



Tips & Tricks in Aeries Client Conference 2015

Session Description: A look at some well-known and some not-so-well-known features and applications available in Aeries.

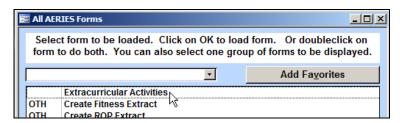
- 1. View All Forms / View All Reports
- 2. Aeries Variables for Current User
- 3. Change Form Colors
- 4. Use of Double Click
- 5. Turn On or Off Tab Stops
- 6. Click Field Headings to Edit Fields
- 7. Up/Down Arrows
- 8. Minimize or Layer Screens and Reports
- 9. Hot Keys
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- 11. Copy and Paste Records
- 12. Print List of Saved Queries
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View All Forms & View All Reports

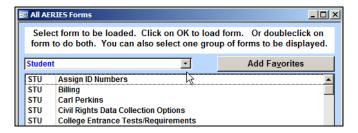
Accessible from the Control Panel and will display all Aeries Forms and Reports.



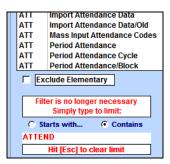
To select a form or report, double click on the form to be loaded or report to be generated.



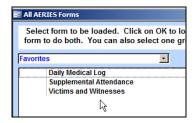
To sort a form or report by groups click on the **Group Type** at the top such as **Student** which will display only forms and reports for the group selected.



To **find** a form or report, start typing any part of the title. For example, type **Attend**, and only forms/reports that contain **Attend** will display. Click the mouse on **Starts with** before typing if you prefer to find a form or report using the starting letters of the title only.

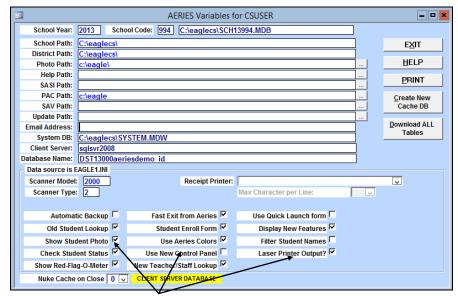


Click the mouse on **Exclude** (Elementary or Secondary) if you wish to narrow choices further. Press the **Escape** key to reset a search. Use the **Add Favorites** button to store favorite forms or reports in the Favorites group. Select the form or report, click on the title to highlight it, then click on **Add Favorites**. To see forms or reports previously saved as favorites, choose the Favorites group from the dropdown.



Aeries Variables for Current User

This form is accessible from **View All Forms** under group **OTH**. The **Aeries Variables for Current User** provides the User specific variables, such as, paths to the School Database, Student Pictures, District File, etc.

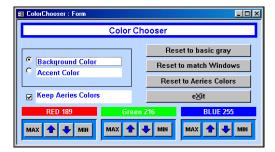


Each individual user can have **VARIABLES** in the **three** columns set to meet their needs and changed without affecting the data. Normally changes would not be made to entries in the top half of this form.

Form Colors

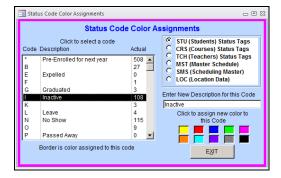
Color Chooser - Allows user to:

- Modify screen colors to your own choice
- Set to gray
- Use Windows color scheme
- Use Aeries' default colors (light blue background, medium blue accent)



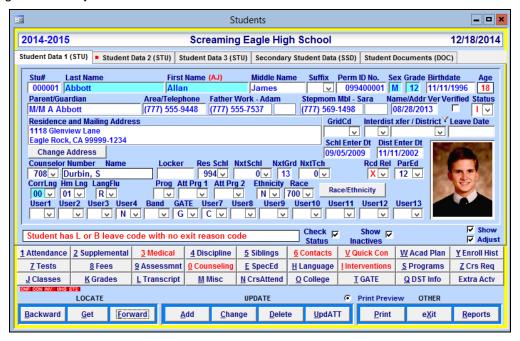
Status Code Color Assignment - Allows user to:

- Modify status code/border colors to own choice
- Change Status Tag Descriptions



Red Text in Fields:

- Warnings give attendance discrepancies
- Tag shows inactive student
- Age shows 18 years or older

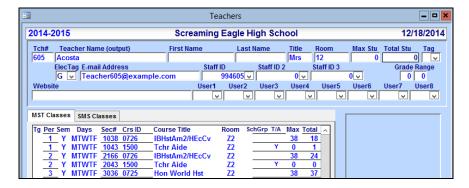


Define Required Fields - Turquoise Shading in Fields:

Indicates field has been setup as required and student cannot be added without data entered.

Loading forms or reports Using Double Click

Certain forms contain fields that can be **Double Clicked**, which will result in displaying another form. On the **Teachers** form double click the mouse on a section number. For example, section 1038.



The **Master Schedule** form will display for that section and teacher.



Other examples:

- Double click on a heading in View MST same as using GET.
- Double click on a name in View All Forms or View All Reports same as select then clicking the OK button.
- Double click on the name of a Saved Query same as select then clicking the OK button.

Turn On or Off Tab Stops

Click the mouse on certain headings to turn On or Off the tab stops. The color of the headings will change from a royal blue (**ON**) to a navy blue (**OFF**). When the tab is off the cursor will bypass the field.



Click Field Headings to Edit Field

On the Aeries forms click the headings of fields to highlight the entire contents of that field.

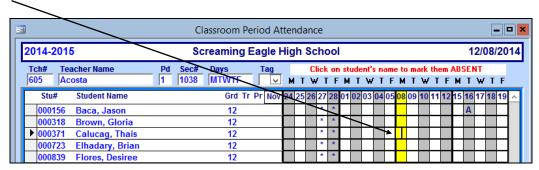


This is extremely helpful when you enter a field that has a **space** entered in the field. Data can be entered incorrectly with a space in front of the code.



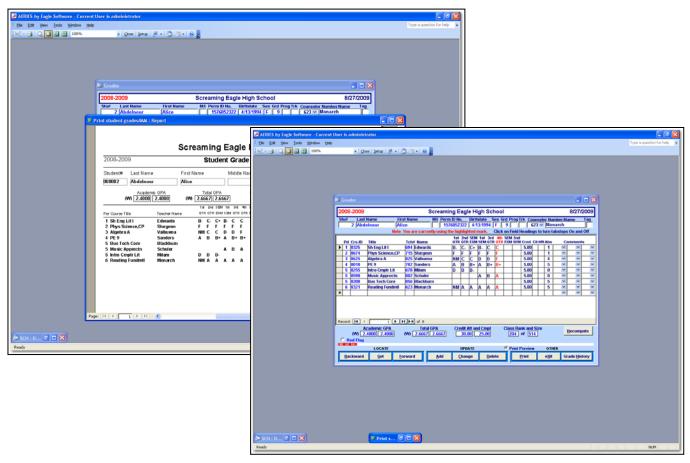
<u>UP/DOWN Arrows Function on Selected Screens</u>

The **cursor** can be moved left, right, up and down on various screens instead of hitting tab.

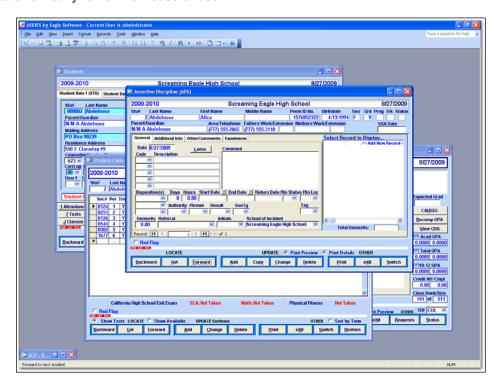


Minimize or Layer Screens and Reports

Minimize a report in order to open a new screen without having to rerun the report.



Opening multiple screens allows more information at the click of a button. Don't make it too busy or it will cause greater difficulty rather than ease of use.

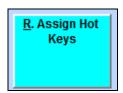


Hot Keys

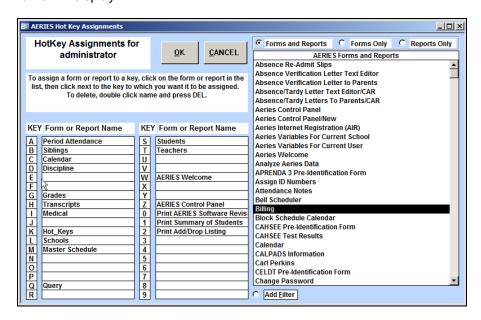
From the Control Panel click the mouse on the Other Functions button



Select Assign Hot Keys



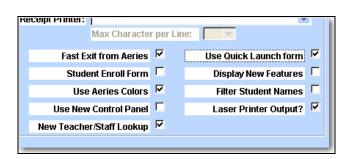
At the top right side options are available to display ALL **Forms and Reports**, **Forms Only** or **Reports Only**. The **Add Filter** will allow you to filter for specific forms or reports such as Attendance. To assign a form or report click the mouse on the Form or Report name, click next to the Key to be assigned. The report or form name will display.

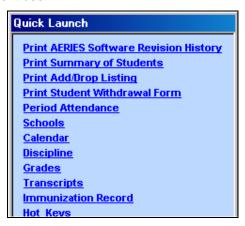


Please Note - Forms are listed first, then Reports, each in alphabetical order.

Quick Launch

Compare this to **Hot Keys** to find the Hot Keys selections that are the **Quick Launch Links**. The numbered selections are after alpha selections. **Quick Launch** can either be a Hot Key selection or setup to run automatically on startup via the Aeries Variables for current user.





Use the arrow keys on the keyboard to move left, right, up and down through screens



Copy and Paste Records

A record can be easily copied from one student to another on certain forms. For example, on the **Interventions** form a counselor might need to talk to a number of students in regards to **Credit Checks**. A record can be added for Credit Checks for one student and copied to another student spoken to for the exact same thing. Any one of the options below can be used to copy or cut and paste a record to another student.

Function	Right Click Menu	Access Menu	Keyboard
Cut	Cut	Edit Cut	Ctrl-X
Сору	Сору	Edit Copy	Ctrl-C
Paste	Paste	Edit Paste	Ctrl-V

To select the record to copy click the mouse on the gray box to the left of the information. Use one of the copy functions listed above. For example, right-click on the mouse and a selection box will display. Click the mouse on **Copy**.



Select the student that the record will be copied to and click on the record that displays the asterisk (*). Right-click the mouse on that record and the selection box will display.

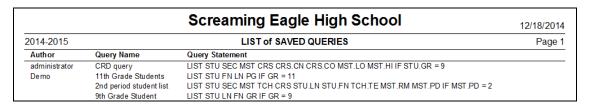


Click the mouse on **Paste** and the record will be added to the student selected.



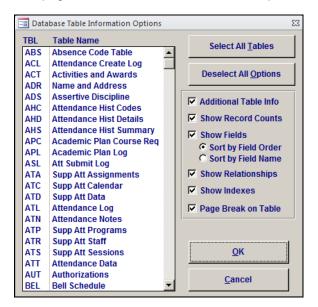
Print List of Saved Queries

From View All Reports select the OTH group. Select Print Saved Queries in order by alpha or Author.



Print Database Table Information

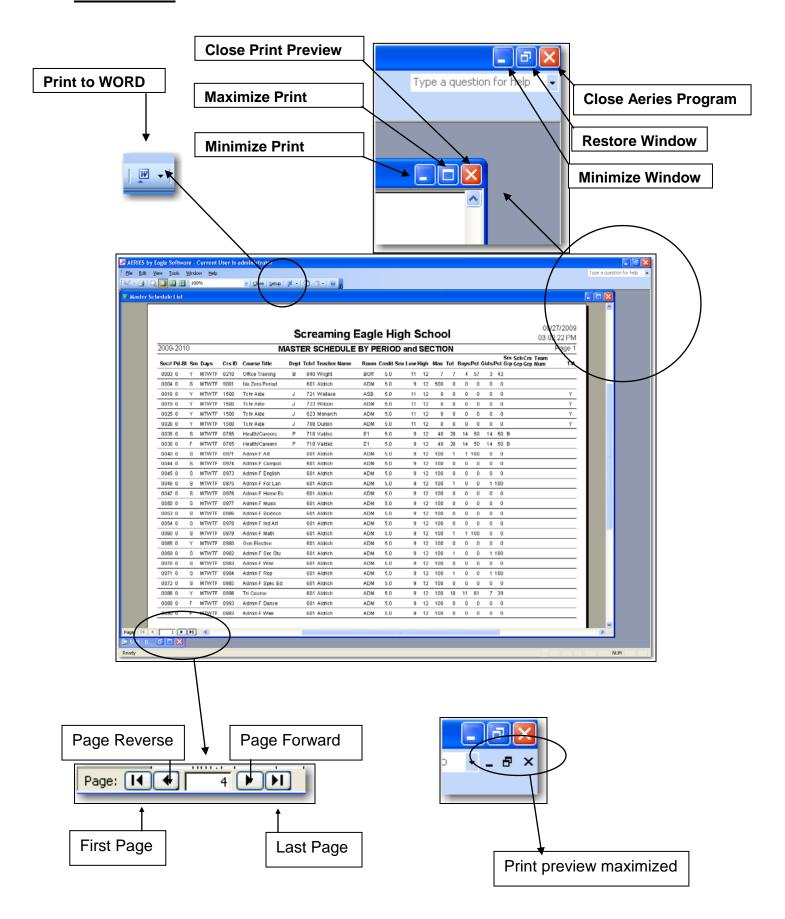
The **Print Database Table Information** report is accessed from **View All Reports** and the **OTH** group. This report will print one or more pages for each table selected and will print all fields within these tables.



After selecting the tables and options, click the mouse on the **OK** button and the report will generate. The Table name will display in the left hand corner and various table information will print.

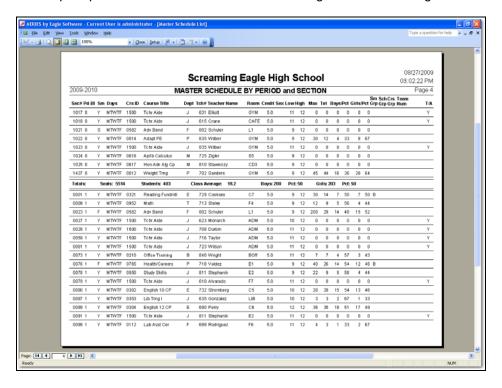
2014-2015		Database Table Information			12/18/2014	
able Code: ABS		able Name: Absence Code Table		Record	l Count:	17
Table D	escription				Data Type	District Managed
Codes	used for recording abs	sences			Setup	Y
Relationships		Field Name	Foreign T	able	Foreign	Field
	ABS	CD	ATT		AL	
Indexe	6	Index Type	Field			
	PRIMARYKEY	Primary	CD			
Field Code	Field Heading	Field Description		Type of Data		Maximum
CD	Absence code	Absence code		Text		1
TI	Title	Title		Text		10
AB	Abbreviation	Abbreviation		Text		3
TY	Type	Туре		Numeric		255
AD	ADA (Y/N)?	ADA?		Yes/No		1
LT	Letters (Y/N)?	Letters?		Yes/No		1
DI	Dialer (Y/N)?	Dialer?		Yes/No		1
OT	Other (Y/N)?	Other?		Yes/No		1
GR	Grades (Y/N)?	Grades?		Yes/No		1
SU	Susp (Y/N)?	Suspension?		Yes/No		1
PT	Partial Dy Truant (Y	/N)? Partial Day > 30 Minutes Truar	ıt?	Yes/No		1
DTS	DTS	DTS		Date		8

Print Preview

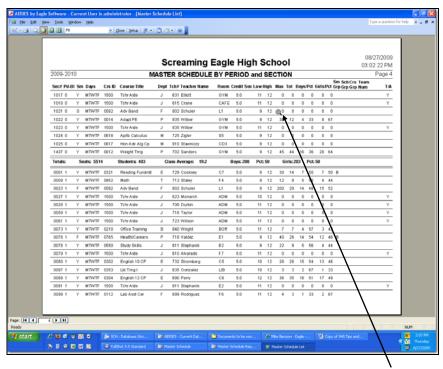


Tips & Tricks in Aeries Client

This is a maximized print preview. Notice the scroll bar on the right to allow viewing the rest of the page.



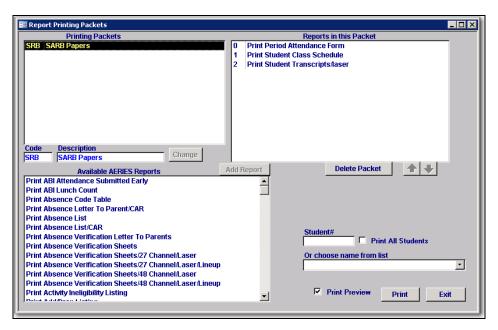
This screen is a zoom view of the report in preview mode.



To change the **Zoom View** of the report place the cursor on the report until the **symbol** displays and click the mouse.

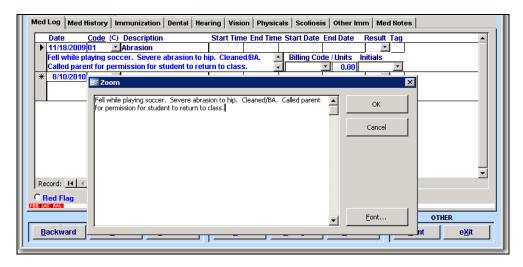
Report Printing Packets

The **Report Printing Packets** is an option from **View All Reports** that allows you to create a packet of specific reports to be printed all at one time.



Shift + F2

Zooms in on the memo field and displays a text box to view while entering information.



Filter/Sort Data by field in a form:

Right-Click the mouse in a field to display the pop up menu

- Filter by Selection hi-light the first name and will select all students with the first name
- Filter Excluding Selection hi-light the first name and will select all students that DO NOT have that first name.
- Sort Ascending will sort students in ascending order using the sorted field first.
- Sort Descending will list students in descending order using the sorted field first
- Filter for on the first name enter 'Alice' and only students with the first name of Alice will display

To **Remove the Filter/Sort**, right-Click the mouse in the field selected to sort by to display the pop up menu. Click the mouse on the **Remove Filter/Sort** option.





NOTE: Filtering on a field is the same as the SKIP/KEEP except you are not reminded to remove the Filter. YOU MUST click on "Remove Filter/Sort" to return data to its original state.

Documentation on web page

This website http://www.aeries.com allows all users to link to the FAQ, Videos, Queries, On-Line Help and Documentation files from the **Training & Support** drop down.



The Downloadable Documents page is available from the **Training & Support** tab and displays different areas for procedural documentation.

