reported numbers. We'll also discuss exporting data to Excel and other formats for additional reporting needs.

Prerequisites: PORTAL Topics 1 or equivalent experience.

1   *Examine the YTD reports and discuss how to extend these.*
2   *Learn about the standard charts and dashboards in PORTAL.*
3   *Learn ways to export data from PORTAL for further analysis.*
4   *Learn what affects the numbers that are reported for each.*
5   *Understand how YOE and Admission Year affect reporting.*
6   *Understand the Activity reports and the data that affects those reports.*
7   *Understand the Enrollment and Reenrollment reports.*
8   *Understand the iR difference between a List and a Report.*
9   *Understand the Performance reports and look at the data that affects those reports.*
10 *Understand what a "found set" report is.*

Problem Solving I

This course will explore how to use *FileMaker Pro* to solve problems and produce "instant" reports. This is an in-depth examination of the Find and Sort capabilities of FileMaker Pro. Even moderately experienced FileMaker users will find this very session very helpful.

Prerequisites: None

1   *Execute "and" finds with multiple criteria in the same record.*
2   *Execute "or" finds with multiple requests, with both Include and Omit.*
3   *Learn about double-word finds.*
4   *Learn finds with greater than/less than, ranges.*
5   *Learn special finds using symbols such as "=" and "*"*
6   *Learn the basics of FSLP or Find, Sort, Layout, Print for basic problem solving.*
7   *Learn to execute single criteria finds.*
8   *Learn to export data from the database.*
9   *Learn to sort records using both single and multiple fields.*
10 *Learn to sort records using value lists.*
11 *Learn to use Modify Last Find and Duplicate Request.*
12 *Understand how FSLP and Lists together create reports.*
13 *Understand printing issues.*

Problem Solving II & Data Cleaning Techniques

This course will extend the skill set of Problem Solving I. We will look at more advanced find techniques such as constrain and extend. We will learn techniques to find and correct bad data and examine how data problems can be masked by interface. You need to have a very solid understanding of finding and sorting for this course.

Prerequisites: Problem Solving I or equivalent experience.

1   *Create and execute plans to clean bad existing data.*
2   *Learn how interface items both hide problems and help when cleaning data.*
3   *Learn how list views and the replace command can be used to rapidly clean data.*
4   *Learn the limitations about performing finds in portals with related data.*
5   *Learn to use Constrain and Extend as an alternate method for multiple requests.*
6   *Learn to use Omit and Omit Multiple for cleaning.*
7   *Learn to use the index and list layouts for examining data.*
8   *Learn to use wildcard values to find and clean bad data.*
9   *Performing finds in portals with related data.*

10   *Practice basic finds with multiple requests.*

11   *Using Constrain and Extend the found set to build complex queries.*

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Beginner</td><td></td></tr>
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SANDBOX

SANDBOX is an easy-to-use K-8 solution that combines the tracking of both admissions data and enrolled student information. This session will examine where data is stored and how records move from the admissions realm to the registrar realm. We'll discuss some of the more common customizations that have been requested.

Prerequisites: None

1   *Discuss some of the more common customization to SANDBOX.*

2   *Understand end of year procedures.*

3   *Understand how children are admitted into the school, become students and then become archived.*

4   *Understand how SANDBOX organizes child and family data.*

SchoolForms Online Form Building

Learn the tricks of building effective forms in SFO and understand SFO workflow. We also will cover the many new features of SFO.

Prerequisites: None

1   *Learn how to create new forms, duplicate existing forms, delete forms.*

2   *Learn how to set values associated with elements.*

3   *Learn to build an enrollment deposit form and other payment forms.*

4   *Understand SFO workflow: How to create accounts, assign forms, retrieve forms and move data.*

5   *Understand the different form elements.*

6   *Understand the Field Map and how to map fields to your solution.*