



## Student Information System User Guide

This User Guide is designed to help you get started using the Student Information System. We'll take you step by step in using your organization's database, so that you can begin to use SIS right away.

### Login

Navigate to [cdfund.cityspan.com](http://cdfund.cityspan.com) in your web browser. Input your login credentials, which have been provided for you via email from [accountinfo@cityspan.com](mailto:accountinfo@cityspan.com).

Children's Defense Fund - Student Information System	
	<b>NOTICES:</b> <b>Monday, February 4, 2019</b> <b>Children's Defense Fund Student Information System Training Video</b> You can view a recording of the training by clicking the link below. <a href="#">Link to training video</a>
<b>LOGIN</b> Username: <input type="text" value="trainingdemo"/> Password: <input type="password" value="....."/> <a href="#">Forgot Password?</a> <input type="button" value="ENTER SYSTEM"/> <a href="#">Click here to download a copy of the SIS User Guide</a> <a href="#">Click here to download a copy of the SIS Upload Tool User Guide</a> <a href="#">Click here to download a copy of the Upload Data Dictionary</a> <a href="#">Click here to download a copy of the Upload Template</a> For assistance, call the Help Desk: <b>866-469-6884 (toll-free)</b> Mon-Fri, 8AM-5PM, Pacific Time	

### Toll-free Help Desk Support

Please be sure to contact our toll-free help desk if you have questions, problems, or have forgotten your password.

Our toll-free help desk phone number is **1-866-GO-YOUTH** or **1-866-469-6884**.

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### Editing Sponsor Organization and Site Information

Upon logging in, you will first want to update the Sponsor Organization and Site Information pages.

#### Step 1:

First, you will want to update your Site Information page by clicking the “Unlock” button to edit and then selecting “Save” and “Submit” once you have completed the form.

The screenshot shows the 'Children's Defense Fund - Student Information System' interface. On the left is a navigation menu with options: Sponsor Information, Site Information (highlighted), Registration, Activities & Attendance, CDF Reports, Add'l Reports, Upload, Utilities, Help Center, and User Accounts. The main content area is titled 'SITE INFORMATION' and contains a form for 'National Training - Training Site'. The form fields are: Site Name (Training Site), City (Edelmanville), State (DC), Status (Returning), Program Type (Summer Program), and Program Length (6 weeks). In the top right corner of the form, there are two buttons: 'Save' and 'Submit', which are circled in red.

#### Step 2:

After completing the Site Information page, you will want to navigate to the Sponsor Information page by clicking on “Sponsor Information” in the left menu. Once you are there, you can follow the same steps for completing the Site Information page and click “Submit” once the form has been completed.

**Children's Defense Fund - Student Information System** [Logout](#)

**Sponsor Information**

**SPONSOR INFORMATION** Save Submit

**National Training**

Sponsor Organization Name

National Training

City	State	ZIP
Edelmanville	DC ▼	12345

Status

Returning ▼

If you notice that your Sponsor or Site name is incorrect, you can contact Erica Fields with a change requests and it will be updated within 48 hours.

Once you have finished updating the form(s), click "Submit". **Sponsor and Site Information forms will be permanently locked on July 1<sup>st</sup>, 2019 at midnight.** If further updates are needed, please contact Erica Fields ([efields@childrensdefense.org](mailto:efields@childrensdefense.org)) to request that the form be unlocked.

## Registration

In this section you'll learn how to add Children, Servant Leader Interns, Project Directors, and Site Coordinators to the system.

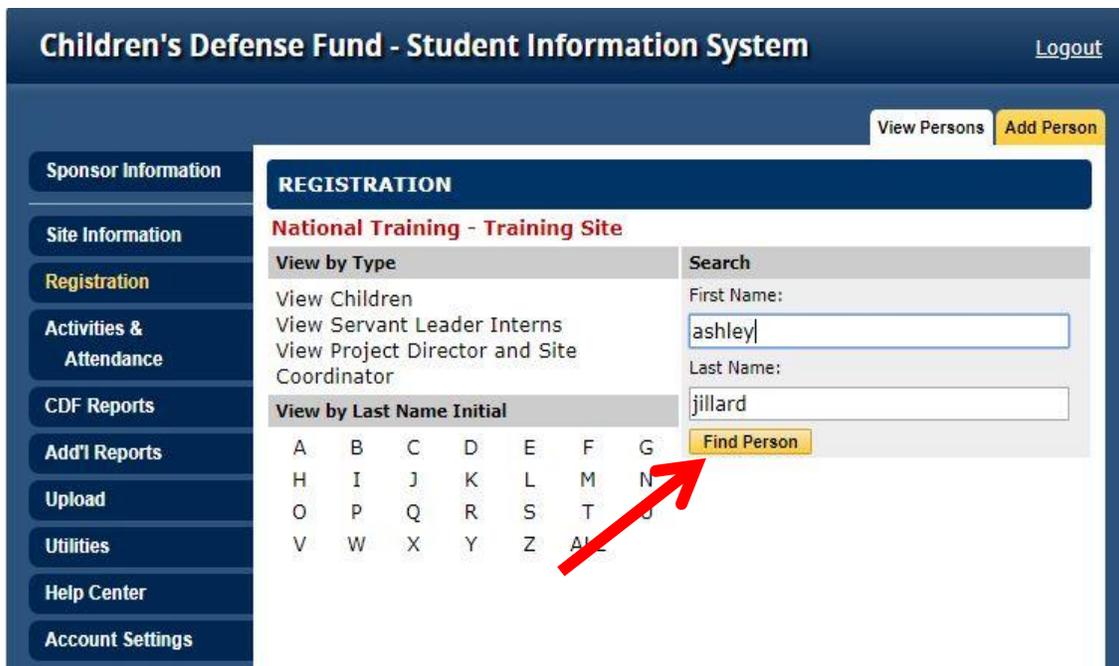
The screenshot shows the 'Children's Defense Fund - Student Information System' interface. On the left is a navigation sidebar with the following items: Sponsor Information, Site Information, Registration (highlighted with a red circle), Activities & Attendance, CDF Reports, Add'l Reports, Upload, Utilities, Help Center, and User Accounts. The main content area is titled 'SPONSOR INFORMATION' and includes 'Save' and 'Submit' buttons. Below this is a section for 'National Training' with a 'Sponsor Organization Name' field containing 'National Training'. A table below has columns for 'City', 'State', and 'ZIP', with values 'Edelmanville', 'DC', and '12345' respectively. A 'Status' dropdown menu is set to 'Returning'.

City	State	ZIP
Edelmanville	DC	12345

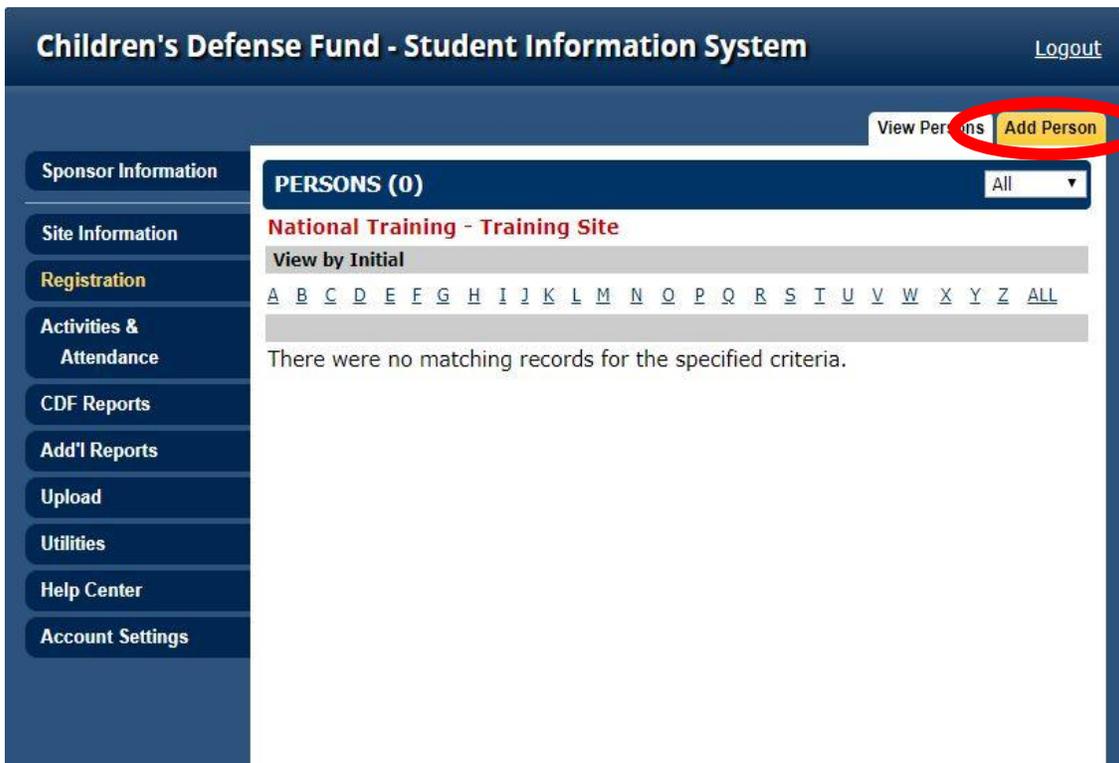
Status: Returning

## Adding Children

1. From the Sponsor Information screen, select the **Registration** tab from the left menu.
2. To create a **Child** record, first enter the youth's name in the **Search** fields and click "Find Person" to ensure that the participant is not already in the system. It is a good idea to get in the habit of searching the database for participants to prevent the creation of duplicate records for one individual. If the person is already in the system his or her name will appear, and you can then click on that name to enter data into their registration form. If there is more than one person with the same name, a list of all the names will appear along with their phone numbers to help distinguish between them.



3. If it is determined that the child is not in the system, click on the yellow **Add Person** tab and select the "Children" Person Type.



4. Enter the required registration information indicated by a red asterisk. You may also complete any additional fields to save time and reduce the risk of omitting relevant data from the child's record after it has been created. Once you have completed their form, click 'Add'. To view the record, click 'View Record' or continue to create new child records.

**Children's Defense Fund - Student Information System** [Logout](#)

[View Persons](#) [Add Person](#)

**REGISTRATION SUCCESSFUL**

Ashley Jillard has been successfully registered.

To view this record, click [View Record](#)

**CREATE NEW CHILDREN** [Cancel](#) [Add](#)

\* Child Last Name:

\* First:

Middle Name:

\* Birth Date:

\* Gender Identity:

\* Preferred Pronouns:

Home Street Address:

City:

State:

ZIP:

Status  Inactive  Active

Below is the participant record. Make sure to fill out all information as required on the Enrollment Form, especially any information that was not completed during the record creation process.

**Children's Defense Fund - Student Information System** [Logout](#)

[Enrollment Form](#) [Files](#) [Enrollment](#) [View Persons](#)

**Child** [Print](#) [Delete](#) [Save](#)

**INSTRUCTIONS: Please complete one form for each child enrolled in the CDF Freedom Schools program.**

**All REQUIRED fields are noted by an (\*) ASTERISK.**

Creation Date 4/9/2018, 3:23:58 PM (PT)

\* Child's Last Name: Jillard

Middle Name:

\* Child's First Name: Ashley

\* Birth Date: 3/16/2008

Age 10

\* Gender Identity: Female

\* Preferred Pronouns: She

Home Street Address:

City:

State:

ZIP:

Status  Inactive  Active

\* Child's Race/Ethnicity (check all that apply):

American Indian/Alaskan Native

Native Hawaiian or Pacific Islander

Asian

Black/African American

Hispanic/Latino

White

Other

### Adding Servant Leader Interns (Optional)

Click back to the "Registration" and click "Add Person" again, this time selecting Servant Leader Interns. Complete the form and view the record in the same steps as above when adding a child participant.

The screenshot shows the 'CREATE NEW PERSON' form in the Children's Defense Fund - Student Information System. The left sidebar contains navigation links: Sponsor Information, Site Information, Registration, Activities & Attendance, CDF Reports, Add'l Reports, Upload, Utilities, Help Center, and Account Settings. The main form area has a 'Person Type' dropdown menu with three options: Children, Servant Leader Interns (circled in red), and Project Director and Site Coordinator. Below the dropdown are input fields for First Name and Last Name, and an 'Add Person' button.

The screenshot shows the 'CREATE NEW PERSON' form in the Children's Defense Fund - Student Information System. The left sidebar contains navigation links: Sponsor Information, Site Information, Registration, Activities & Attendance, CDF Reports, Add'l Reports, Upload, Utilities, Help Center, and Account Settings. The main form area has a 'Person Type' dropdown menu with three options: Children, Servant Leader Interns (selected), and Project Director and Site Coordinator. A red arrow points to the 'Person Type' label. Below the dropdown are input fields for First Name, Last Name, Middle, and Birth Date. There are also sections for Gender Identity (Female, Male, Non-binary, Decline to state, Other) and Preferred Pronoun(s) (She, He, They, Other).

### Adding Project Directors and Site Coordinators (Optional)

To add a Project Director and/or Site Coordinator, repeat the steps above, but instead select the relevant Person Type when adding the person.

The screenshot shows the 'CREATE NEW PERSON' form. The 'Person Type' dropdown menu is open, showing three options: 'Children', 'Servant Leader Interns', and 'Project Director and Site Coordinator'. The 'Project Director and Site Coordinator' option is selected and circled in red. The form also includes fields for 'First Name' and 'Last Name', and an 'Add Person' button.

The screenshot shows the 'CREATE NEW PERSON' form with the following fields and values:

- \* Person Type:  Project Director and Site Coordinator
- \* First Name: Johnny
- \* Last Name: Funny
- \* Position: Project Director (PD)
- \* Home Mailing Address: 1111 Burch Grown
- \* Home City: Downside
- \* Home State: CA
- \* Home Zip Code: 0000
- \* Home Email Address: johnnyfunny@gmade.com
- \* Secondary Email Address: jfunny@goj.net
- \* Home Phone: 555-555-5550
- Secondary Phone:
- \* Cell Phone: 000-000-0000
- \* Gender Identity:
  - Female:
  - Male:
  - Non-binary:
  - Decline to state:
  - Other:

Once all staff have been registered into the system they will be displayed on any staff drop-down menus in the system. Click the View Record button to continue filling out the registration form for the staff person.

## Activities & Attendance

This section will guide you through the process of creating an activity and taking attendance. You will create the service name, select service categories, create the service schedule, assign staff, and enroll participants.

### Creating Activities

1. From the left menu, select the "Activities & Attendance" tab, this is where a list of your activities will be displayed once you have created them. To add an activity, click the "Add Activity" tab in the upper right corner.



**Children's Defense Fund - Student Information System** [Logout](#)

View Activities View Groups View Events Weekly Attendance **Add Activity**

**ACTIVITIES** Current Term ▾

**National Training - Training Site** 7/1/2017 to 8/30/2018

View by Initial

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Page 1

Name	Begin	End
<a href="#">IRC Level 1 - David</a>	1/22/18	3/30/18
<a href="#">IRC LEVEL 2</a>	3/19/18	3/20/18
<a href="#">IRC Level 2 - Arianna</a>	1/22/18	1/31/18
<a href="#">live training</a>	3/27/18	3/29/18
<a href="#">Summer 2017 Arts &amp; Craft</a>	6/15/17	8/1/17
<a href="#">Test</a>	4/11/18	4/27/18
<a href="#">test</a>	3/19/18	3/23/18

2. Enter the Service Name and select a Service Type. Once you select "Activities" as the service type the next screen you see will ask you to select an Activity Type.

**Children's Defense Fund - Student Information System** [Logout](#)

[View Activities](#) [View Groups](#) [View Events](#) [Weekly Attendance](#) [Add Activity](#)

**CREATE ACTIVITY** [Cancel](#) [Save & Proceed](#)

**Service Name**  
Test

**Service Type**

- Activities (Services for which attendance will be recorded)
- Event (Services for which attendance will not be recorded)

Sidebar navigation: Sponsor Information, Site Information, Registration, **Activities & Attendance**, CDF Reports, Add'l Reports, Upload, Utilities, Help Center, User Accounts

3. Activity Types are based off IRC levels (If your activity will be a Parent Meeting then you will select Parent Meeting from the drop down list). Click Save & Proceed when finished.

**Activity Type**

Activity Type: IRC Level I (Grades K-2)

- IRC Level I (Grades K-2)
- IRC Level II (Grades 3-5)
- IRC Level III (Grades 6-8)
- IRC Level IV (Grades 9-12)
- Parent Meeting

4. You will now be directed to the General Info page for this activity. Proceed to creating a schedule for this activity by selecting the "Edit" button next to the "Schedule" section.

**Children's Defense Fund - Student Information System** [Logout](#)

General Info | **Enrollment** | Attendance | Reports | Activity List

**ACTIVITY** **Delete**

**Test**

Activity Type		<b>Edit</b>
Activity Type	IRC Level I (Grades K-2)	
Schedule		<b>Edit</b>
Staff		<b>Edit</b>

5. The next screen gives you the option to add Multiple Dates or a Single Date to the schedule. In general, if the service will only take place once (like an event) then the Single Date option should be used. For services that will take place over the course of a semester or a year, the Multiple Dates option should be chosen.

**Children's Defense Fund - Student Information System** [Logout](#)

**ADD DATE(S) TO SCHEDULE** **Cancel**

**Test**

[To add \*\*Multiple Dates\*\* to the schedule, click here](#)

[To add a \*\*Single Date\*\* to the schedule, click here](#)

- If you choose Multiple Dates, enter the begin date, end date and the times for each day that the service will be in session. Click the **Add Multiple Dates** button to add the schedule to the activity.

**Children's Defense Fund - Student Information System** [Logout](#)

**ADD DATE(S) TO SCHEDULE** [Cancel](#)

**Test**

To Add Multiple Dates to the Schedule

**Step 1:** Enter Begin Date (mm/dd/yy): Begin Date: 4/11/2018

**Step 2:** Enter End Date (mm/dd/yy): End Date: 4/27/2018

**Step 3:** Select the Begin and End Times for each class day.

Day	Begin Time	End Time
Monday		
Tuesday		
Wednesday	7:00 AM	12:00 PM
Thursday		
Friday	7:00 AM	
Saturday		
Sunday		

**Step 4:** Click "Add Multiple Dates".

[Add Multiple Dates](#)

- If you click on Single Date, enter the date, the begin time, and end time. Click on the **Add Single Date** button.

**Children's Defense Fund - Student Information System** [Logout](#)

**ADD DATE TO SCHEDULE** [Cancel](#)

**Test**

To Add a Single Date to the Schedule

**Step 1:** Enter Date (mm/dd/yy): Date: 4/18/2018

**Step 2:** Enter Begin Time: Begin Time: 8:15 AM

**Step 3:** Enter End Time: End Time: 11:15 AM

**Step 4:** Click Add Single Date [Add Single Date](#)

- A page with all scheduled dates is displayed. If the activity will not meet on certain dates (e.g. holidays etc.), you may select those dates and click "Delete Selected" to update the schedule.

**Children's Defense Fund - Student Information System** [Logout](#)

General Info **Enrollment** Attendance Reports **Activity List**

**SCHEDULE** Add Dates Delete Selected Return

**Test**

Page 1

Select All Unselect All

Select	Date	Begin	End	Time
<input type="checkbox"/>	Wednesday, April 11, 2018	7:00 AM	12:00 PM	<a href="#">Time</a>
<input type="checkbox"/>	Friday, April 13, 2018	7:00 AM	12:00 PM	<a href="#">Time</a>
<input type="checkbox"/>	Wednesday, April 18, 2018	7:00 AM	12:00 PM	<a href="#">Time</a>
<input type="checkbox"/>	Friday, April 20, 2018	7:00 AM	12:00 PM	<a href="#">Time</a>

If you would like to make changes to the time(s) selected for any dates within the schedule, you can do so by clicking the "Time" link in the Schedule screen. (see below)

**Upload**

**Utilities**

**Help Center**

**User Accounts**

<input type="checkbox"/>	Wednesday, April 25, 2018	7:00 AM	12:00 PM	<a href="#">Time</a>
<input type="checkbox"/>	Friday, April 27, 2018	7:00 AM	12:00 PM	<a href="#">Time</a>
<input type="checkbox"/>	Tuesday, May 1, 2018	9:00 AM	1:15 PM	<a href="#">Time</a>
<input type="checkbox"/>	Wednesday, May 2, 2018	9:00 AM	1:15 PM	<a href="#">Time</a>
<input type="checkbox"/>	Thursday, May 3, 2018	8:30 AM	2:45 PM	<a href="#">Time</a>
<input type="checkbox"/>	Friday, May 4, 2018	10:15 AM	4:45 PM	<a href="#">Time</a>

**Children's Defense Fund - Student Information System** [Logout](#)

Sponsor Information **ADJUST SERVICE TIME** Cancel Save & Return Save & Next

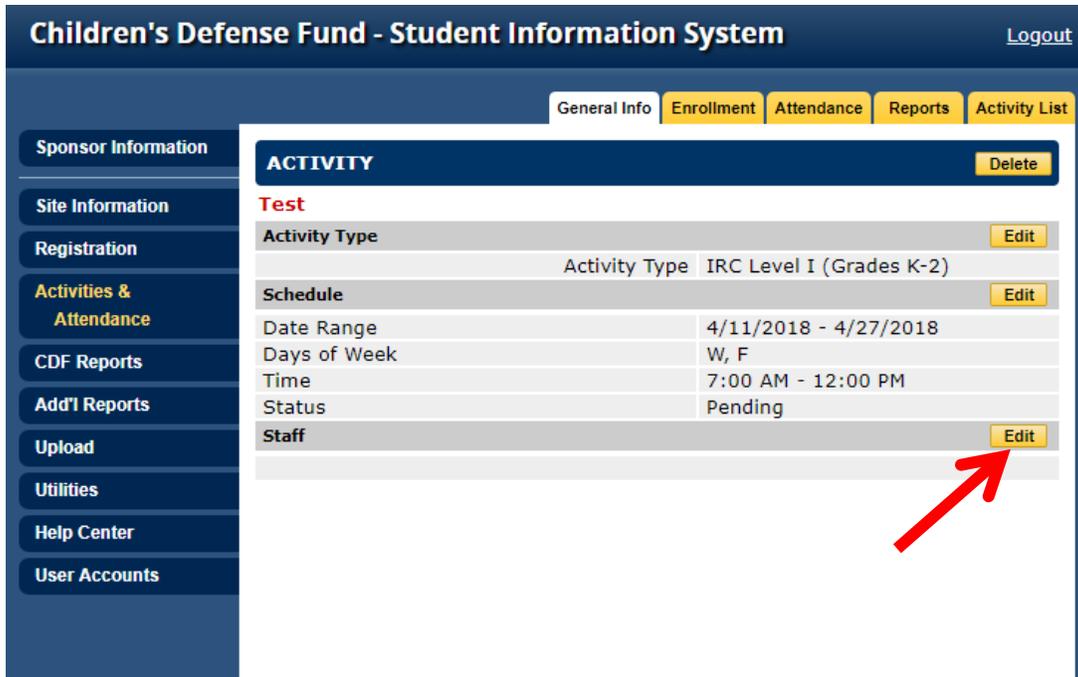
**Test** **Tuesday, May 1, 2018**

**Warning: Adjusting the service begin time or end time of a day with attendance resets the begin and endtime of all attendees.**

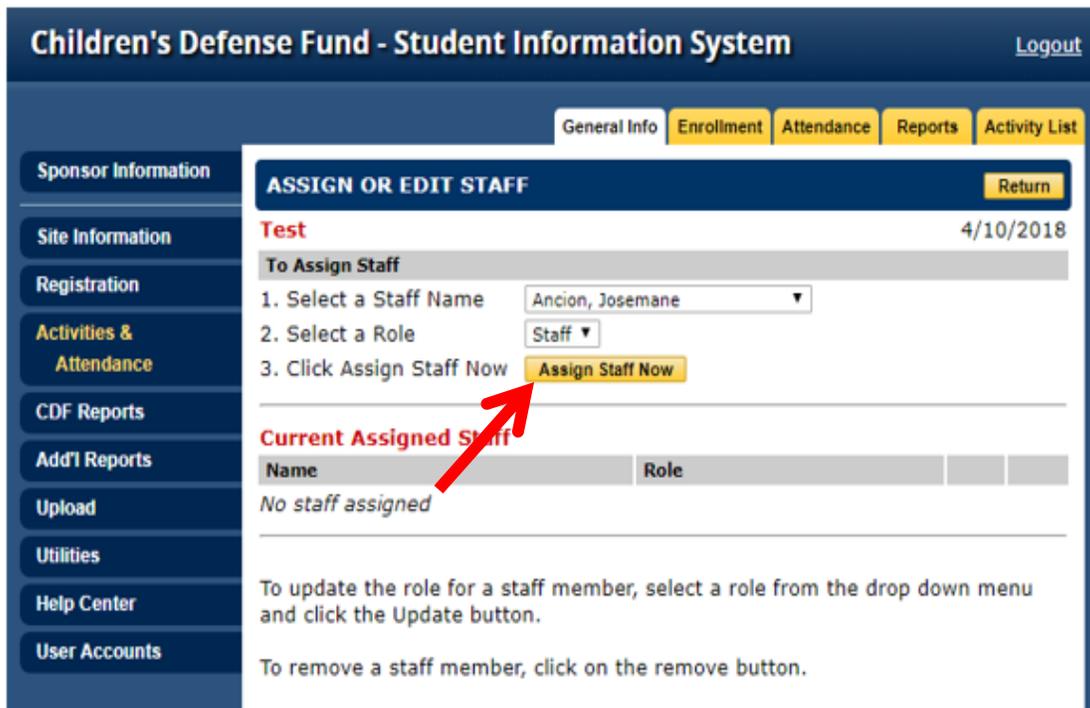
Current Begin	Current End	New Begin	New End
9:00 AM	1:15 PM	9:00 AM	1:15 PM

**Note: Steps 9 – 11 are optional.**

- 9. To assign a Staff Member to the activity, click the Return button to go back to the main General Info page when done. Then select the "Edit" button next to the Staff section.



- 10. Select a staff name from the drop-down menu to assign a staff member to the activity.



11. The staff member has now been assigned to the activity. You can add multiple staff members to an activity by repeating the steps above.

### Enrolling Participants

Once the activity information has been entered, you can begin enrolling participants into the activity. Select the Activity Name and then click on the “Enrollment” tab. Then select the “Click here to enroll new participants” link to begin enrollment.

**ENROLL PARTICIPANT** Logout

**ENROLL PARTICIPANT** Return

Test

**STEP 1: FIND PARTICIPANTS**

Find by Last Name Initial | Find by Name

A B C D E F G | Integrated Reading Curriculum (IRC) Level  
 H I J K L M N |  
 O P Q R S T U | First Name  
 V W X Y Z ALL | Ashley  
 | Last Name  
 | Jillard

Grade  Pre-K  7  
 K  8  
 1  9  
 2  10  
 3  11  
 4  12  
 5  Graduated  
 6  Value Missing

Person Type  
 |  
 |

**Find Person**

**STEP 2: SELECT PARTICIPANTS** Next Step

Choose participants to enroll then click "Next Step". Select **All / None**

Enroll	Participant Name	Date of Birth
<input type="checkbox"/>	Jillard, Ashley	3/16/2008

You may search for participants by various parameters. In this case we searched by First and Last Name. The results are displayed at the bottom of the screen where you can check off the participants you wish to enroll in the activity and then click "Next Step".

The screen that follows will ask you to verify the enroll date of the participant and make further adjustments as needed. Once you are finished click on "Next Step".

**ENROLL PARTICIPANT** Logout

**ENROLL PARTICIPANT** Cancel

Test

**STEP 3: SELECT ENROLL DATE(S)** Next Step

**Participant(s) will be enrolled according to the dates indicated.** You may enter alternate dates, set all dates to today's date or set all dates to the beginning of the service.

Participant Name	Enroll Date
Jillard, Ashley	4/11/2018

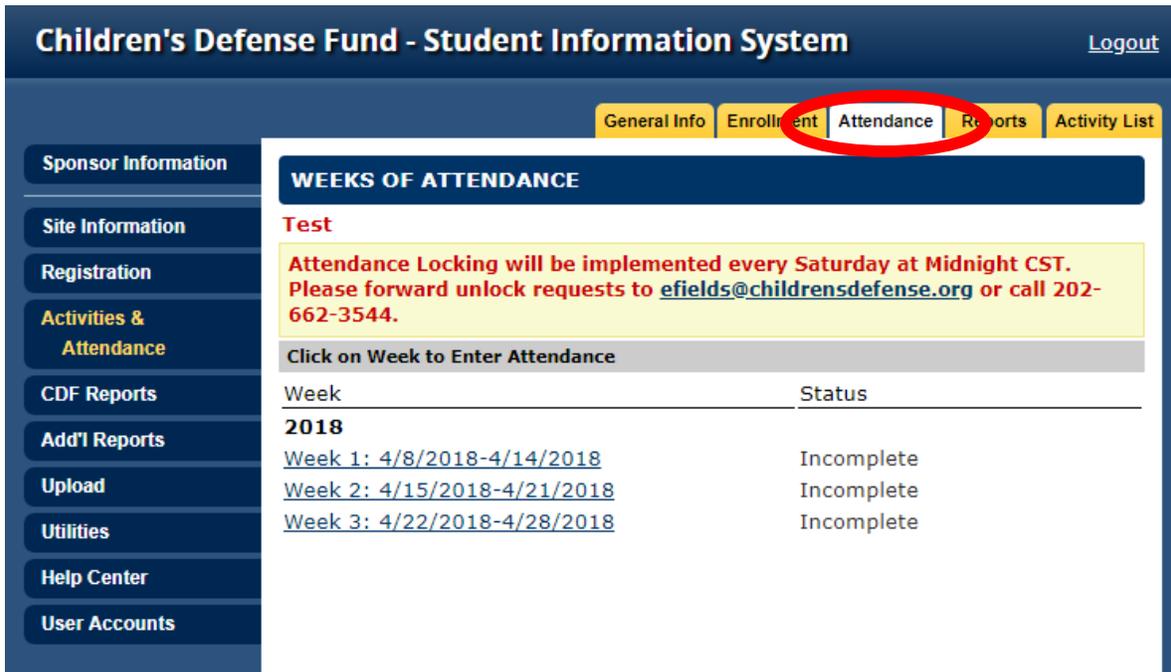
**Next Step**

You are now finished enrolling participants and will be able to confirm enrollment. To see a list of participants you enrolled in the activity you can click on the activity and select the "Enrollment" tab to view the list.

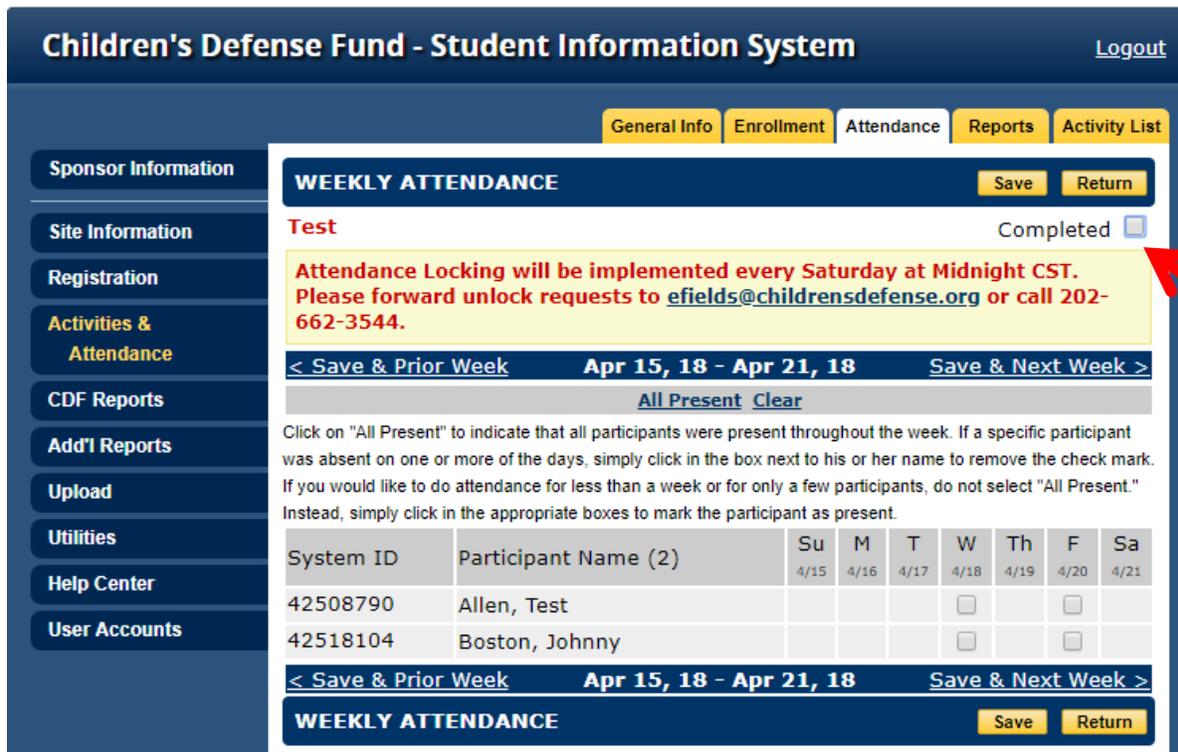
Name	Age	Status	Start Date	Drop Date	Edit
Allen, Test		Enrolled	4/11/18	n/a	<a href="#">Edit</a>
Andrews, Susan		Enrolled	4/11/18	n/a	<a href="#">Edit</a>

### Activity Attendance

To take attendance for the activity click on the "Attendance" tab as shown below:



Select the week you will be taking attendance for and enter attendance by selecting the correct checkboxes. Once you are finished, click save and select the "Completed" checkbox.



### Weekly Attendance Data Entry

There is also an alternate method to taking attendance. Click on the Activities and Attendance tab to view your activities list. Then select the Weekly Attendance tab shown below.

**Children's Defense Fund - Student Information System** Logout

View Activities View Groups View Events **Weekly Attendance** Add Activity

**ACTIVITIES** Current Term ▼

**National Training - Training Site** 7/1/2017 to 8/30/2018

View by Initial

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Page 1

Name	Begin	End
<a href="#">IRC Level 1 - David</a>	1/22/18	3/30/18
<a href="#">IRC LEVEL 2</a>	3/19/18	3/20/18
<a href="#">IRC Level 2 - Arianna</a>	1/22/18	1/31/18
<a href="#">live training</a>	3/27/18	3/29/18
<a href="#">Summer 2017 Arts &amp; Craft</a>	6/15/17	8/1/17
<a href="#">Test</a>	4/11/18	4/27/18
<a href="#">test</a>	3/19/18	3/23/18

**Children's Defense Fund - Student Information System** Logout

View Activities View Groups View Events **Weekly Attendance** Add Activity

**WEEKS OF ATTENDANCE**

**National Training - Training Site**

**Attendance Locking will be implemented every Saturday at Midnight CST. Please forward unlock requests to [efields@childrensdefense.org](mailto:efields@childrensdefense.org) or call 202-662-3544.**

Click on Week to Enter Attendance

<b>2017</b>	<b>2018</b>
<a href="#">7/2/2017-7/8/2017</a>	<a href="#">1/21/2018-1/27/2018</a>
<a href="#">7/9/2017-7/15/2017</a>	<a href="#">1/28/2018-2/3/2018</a>
<a href="#">7/16/2017-7/22/2017</a>	<a href="#">2/4/2018-2/10/2018</a>
<a href="#">7/23/2017-7/29/2017</a>	<a href="#">2/11/2018-2/17/2018</a>
<a href="#">7/30/2017-8/5/2017</a>	<a href="#">2/18/2018-2/24/2018</a>
	<a href="#">2/25/2018-3/3/2018</a>
	<a href="#">3/4/2018-3/10/2018</a>
	<a href="#">3/11/2018-3/17/2018</a>
	<a href="#">3/18/2018-3/24/2018</a>
	<a href="#">3/25/2018-3/31/2018</a>
	<a href="#">4/8/2018-4/14/2018</a>
	<a href="#">4/15/2018-4/21/2018</a>
	<a href="#">4/22/2018-4/28/2018</a>

Once you click into the week you are taking attendance for you will be given a list of participants with the activity they are enrolled in listed in parentheses. This will list all activities on a given day so that you do not have to go into each activity separately to take attendance.

**Children's Defense Fund - Student Information System**
[Logout](#)

Sponsor Information

Site Information

Registration

Activities & Attendance

CDF Reports

Add'l Reports

Upload

Utilities

Help Center

User Accounts

**WEEKLY ATTENDANCE**
Save Return

Attendance Locking will be implemented every Saturday at Midnight CST. Please forward unlock requests to [efields@childrensdefense.org](mailto:efields@childrensdefense.org) or call 202-662-3544.

< Save & Prior Week
**Apr 15, 18 - Apr 21, 18**
Save & Next Week >

All Present Clear

Click on "All Present" to indicate that all participants were present throughout the week. If a specific participant was absent on one or more of the days, simply click in the box next to his or her name to remove the check mark. If you would like to do attendance for less than a week or for only a few participants, do not select "All Present." Instead, simply click in the appropriate boxes to mark the participant as present.

System ID	Participant Name (6)	Su	M	T	W	Th	F	Sa
		4/15	4/16	4/17	4/18	4/19	4/20	4/21
42508790	Allen, Test (Test)				<input type="checkbox"/>		<input type="checkbox"/>	
42518123	Baldwin, Darlene (Summer Painting)			<input checked="" type="checkbox"/>		<input type="checkbox"/>		
46803146	Baptist, John (Summer Painting)			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
42518104	Boston, Johnny (Test)				<input type="checkbox"/>		<input type="checkbox"/>	
46799191	Brandon, Stacey (Test)				<input type="checkbox"/>		<input type="checkbox"/>	
42518045	Brown, James (Test)				<input type="checkbox"/>		<input type="checkbox"/>	

< Save & Prior Week
**Apr 15, 18 - Apr 21, 18**
Save & Next Week >

**WEEKLY ATTENDANCE**
Save Return

### Special Events (Optional)

You can set up events in the system (Services for which attendance totals are entered).

**Children's Defense Fund - Student Information System**
[Logout](#)

View Activities
View Groups
View Events
Weekly Attendance
Add Activity

Sponsor Information

Site Information

Registration

Activities & Attendance

CDF Reports

Add'l Reports

Upload

Utilities

Help Center

User Accounts

**CREATE ACTIVITY**
Cancel Save Proceed

**Service Name**

**Service Type**

Activities (Services for which attendance will be recorded)

Event (Services for which attendance will not be recorded)

On the next screen you will select from a dropdown of choices under Activity Type. Be sure to select the type that pertains to the event.

**Children's Defense Fund - Student Information System** [Logout](#)

**CREATE ACTIVITY** Save & Proceed

**Event Type**

Event Type

**Event Attendance**

Event Attendance

- Arts Performance
- Athletic Activity
- Civic Edu. Event
- Cultural Outing
- Film/Movie
- Finale
- Health and Wellness Event
- Lecture
- Museum Trip
- Musical Performance
- National Day of Social Action
- National Park
- Outdoors Field Trip
- Sports Event
- Theatre Event
- Theme Park

For Event Attendance you input the number for total attendees for the event/

**Children's Defense Fund - Student Information System** [Logout](#)

**CREATE ACTIVITY** Save & Proceed

**Event Type**

Event Type

**Event Attendance**

Event Attendance

Click "Save & Proceed" and on the following screen you can update the schedule and/or assign staff just as you did for regular activities.

**Children's Defense Fund - Student Information System** [Logout](#)

General Info **Event List**

**ACTIVITY** [Delete](#)

**Outdoors Field Trip**

Event Type [Edit](#)

Event Type Outdoors Field Trip

Event Attendance [Edit](#)

Event Attendance 200

Schedule [Edit](#)

Staff [Edit](#)

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Once you are finished and can select Event List and you will be directed the Events page which lists all of your Events.

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[View Activities](#) [View Groups](#) [View Events](#) [Weekly Attendance](#) [Add Activity](#)

**EVENTS** [Current Term](#)

**National Training - Training Site** **7/1/2017 to 8/30/2018**

View by Initial

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Page 1

Name	Begin	End
<a href="#">BBQ Cookout</a>	4/17/18	4/17/18
<a href="#">Outdoors Field Trip</a>	4/18/18	4/25/18

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### Attendance Locking

Attendance locking will be implemented every Saturday at Midnight CST. Unlock requests will have to be sent to [efields@childrensdefense.org](mailto:efields@childrensdefense.org). To see how attendance locking is displayed you can click on an activity from the activity list.

The screenshot shows the 'Children's Defense Fund - Student Information System' interface. The 'Attendance' tab is selected. The 'ACTIVITY' section displays details for an activity named 'Test'. The details include:

- Activity Type:** IRC Level I (Grades K-2)
- Schedule:** 4/11/2018 - 5/31/2018
- Days of Week:** M, Tu, W, Th, F
- Time:** Mixed - Mixed
- Status:** In Progress
- Staff:** Josemane Ancion -

Then select any week prior to the current weeks date range to see that it has been locked.

The screenshot shows the 'WEEKS OF ATTENDANCE' section for 'IRC Level 1 - David'. A yellow warning box states: 'Attendance Locking will be implemented every Saturday at Midnight CST. Please forward unlock requests to [efields@childrensdefense.org](mailto:efields@childrensdefense.org) or call 202-662-3544.' Below this is a table of attendance weeks for 2018. A red arrow points to the 'Help Center' link in the left sidebar.

Week	Status
<b>2018</b>	
<a href="#">Week 1: 1/21/2018-1/27/2018</a>	Complete
<a href="#">Week 2: 1/28/2018-2/3/2018</a>	Complete
<a href="#">Week 3: 2/4/2018-2/10/2018</a>	Complete
<a href="#">Week 4: 2/11/2018-2/17/2018</a>	Incomplete
<a href="#">Week 5: 2/18/2018-2/24/2018</a>	Incomplete
<a href="#">Week 6: 2/25/2018-3/3/2018</a>	Incomplete
<a href="#">Week 7: 3/4/2018-3/10/2018</a>	Incomplete
<a href="#">Week 8: 3/11/2018-3/17/2018</a>	Incomplete
<a href="#">Week 9: 3/18/2018-3/24/2018</a>	Incomplete
<a href="#">Week 10: 3/25/2018-3/31/2018</a>	Incomplete

You will see that the attendance markers are set to read only for any previous weeks because those weeks have been now been locked. The marked attendance is displayed but no additional attendance can be entered for that week unless you submit an unlock request to have.

**Children's Defense Fund - Student Information System**
[Logout](#)

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**WEEKLY ATTENDANCE**
Save Return

**Test** Completed

Attendance Locking will be implemented every Saturday at Midnight CST. Please forward unlock requests to [efields@childrensdefense.org](mailto:efields@childrensdefense.org) or call 202-662-3544.

**Apr 8, 18 - Apr 14, 18**
Save & Next Week >

All Present
Clear

Click on "All Present" to indicate that all participants were present throughout the week. If a specific participant was absent on one or more of the days, simply click in the box next to his or her name to remove the check mark. If you would like to do attendance for less than a week or for only a few participants, do not select "All Present." Instead, simply click in the appropriate boxes to mark the participant as present.

System ID	Participant Name (27)	Su 4/8	M 4/9	T 4/10	W 4/11	Th 4/12	F 4/13	Sa 4/14
42508790	Allen, Test				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518093	Andrews, Susan				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518101	Bear, Suger				<input checked="" type="checkbox"/>		<input type="checkbox"/>	
42518104	Boston, Johnny				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518067	bourke, rachel				<input checked="" type="checkbox"/>		<input type="checkbox"/>	
46799191	Brandon, Stacey				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518092	Brown, Bobby				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518045	Brown, James				<input checked="" type="checkbox"/>		<input type="checkbox"/>	
42518070	Brown, Mike				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518110	Bryant, Bean				<input type="checkbox"/>		<input checked="" type="checkbox"/>	
46799190	Burks, Rebecca				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
46799192	Burns, Rebecca				<input checked="" type="checkbox"/>		<input type="checkbox"/>	
42170136	Canada, Janet				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518060	Carmicheal, Susie				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
46799189	Chris, Gregory				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518091	Clark, Morgan				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518082	Cole, natalie				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518109	Cool, LJ				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518048	Jackson, Janet				<input checked="" type="checkbox"/>		<input type="checkbox"/>	
42518099	jane, marilyn				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
46797180	Jillard, Ashley				<input checked="" type="checkbox"/>		<input type="checkbox"/>	
42518049	Johnson, Dave				<input type="checkbox"/>		<input checked="" type="checkbox"/>	
42518089	Johnson, Maprika				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518095	Johnson, Richard				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518103	Johnson, Shaquonsis				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42518087	jones, andre				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
42517930	Jones, Fred				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

**Apr 8, 18 - Apr 14, 18**
Save & Next Week >

**WEEKLY ATTENDANCE**
Save Return

**Multi- Day Attendance Sheet**

The following report is the Multi Day Attendance Sheet which is located under the Add'l Reports menu.

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**REPORTS**

**National Training - Training Site**

Choose a Report

**Attendance Collection Tools**

**Multi-Day Attendance Sheet**

This report allows users to print attendance sheets spanning up to 10 days for each service that meets within the specified time period.

**Single Day Attendance Sheet**

This report allows users to print attendance sheets for all services that meet on a given day.

**Attendance Reports**

**Average Daily Attendance**

Average daily attendance listed by service. Combined average daily attendance also listed.

**Attendance by Date**

This report lists Present/Absent/Unknown attendance totals, broken down by date, for group services.

**Attendance by Service**

This report lists Present/Absent/Unknown attendance totals, broken down by date, for participants.

**Attendance by Participant**

"Attendance Roster by Service". The attendance for each participant in each service they are enrolled in.

**Participants by Number of Absences**

"Absentee Roster Report". The dates and services for which each participant was absent.

**Services with Missing Attendance**

Missing attendance data, broken down by service. This report will identify scheduled service sessions where zero attendance was entered. It will not identify partially complete attendance. To find partially complete dates, run Missing Attendance by Participant instead.

**Lists and Labels**

**Participant Mail Labels**

**Participant File Folder Labels**

**Staff Mail Labels**

**Query Tool and Report Builder**

**Query Tool**

Advanced search tool that selects a group of persons by filtering on custom inputs of properties.

**Custom Report Builder**

Build your own list of persons based on a set of criteria defined by a query tool result.

For an attendance sheet for a particular service, look under the heading **Attendance Collection Tools**, and click on **Multi-Day Attendance Sheet**.

Enter the **Begin Date** for the first date you would like to print an attendance sheet, and then select the **Number of Days** you would like on the attendance sheet (you are allowed up to 10 days). Then mark the checkbox next to the service you're interested in, and finally click the **Generate Report** button.

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**MULTI-DAY ATTENDANCE SHEET**

**National Training - Training Site**

**Enter Report Parameters**

Begin Date (mm/dd/yy)

Number of Days

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

Extra Attendance Rows (Optional)

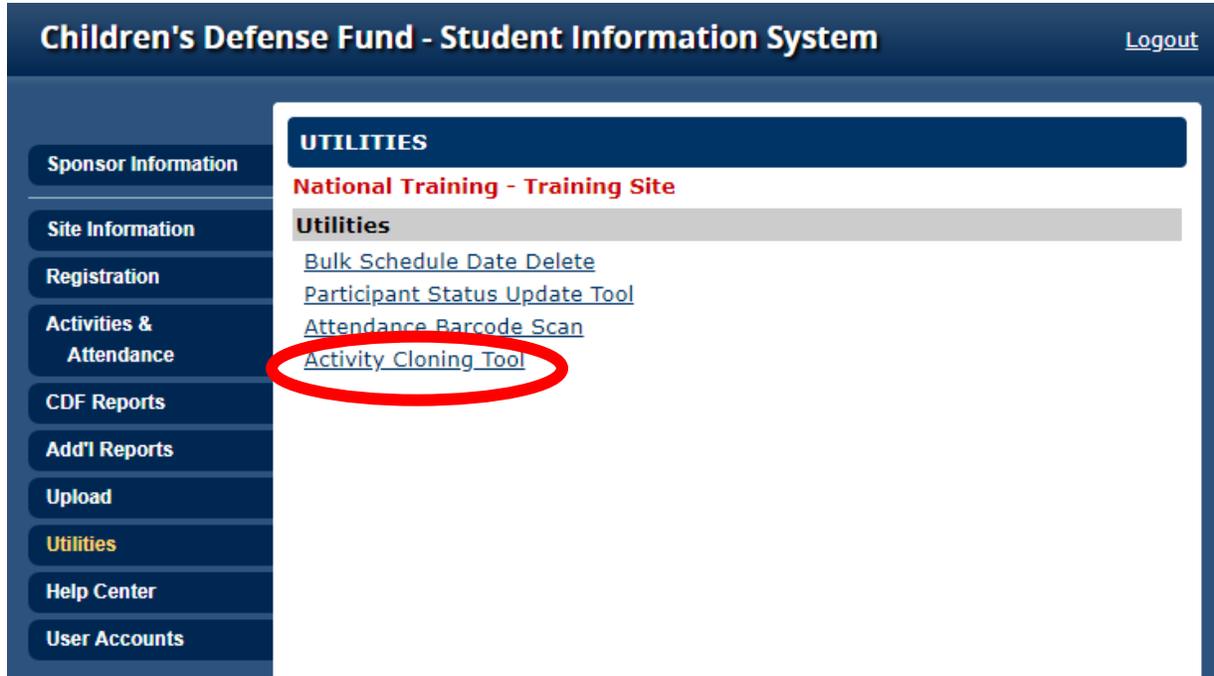
Services  
(Select [All](#)/[None](#))

- IRC Level 1 - David
- IRC LEVEL 2
- IRC Level 2 - Arianna
- live training
- Summer 2017 Arts & Craft
- test
- Test

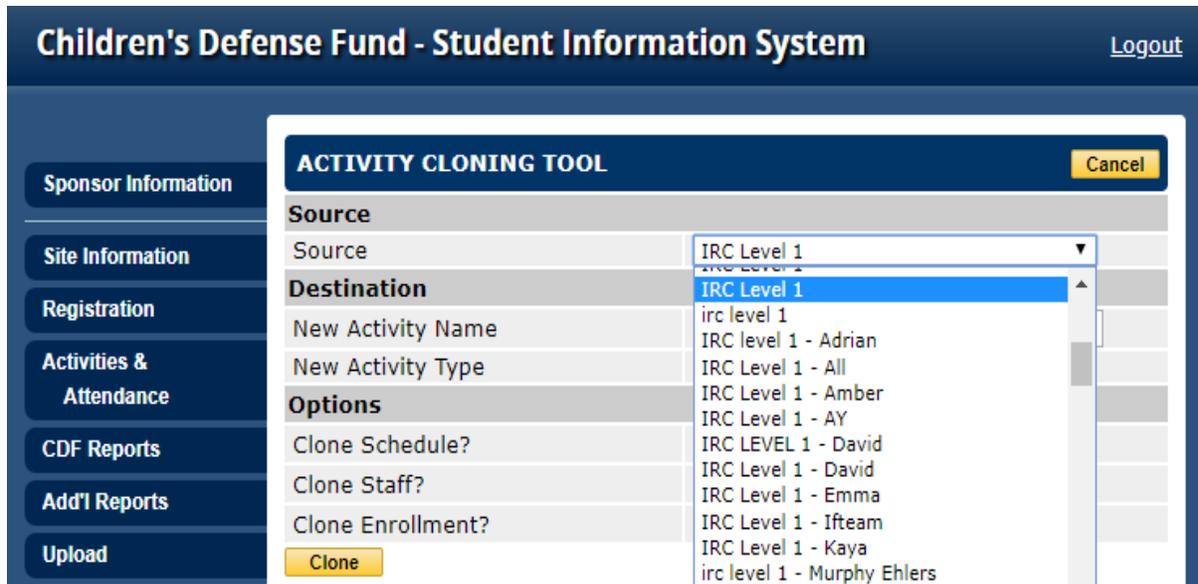


### Activity Cloning Tool

The activity cloning tool can be used to clone activities so that you do not have to manually re-enter activities that have the same information. It can be found under the Utilities left menu tab.



You can select the source activity and then fill out the information for the new activity that you wish to create. The section for “options” lets you choose which parts from the source activity should be cloned into the new activity.



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**ACTIVITY CLONING TOOL** [Cancel](#)

**Source**

Source

**Destination**

New Activity Name

New Activity Type

**Options**

Clone Schedule?

Clone Staff?

Clone Enrollment?

[Clone](#)

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**ACTIVITY CLONING TOOL** [Cancel](#)

**Source**

Source

**Destination**

New Activity Name

New Activity Type

**Options**

Clone Schedule?

Clone Staff?

Clone Enrollment?

[Clone](#)

IRC Level II has been created.

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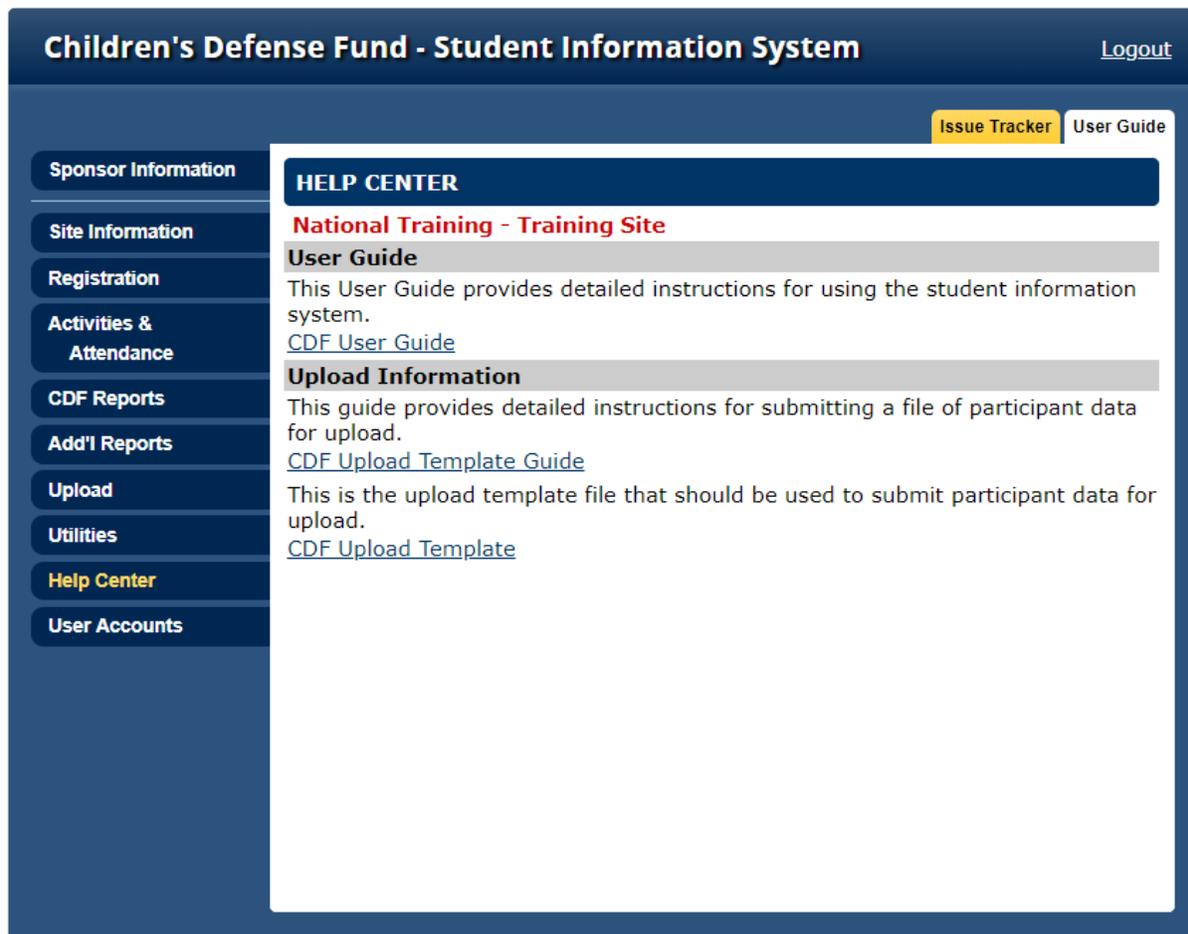
**Utilities**

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## Help Center

In this section you can find access to a copy of this User Guide as well as resources for using the Upload Tool, which is not covered in this guide. You can also access the Issue Tracker where you can send messages directly to our Support team. You can expect a response within 24 hours.



## Creating User Accounts

There are various types of users and the type of permissions you select for each individual user will depend heavily on their role within the organization, and further on whether they should have access to certain information that may be considered sensitive, like the names of Children participating in the programs at your site.

If you would like to create an account for one of your team members, select the "User Accounts" tab from the left menu and then select "Add User" to be taken to a screen where you can create a new user account. Please note that any users you create accounts for through the Student Information System will not automatically receive their login information. You must share the username and password to their account with them directly as well as instructions on how to update their information if needed.

If you would like to update the account information after creation or change any information on your own account, you can do so by clicking on the name in the list of accounts.

There are three different types of user roles within SIS:

**Power User**

These types of users have access to the entire system which means that they have access to all left menu tabs as well as all other features within the Student Information System. Additionally, they can update, create, or de-activate user accounts for the sites they have access to.

**Regular User**

Regular users are also able to access all left menu tabs and all features. However, they are only able to update their user account information, not including their permissions.

**Attendance User**

Attendance users have very limited access to the Student Information System. They are unable to view any participant data nor access the Upload Tool or run reports. These types of users have the ability update sponsor and site information, change activity details, take attendance, access the Help Center, and update their account information only.

**Please note:** When creating user accounts or updating user accounts, you should select 'Regular User' for both the Contract Management System and Service Management System sections. Only if the user should have the ability to create user accounts should you select 'Power User' for Service Management System permissions.

**Children's Defense Fund - Student Information System** [Logout](#)

**ADD USER**

**\* Indicates Required Field**

**Personal Information**

* Username	brianunderwood
* Password	.....
* Re-enter Password	.....
* Email	brianu@demo.nett
* First Name	Brian
* Last Name	Underwood
Title	Site Coordinator
Phone	000-555-2356
Fax	

**Contract Management System**

Power User	<input type="radio"/> full access to system; can manage user accounts
Regular User	<input checked="" type="radio"/> full access to system
No Access	<input type="radio"/>

**Service Management System**

Power User	<input type="radio"/> Full Access to System, User Accounts
Regular User	<input checked="" type="radio"/> Full Access to System
Attendance User	<input type="radio"/> Access to Services and Help Center only
No Access	<input type="radio"/>

### Assistance

If you encounter problems with the system, have questions or concerns regarding SIS, please give us a call at **1-866-GO-YOUTH** or **1-866-469-6884**.

For any questions or concerns regarding deadlines for data entry or custom report needs, please contact Erica Fields directly at [efields@childrensdefense.org](mailto:efields@childrensdefense.org). Additionally, you should reach out to Erica directly if you need access to more than one site.