

# STIPalm – Basics

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## First HotSync® Operation: Installing the Handheld Application

Immediately after running the installation on the local workstation, you must perform a HotSync® operation to install the STIPalm application on the handheld device.

- The first HotSync® operation is responsible for installing the STIPalm application even if an export has already been performed.
- It is good idea to perform the first HotSync® immediately after installing STIPalm, before performing any other operations such as exporting.

There are two important factors to consider when installing STIPalm:

1. The HotSync® will not transfer student data to the handheld device if the STIPalm application does not exist on the handheld device.
2. The STIPalm application is installed on the handheld device during the first HotSync® process.

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## Export Options

After performing the first HotSync® to install the STIPalm application to the handheld device, student data may be exported from STIOffice. In the STIOffice main menu, select **Utilities | STIPalm | Export**. Perform the following steps:

- Select Filter.
  - Filter: Select the filter of students to be included in the export.
  - Order: Select the order in which the students will appear in the STIPalm handheld application.
- Suspension, Expulsion, Detention
  - As the user clicks on each disposition individually, the status code in the *Type* column changes to one of the following. For each disposition to be exported to the handheld device, click on the disposition itself until the correct Type is assigned. The Type codes are represented as follows:
    1. I – In-School Suspension
    2. O – Out of School Suspension
    3. E – Expulsion
    4. D – Detention
    5. <blank> – None

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Note: Student discipline records with dispositions given as *None* <blank> status on this screen will not be exported. The status of the student in the export is relative to the value of the *Date* field located on the export window.

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- Filter Options
  - Include Withdrawn: If the QBE filter selected contains withdrawn students, these students (by default) will not be included in the export. Check this box to include the withdrawn students in the export
  - Memory Limit for Export: Use the spin box up and down arrows to choose an upper limit to the amount of memory that will be occupied on the handheld by the current export. If the amount of the export (memory) exceeds the available memory on the handheld device, the synchronization will result in a time-out and no data will be transferred.
- Calculate and Test Only: Check this box to test the export's memory requirement before an actual export occurs.
- Include
  - Schedule: Check this box to include student's course information (course description, room number, day code) for the current term in the export.
  - Guardian: Check this box to include student guardian information (guardian name, guardian phone number, emergency contacts 1 and 2, emergency contact phone numbers) in the export.
  - Attendance: Check this box to include the student's attendance information in the export. The attendance information reflects the particular date (and only that date) entered on the export window.
  - Date: Only includes the disposition and attendance status of a student in the export for the date entered.
  - Apply
    1. If *Calculate and Test Only* has been checked, this will calculate the required memory on the handheld to accommodate the export without exporting the students. The checkbox will be cleared immediately after the test, so that the **Apply** button may be pressed again once the memory limit has been verified, without the user having to choose the export options again.
    2. If *Calculate and Test Only* is not checked, this control will export the students without testing memory requirements.
  - Cancel: This button will close the export window.
- Append Exported Data: Check this box to export multiple STIOffice databases to one handheld device or to export for several filters within the same STIOffice database. Do not check the box for the first export, only for subsequent exports. If this option is not selected, the STIPalm database will be replaced by each export.

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## Users

In the STIOffice main menu, select **Utilities | STIPalm | Users** and perform the following steps:

- User Name List: Lists the current STIPalm users<sup>1</sup>.
- Edit: Allows an STIOffice user to insert, change or delete an STIPalm user (handheld device).
  - Insert: Click this button to add a new STIPalm user.
  - Change: Highlight an existing STIPalm user and click this button to change a particular value or setting related to the user.
  - Delete: Highlight a current STIPalm user and click this button to delete the user.
  - Cycle: Check this box for repetitive new user entry.
- Inserting a New User

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<sup>1</sup> The term *User* refers to the handheld device(s) that will synchronize STIPalm data.

- User Name: Enter the name value of the user you would like to add to the user list
- Active User: Check this box if the new user is an active user. Users (handhelds) may be made inactive, thereby disallowing those devices to synchronize STIPalm Data.
- View Palm Desktop Users Button
  - Palm Desktop User Name: List box that displays all currently defined Palm Desktop users on this workstation.
  - Copy All Marked to STIPalm: Press this button to add the highlighted (Palm Desktop) users as STIPalm users.
  - Import All as Active Users: If this box is not checked, the Palm Desktop users will be imported as STIPalm users but they will not be marked as active. The imported users will not be able to synchronize STIPalm data until they have been marked as active.

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## Second HotSync® Operation: Installing the Data, Forms and Tables

The second HotSync® operation is responsible for installing the forms and tables to the handheld application, along with any data that has been exported from within STIOffice.

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**Note:** The second HotSync® will require much more time to synchronize because the one-time operation of transferring the forms that comprise the STIPalm handheld application must be performed.

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## HotSync® Operation: Transferring Data to the Handheld Application

To keep the data on the handheld current, a HotSync® operation should be performed immediately after each export process is performed from within STIOffice, and an export should be performed at least once daily.

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## Handheld Side: STIPalm

After the second HotSync® has been performed, the student information is available on the handheld via the STIPalm application. To view student information in STIPalm, perform the following steps:

- Tap the **SSTS/Palm** icon on the Application Launcher to start the application.
- When the application starts, the current form is *List View* mode. The *Students* form may be selected here.

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**Note:** The *Students* form is the only form available at this point.

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- Tap the *Students* form, which will highlight the form, and then press **Review** at the bottom of the List View.
- The form (*List View*) containing all the students exported from STIOffice will appear. By default, the list of students is sorted in whatever order was specified during the export. The order may be changed if desired.

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## List View

- In the student List View, by default only one column displays the student name. Choose the down arrow with the label “default” in the top right corner of the form, which will display a list of fields to include along with the student name.
- Selecting a field in the drop-down list will display a second column that appears to the right of the student list. The list now displays not only the student names, but also the particular field that was selected in the drop-down list.
- To sort student records:
  - Tap the arrow next to the *Sort Field* to select a field by which to sort. The *Sort Field* drop-down box is located at the bottom of the form, immediately to the right of the order toggle switch, which is labeled *A>Z* or *Z>A*, depending on the current order.
  - To sort the records *descending*, tap the **A>Z** icon and the names will sort accordingly (tap the icon again to sort *ascending*).
- Filtering/ Searching: Allows the end user to display on those records that match specified search criteria entered by the end user.
  - Tap the arrow underneath the list of records and select the field that is to be used to filter the records when applying the filter.
  - On the dotted line, type the search criteria. The search criteria may be typed using either the on-screen keyboard or the Graffiti® handwriting feature.
  - Tap the search icon (magnifying glass) to perform the search and filter the records. Only the records that match the search criteria will be displayed.

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Note: The search will match any sequence of characters listed on the dotted line.

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- To clear the filter, select the **X** icon located to the right of the magnifying glass.

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## Record View

Once the desired student has been located in the list, the *Students* form switches to *Record View* and displays the demographic information specific to the selected student. If the field did not contain data in STIOffice, the field will not display in STIPalm Record View. Fields may be hidden by turning on the field numbers option. To do this, perform the following steps:

- Tap the *Menus* soft key located below the *Home* soft key on the handheld device. This will display the drop-down menu from the top of the screen.
- Select the *Options* menu.
- Choose the *Toggle Field Num* from the menu.

From this form (*Record View*), other sub-forms may be viewed, such as the *Guardian*, *Attendance* and *Course* information forms. If any one of the sub-form fields does not display for a student, the student has no relevance to the field.

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## Student Lookup Information

Following is a list of the fields available on the *Students* form while in *Record View*. Supplemental explanations for some items are included underneath the item and indented for clarity. Items marked with an asterisk (\*) will not appear if they are blank or empty for a specific student.

- Name
- Status\*: Possible values are:
  - Withdrawn
  - Expelled
  - Suspension (ISS)
  - Suspension (OSS)
  - Clear
- Withdrawal Date/Discipline Start Date\*:
  - If the Status is *Withdrawn*, this field represents the withdrawal date. If the Status is *Expelled*, this field represents the expulsion date. If the Status is *Suspension (XXX)*, this field represents the starting date of the suspension.
- Discipline End Date\*
  - If the Status is *Suspension (XXX)*, this field represents the ending date of the suspension, sometimes referred to as the *Return* date.
- Student Number
- Class Schedule Button\*
- Guardian Button\*
- Daily Attendance Button\*
- Address
  - Address and City
- Phone Number
  - Area Code and Phone Number
- Home Room Teacher
- Grade Level
- Ethnic Code
- Birth Date
- Social Security Number
- Lunch Code
- Buses\*: Arriving Bus / Departing Bus
- Locker & Combination\*
  - Appears as: Locker (Combination)
- Parking Permit/Decal Number\*
- Primary Language\*

- Characteristics
  - This field does not show any information while in Record View.
  - Tapping the field and switching to *Field View* will display a list box with the following five checkboxes:
    1. Special Education Student
    2. English As Second Language
    3. Limited English Proficiency
    4. Vocational Student
    5. Gifted Student

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## Schedule Form

If student schedules were included in the export from STIOffice, schedules for applicable students may be access via STIPalm. To view student schedules (*Courses*) along with other pertinent information, perform the following steps:

- Tap the *Courses* form from within the student Record View.
- Select the drop-down arrow located at the top right of the form to get a listing of the supplemental fields available. The supplemental fields available are listed below:
  - Period and Course Name
  - Student Number
  - Room Number and Day Code (Note: The *Day Code* appears enclosed in the parentheses and defaults to \*\*\* if none exist.)

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## Guardian Form

If student guardian information has been exported and if the current student has a guardian record, that student's guardian and emergency contact information may be accessed on the handheld. To view student guardians along with other pertinent information, perform the following steps:

- Tap the *Guardian* form from within the student Record View.
- To search for supplemental explanations related to the guardian information displayed, tap one of the following fields:
  - Student Number
  - Guardian: Name (Relation) Phone\*
  - Emergency Contact 1: Name (Relation) Phone\*
  - Emergency Contact 2: Name (Relation) Phone\*

\*For each of these fields, a question mark (?) will appear anywhere a field was not supplied. For example, a guardian record may look as follows:

*John Doe (?) 555-1212*, if the *Relation* field is empty; or  
*John Doe (?)?*, if both the *Relation* and *Guardian Phone* fields are empty.

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## Attendance Form

If student attendance information has been exported and the current student has an attendance record for the date specified during export, the student's attendance information for that day may be accessed on the handheld. To view student attendance information, perform the following steps:

- Tap the *Attendance* form within the student Record View.
- To search for supplemental explanations related to the attendance information displayed, tap one of the following fields:
  - Student Number
  - Type
    1. A=Allday
    2. H=Halfday
    3. T=Tardy
    4. O=Other
  - Attendance Code
  - Attendance Type
    1. E=Excused
    2. U=Unexcused