STUDENT DATA: STUDENT LISTS

I.   Introduction to Student Lists

Genesis has a feature called Student Lists that allows you to create lists of students and then use those lists for various functions throughout the product.

What is a Student List?

A student list is just that: a named list of a specific set of students.

- You can create as many lists as you want.   There is no limit on the number of lists you can have.
- Lists can hold as many students as you need. There is no limit to the number of students on a list.
- You can sort your list in any one of six possible sorts:
    - Alphabetically by the students' last and first names.
    - By School and then alphabetically by student names
    - By School, grade level and then alphabetically by student names
    - By School, counselor's name and then alphabetically by student names
    - By School, counselor's name, grade-level and then alphabetically by student names
    - By School, homeroom and then alphabetically by student names
- You can share your lists with as many other Genesis users as you wish, either with full add/delete and share privileges, or with read-only privileges.
- If you have add/delete/share privileges for a student list, you will be able to add students to it, delete students from it and share it with other users.
- If you have read-only access to a list, you will only be able to delete your own access to it: you will not be able to add students to it, share it with other users or delete students from it.

Are Lists Automatically Updated?

Lists are never automatically updated. You *cannot*, for example, "create a list that always contains all 9th grade girls". You can only make a list of all the 9th grade girls that exist *right now*. In other words, the list is always a specific set of students: it is never a *query*.   If a new 9th grade girl enters the school, you must manually update any list that includes "all 9th grade girls".

How do I use Student Lists?

In many places in Genesis, there will be "Student List" drop down selector boxes. Wherever one of these Student List selector drop down boxes occur, you can use your student lists. For example, on the **Student Data→Student Search** screen you can use student lists to search for a named group of students.

II.   Creating Student Lists

Student List Screen

Figure 1 - The Student Data→Student List screen illustrating "Add to existing list" and "Create new list" controls

Create a Student List

Creating a new Student List is very, very easy.   At the bottom of the Student Data→Student List screen there are two "Student List" controls:

- The radio button on the left selects the "Add students to an existing list" control
- The radio button on the right selects the "Create a new list" control.

To create a new student list, do the following:
1. Search for the students you wish to begin the list with
2. Check the checkboxes to left of the students you want on the list
3. Click the "**Create new list**" radio button
4. Enter the name for the new list into the "**new list**" text box
5. Click the "**OK**" button to create the new list and put the checked students on it.

Once you have created a list, the name of the new list will automatically appear in every Student List drop down box while you are logged in to Genesis (it will not automatically appear for any other user unless you share the new list with specific other users).

Creating a List of Your Students

An Easy Way to Manage Your Students is to Create a Student List

Figure 2 - Student Data→Student List: Select your name from the counselor drop down list to select all your students

Creating a List of your Students – an Example for Guidance Counselors

You can use the student list facility to easily locate the students who are assigned to you. Once you have created a student list, that list appears everywhere there is a "Student Lists" drop down box.

Controls to create a new list or add students to existing lists appear at the bottom of the **Student Data→Student List** screen.

You can only add students to lists on this screen. If you must remove students from a list, it has to be done via the **Student Data→Edit Lists** screen.

There are two controls at the bottom on this Student Data→Student List screen:
- The control on the left is used to *add students* to an existing list.
- The control on the right is used to *create an entirely new list* and place students on it.

Step 2: Put All Located Students on a 'Current Year' Student List

Figure 3 - Student Data→Student List: If you are a counselor and you search on your own name, the search returns all of your students. Select them all and create a new Student List for them.

Creating a List of your Students

1. Go to the **Student Data→Student List** screen
2. Click the '**Reset**' button to clear any left over search criteria.
3. Use the '**Counselor**' drop down – select your name or of the name of the desired counselor
4. Click the '**Search**' button
5. When the search returns, click on the "**new list**" radio button at the bottom of the screen.
6. Click on the "**select all**" check box at the top of the left most column.
7. Make up a name for you list and enter it in the **list name** field.
8. Click **ok** to create the list.

This adds a new list to the "student lists" in the student list drop down box that appears on various screens – including this one.

III.   Using Student Lists
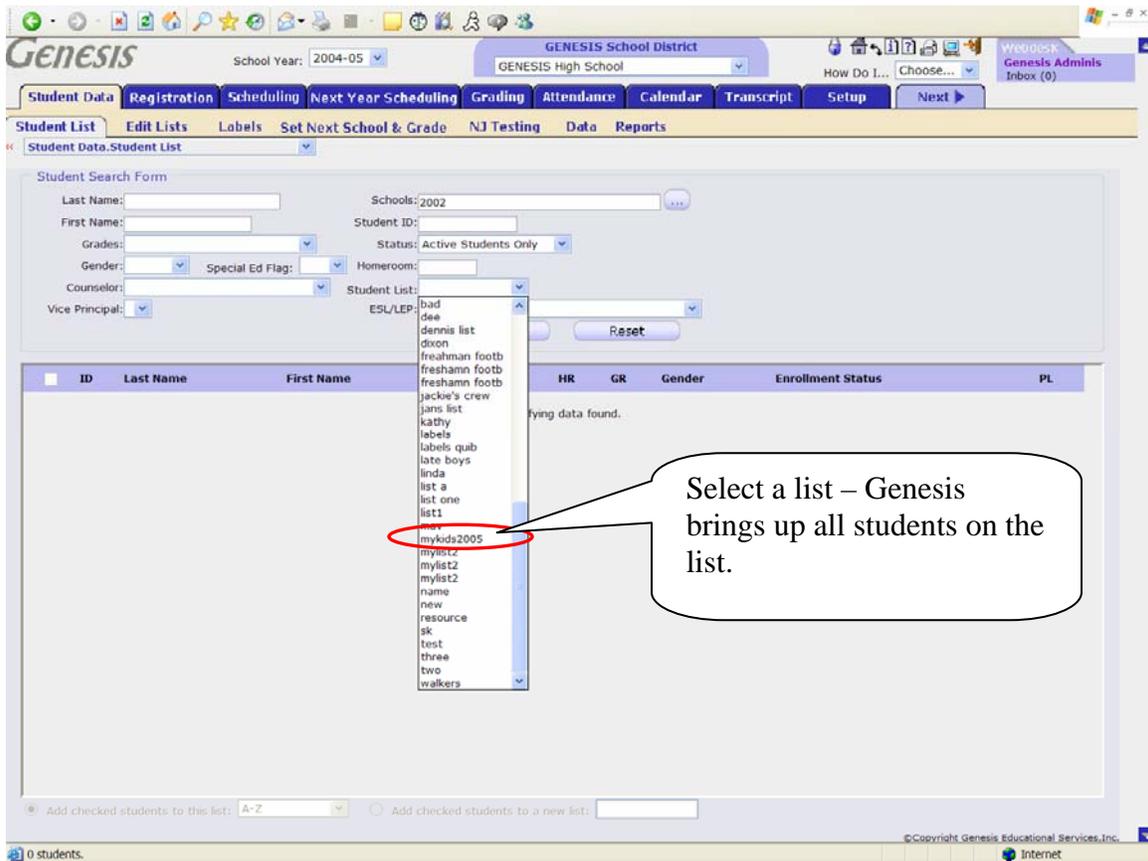
Figure 4 - Student Data→Student List: Student lists can be used to simplify search and select operations

Using your List(s)

Once you have created a list, you may use it anywhere you see a "Student List" drop down. The most frequent use will likely be on the **Student Data→Student List** screen to quickly bring up your own students

If you want to either *remove students from a list* or *delete an entire list,* go to the **Student Data→Edit Lists** screen. The "remove students" and "delete entire list" functions are available on that screen.

IV.   Adding Students to a List

Check the checkboxes of the students you are selecting.

Identify the list to which to add the selected students.

Click the '**Add checked students to the list**' radio button

Click '**OK**' to perform the operation
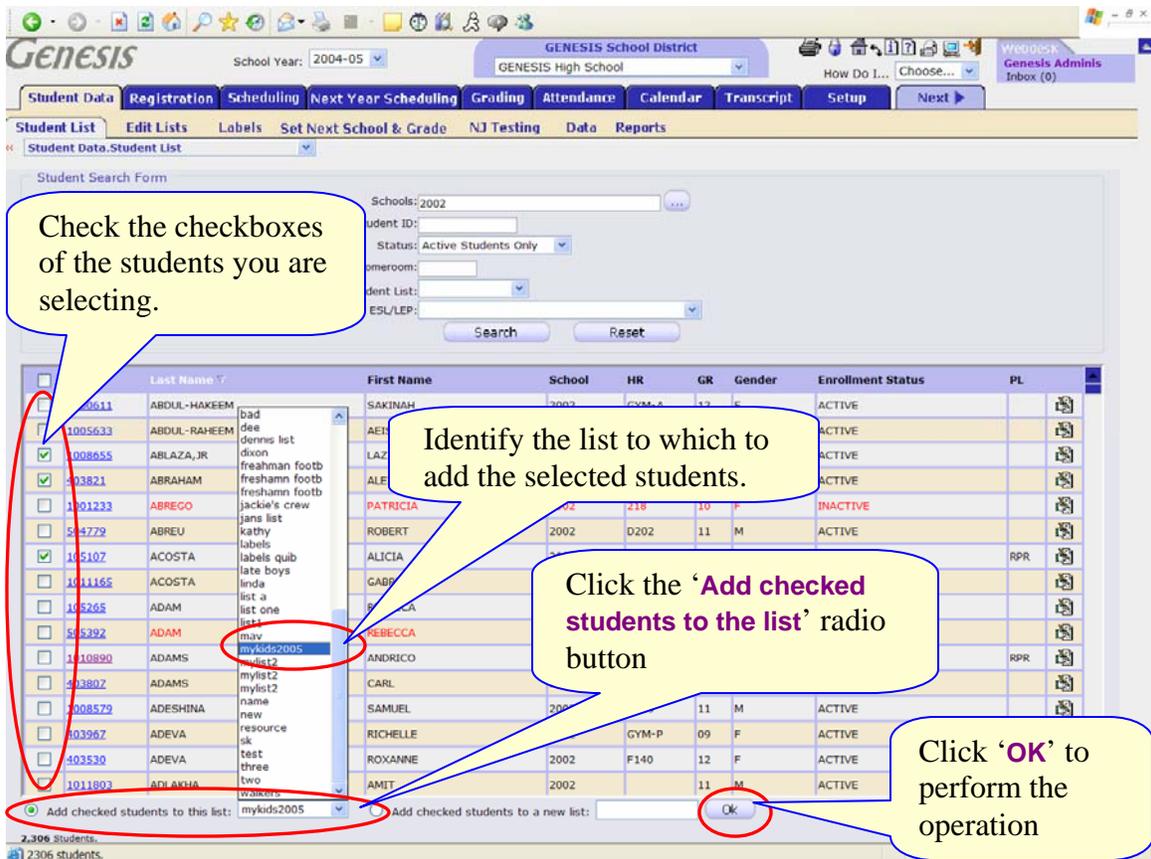
Figure 5 - Student Data→Student List: You can repeatedly and easily add students to any existing list.

Adding Students to an Existing List Students

1. Go to the **Student Data→Student List** screen
2. Click the '**Reset**' button to clear any left over search criteria.
3. Use the '**Counselor**' drop down – select your name or of the name of the desired counselor – or use any other criteria you wish.
4. Click the '**Search**' button
5. When the search returns, click on the "**Add to list**" radio button at the bottom of the screen (actually, this should be the default – but check).
6. Click the checkboxes next to those students you wish to add to the list.
7. Locate the name of the list you are adding to in the "**List Names**" drop down.
8. Click **OK** to add the checked students the list.

This adds students to an existing list. Now, every time you use the updated list, the students you just added will be included in the operation.

V.   The Edit List Screen
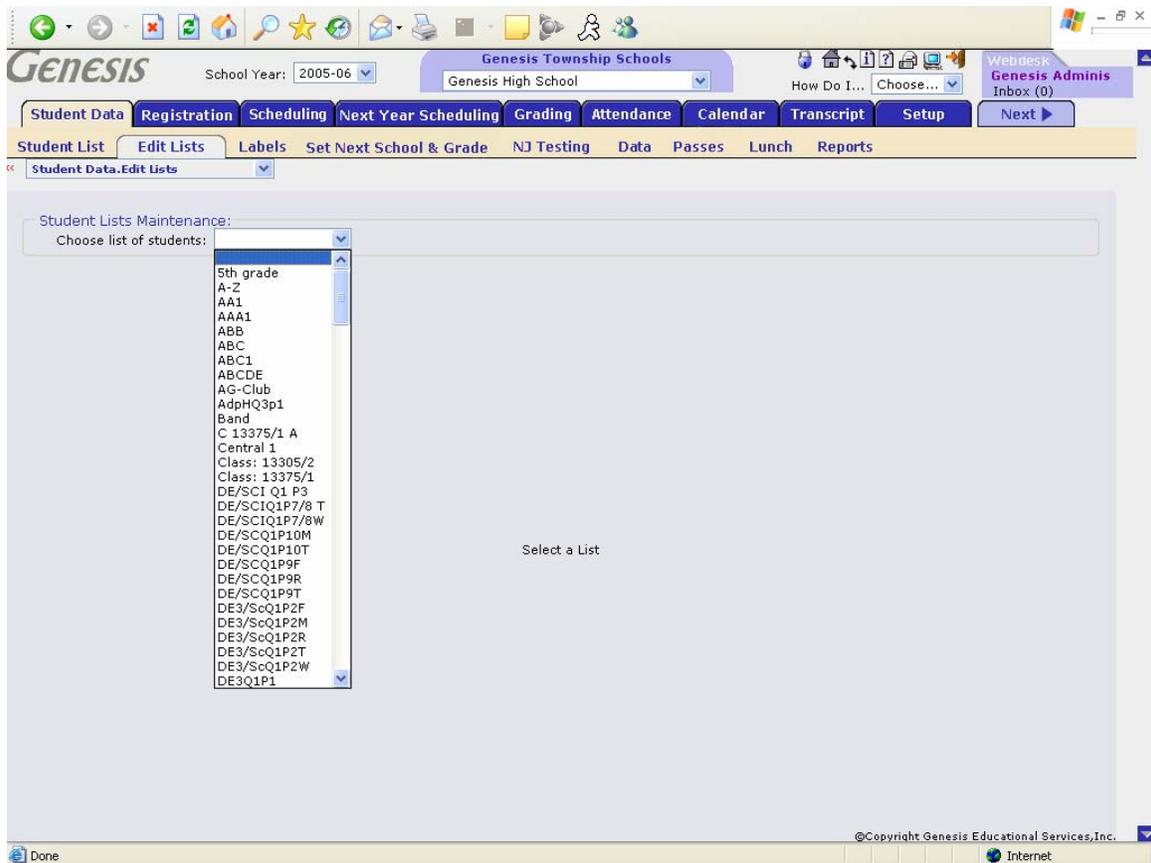
Figure 6 – Student Data→Edit Lists: To get to the actual Edit List screen, you must first select the list you wish to edit (or remove)

Choose the List you wish to Edit

Before you can edit a list, you must select the list you want to edit:

1. Click the "**Select List**" drop down list
2. Find the list you want to either edit or remove
3. Select that list

Once you have selected a list, you are taken to the full **Student Data→Edit Lists** screen. See next page below.

The Edit List Screen
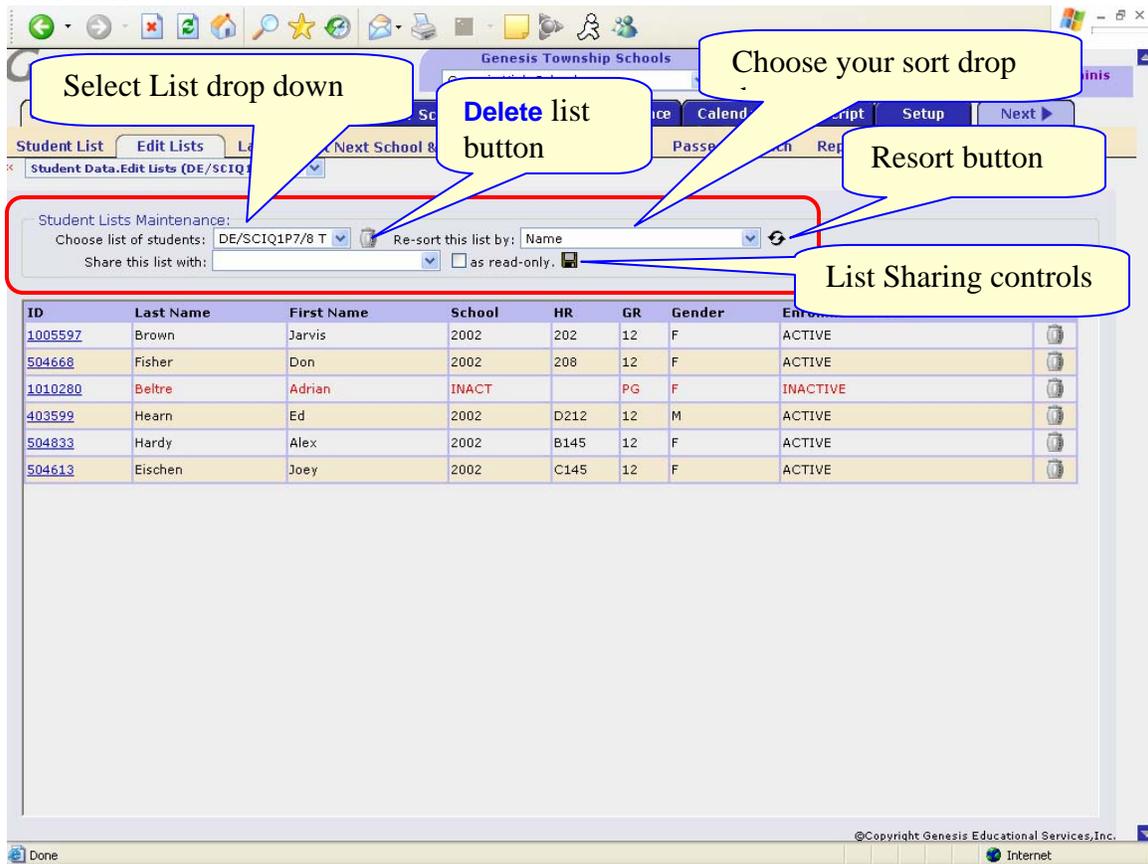
Figure 7 - Student Data→Edit Lists: Once the list is selected you can resort it, share it, remove students from it or remove the list itself, all from this one screen

The Edit List Screen

This screen allows you to do four functions:

1. Change the way the list is sorted
2. Share the list with other users
3. Remove the list itself
4. Remove students from the list

You can also change the selected list by clicking on the "Select List" drop down and choosing a new list.

VI.   Changing a List's Sort
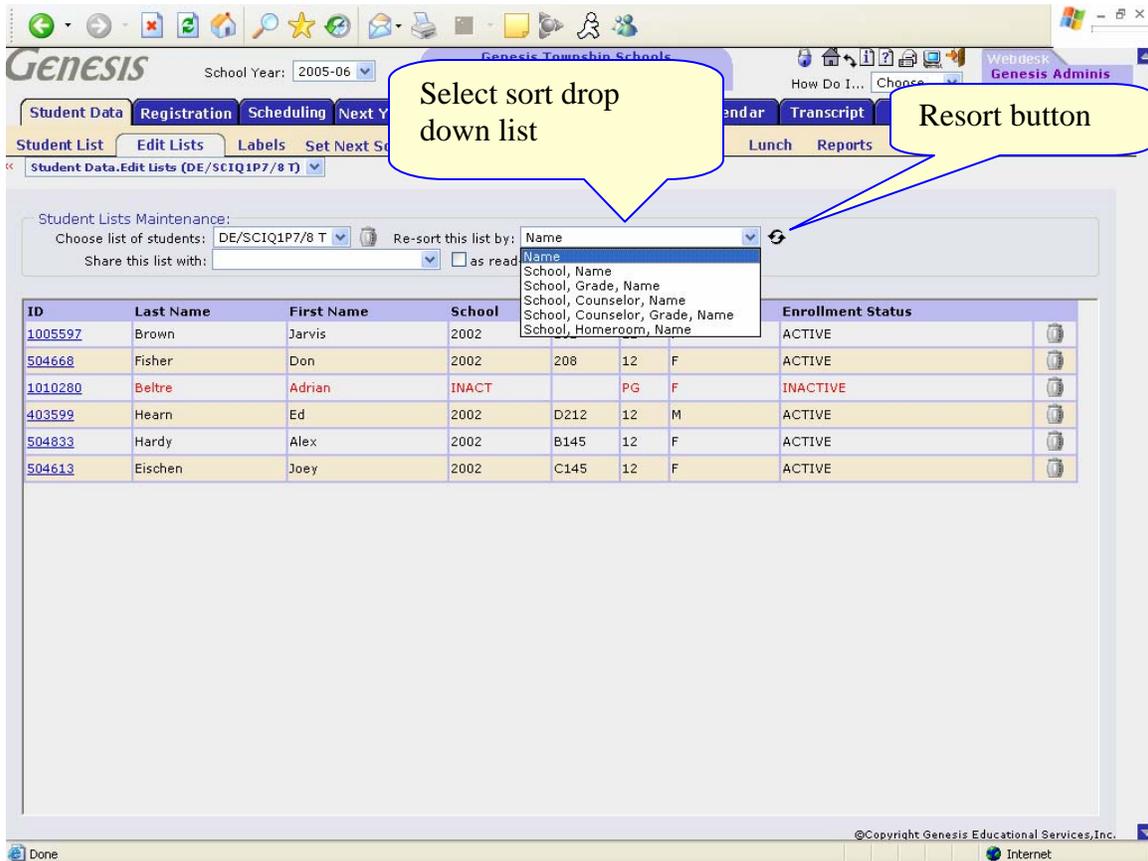
Figure 8 - Student Data→Edit Lists: Selecting the sort for a List

Sorting a Student List

Student Lists are automatically sorted alphabetically. That is, if you don't change the list's sort, the students will be listed alphabetically by their last and first names.

However, Genesis currently provides you with *six* different possible ways to sort a list. These six are:

1. Name – sort the list alphabetically by the students' last and first names. This is the default.
2. School, Name – Sort the list first by the school the students attend and then by their names. This is useful if you are sorting students across multiple schools in your district.
3. School, Grade, Name – Sort the list first by the school the students attend, then by their grade and then by their names.
4. School, Counselor, Name – Sort the list first by the school the students attend, then by their guidance counselors' names and then by their own names.
5. School, Counselor, Grade, Name– Sort the list first by the school the students attend, then by their guidance counselors' names, then by their grade levels and finally by their own names. This is a list designed for guidance counselors.

6. School, Homeroom, Name – Sort the list first by the school the students attend, then by their homerooms and then by their own names.

When you select an alternate sort for a list, that sort is used whenever the list is used. The sort is permanently associated with the list unless and until you select a different sort for it.

Resorting the List
To resort the list:

1. Click the "Select Sort" drop down and choose one of the six possible sorts.
2. Click the "**Re-sort**" icon button

VII.   Sharing a List
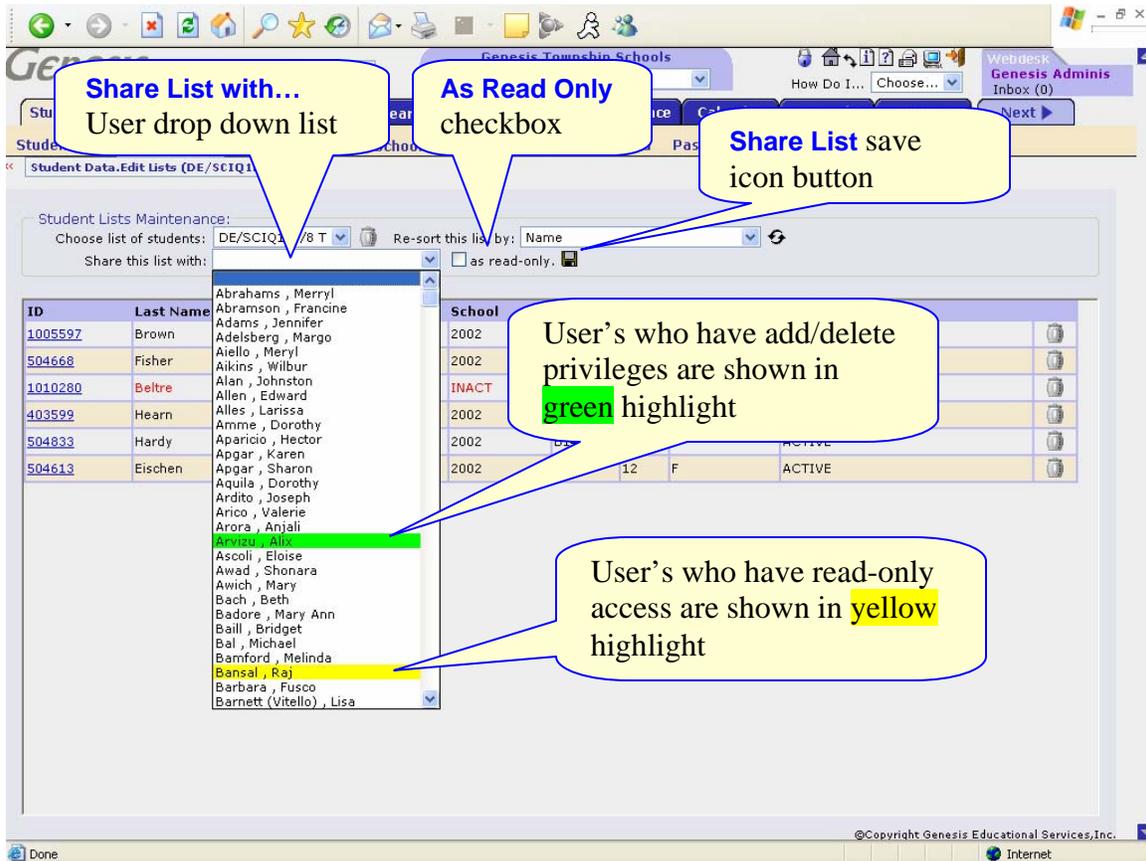
Figure 9 - **Student Data→Edit Lists:** **Sharing a List controls**

<u>Sharing a Student List</u>
Lists can be shared with an unlimited number of other Genesis users. Lists can be shared
in two ways: with full "add/delete/share" permission or only "read-only" permission.

<u>Who Can Share a List?</u>
Any user who has "add/delete/share" permission for a list – whether you are the actual
creator of the list or have yourself been given full add/delete/share access – can share the
list with other users. Users who have "read-only" access to a list cannot share the list
with other users.

<u>Unsharing a Student List</u>
Lists cannot by 'unshared'. Every user can delete their own access to a list – by doing a
normal "delete list" operation. But no user can remove *another user's* access to a list.
You cannot take sharing back: once you share the list, only the "receiving" user can
remove their own access to it.

Deleting a Shared List

Users can only delete their *own* access to a list: the list itself is not irretrievably deleted until the final user who has access to it deletes it.   Users who have "read-only" access to a list can still *delete their own access to the list itself;*   however they cannot remove students *from* the list nor can they share the list with other users.

Determining who has access to a List

To determine if a list is shared and to find out who has access to the list – and what kind of access – you must click the "users" drop down list and see if any user is highlighted:

- Users who are highlighted in <mark style="background:green">green</mark> have full add/delete/share access to the list.
- Users who are highlighted in <mark style="background:yellow">yellow</mark> have read-only access to the list
- Users who are not highlighted *do not* have access to the list

How do I know when someone shares a list with me?

You are not informed by Genesis when a list is shared with you. The list will "silently" appear in your list of shared lists. The other users who have access to it, including the person who created it, will be indicated by their highlighted names in the Users drop down list (as described above).

Procedure to Share a List with another User

1. Click on the "**Share List With**" drop down.
2. Select a user with whom to share the list
3. If you want to restrict the user to 'read-only' access, check the "**read-only**" checkbox
4. Click the "**Share**" save icon button to share the list.
5. Click the "**Share List With**" drop down list a second time to verify that the user has been granted appropriate access to the list. If the user is now highlighted in <mark style="background:green">green</mark>, they have full add/delete/share access to the list. If the user is now highlighted in <mark style="background:yellow">yellow</mark>, they have read-only access to the list

Removing Students from a List

Step 1: Select the List from which to Remove Students
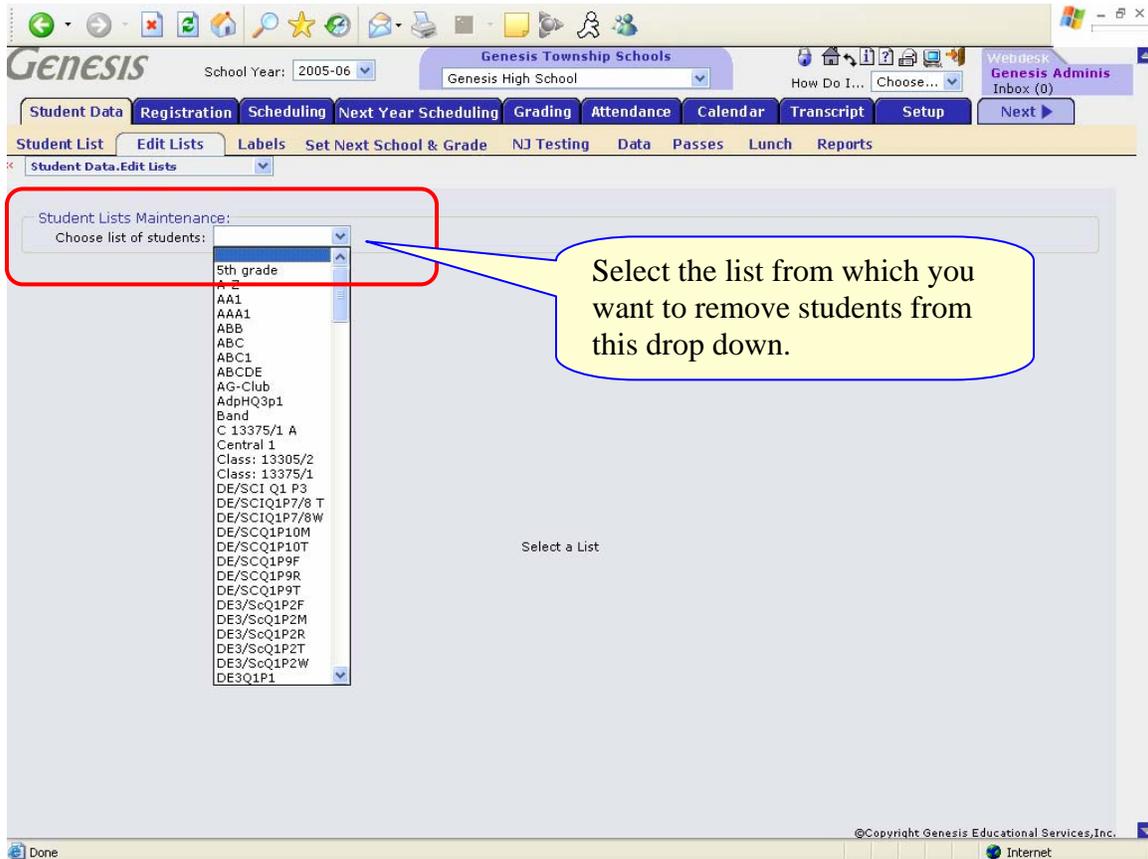
Student Data→Edit Lists

Figure 31 – Student Data→Edit Lists – Find a list to either remove students from it – or delete the list itself

Removing Students from a List

1. Go to the **Student Data→Edit Lists** screen
2. Select the list from which you wish to remove students from the drop down list.
3. Identify the students you wish to remove from the selected list.

This procedure remove students is simple: select the list, delete the students individually.

Step 2: Remove Students the List

Student Data→Edit Lists

Figure 31 – Student Data→Edit Lists – Find a list to either remove students from it – or delete the list itself

Removing Students from the Selected List

1. Identify a student you wish to remove from the selected list.
2. Click on the trashcan **Delete** icon button for that student

VIII. Remove a Student List

Step 1: Select the List from which to Remove Students
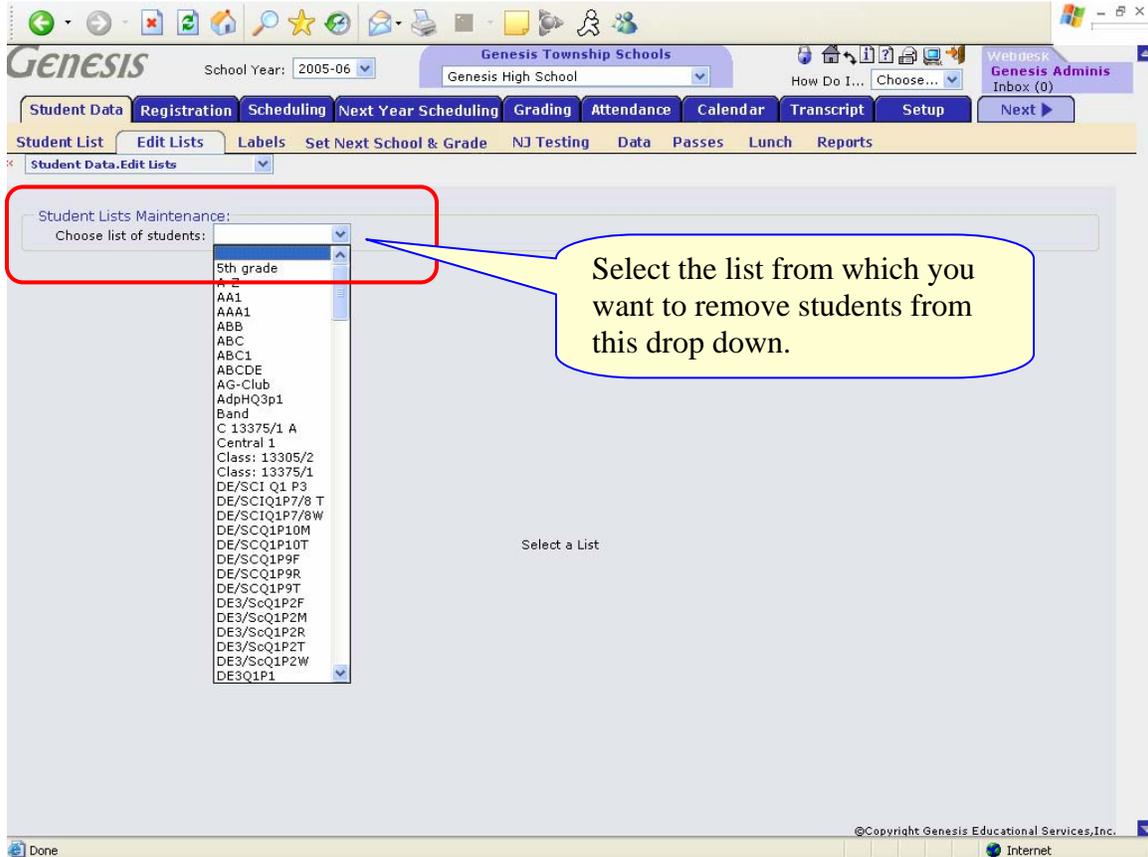
Student Data→Edit Lists

Removing a Student List

1. Go to the **Student Data→Edit Lists** screen
2. Select the list which you wish to remove from the drop down list
3. Click the "**Delete this list**" trashcan button

Step 2: Delete the Selected List

Student Data→Edit Lists

Figure 31 – Student Data→Edit Lists – Delete the list itself by clicking the trashcan icon button next to the lists name

Remove the List itself

1. Click on the trashcan **Delete** icon button for *the list itself.* This is a trashcan icon that appears next to the name of the list.

Removing a list is a "one click" operation.

IX. "Copying" a Student List

There is no one-click "Copy List" operation.   To copy a list, do the following:

Go to the Student Data→Student Search screen and do the following:
1. **Click the "Reset" button to clear any existing search criteria**
2. **Select the list you want to copy from the Student Lists drop down**
3. **Click the "Search" button to load the students on the list**
4. **Click the "Select all students" checkbox in the list's header bar**
5. **Click the "Create new list" radio button**
6. **Enter the name for the copy in the "New List Name" field**
7. **Click the "OK" button to create a new list (that is, the copy)**

Student Data→Student Search

Figure 10 - Student Data→Student List: Procedure to Copy a Student List