HeadMaster Administrative Tasks

2024

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Perform Initial Setup

For some organizations, a system administrator might perform the HeadMaster Installations. Once the installations are complete, the HeadMaster program must be set up and configured for all of the individuals in the organization who will use it. Setting up and configuring the program requires an individual with an administrator account.

The lists below outline the steps for getting started with HeadMaster. As an administrator, you can complete all the steps in the following order.

Before you install and begin setting up HeadMaster

- Verify that your computers meet the minimum requirements.
- View our installation recommendations.
- Select an installation method.
- Connect to the HeadMaster database.
- Log into HeadMaster for the first time.
- Set up users and user security.
- Customize program options and lists.
- Import and export data.
- Backup and restore data.

> Note: If you need to perform any of the above, take a look at our **Getting Started User Guide**.

> Tip: If your organization purchased HeadMaster Online, we recommend that you ensure HeadMaster properly uploads data to HeadMaster Online. Remember that once HeadMaster Desktop version data is uploaded to HeadMaster Online, relevant charges will apply. Please refer to the Online Guide for Administrative Staff to learn how to upload data such as grades, assignments, and financial information to HeadMaster Online.

Set Up Users and User Security

Create an Administrator Account

Once you connect to the HeadMaster Database and log into Headmaster for the first time, we recommend that you create an administrator account.

This account can access all areas of the program and is the only account that can create other user accounts.

1. On the Home screen, click **User Administration**.
2. Click **New** > **New User**.
3. Enter the username, password, and full name, then select the **Administrator** check box.
4. Click **Save**.

Add a New User

As an administrator, you can add new users to HeadMaster. When you add a new user, you can add them to a user group, or you can build a custom profile for them.

To add users

1. On the Home screen, click **User Administration**.
2. Click **New** > **New User**.
3. Enter the username, password, and full name.
4. Set security using one of the following methods.
    a. To grant the user full rights, select **Administrator**.
    b. To associate the user with a group of users, in the **User Group** list, select the group.
    c. To create a unique profile, in the **Profile** list, select the areas of the program you want to grant the user to have access.
5. Select lunch security settings for the user.
6. Select each database you want to grant the user access to.
7. Click **Save**.

> Useful Information: If you are using HeadMaster Pro with Classroom Manager, you do not have to enter your teachers as users. However, you must enter the teacher's username and password in the teacher record. The username and password allow them access to their students and classes.

Add a New User Group

As an administrator, you can add new user groups to HeadMaster. User groups are two or more users grouped together with common access levels within the program. For example, if an administrator wants to allow all secretaries access to the same areas of the program, the administrator enters a user group named "Secretary" and sets access levels for the group.

To add a new user group

1. On the Home Screen, click **User Administration**.
2. Click **New** > **New Group.**
3. Enter the group name and description.
4. In the Profile list, select the areas of the program you want to grant the group access to.
5. Select lunch security settings for your group.
6. Click **Save**.

Change a User's Password

As an administrator, you can change other user's passwords.

1. On the Home screen, click **User Administration**.
2. In the Users list, click the user's name.
3. Click **Edit** > **Change Password**. The Change Password dialog box displays.
4. Enter the password information and click **OK**.

Change a User's Permissions

As an administrator, you can change other user's permissions.

1. On the Home screen, **click User Administration**.
2. In the Users list, click the user's name.
3. Click **Edit**.
4. Click **Save**.

Useful Information: You can change the user permissions in three ways.

- Select the Administrator check box.
- Select a user group.
- Select access options in the Profile list.

Change a User's HeadMaster Online Username

As an administrator, you can change a user's HeadMaster Online username.

1. On the Home screen, click **Parents**, **Students**, or **Teachers**.
2. In the list, double-click the name of a record.
3. On the General tab, in the Login Information section, enter a username. Or, click **Get Random** to assign a random username generated by the program.
4. Click **OK**.

Change a User Group's Permissions

As an administrator, you can change a user group's permissions.

1. On the Home screen, click **User Administration**.
2. In the User Groups list, click the group's name.
3. Click **Edit** and select or clear the access options in the Profile list.
4. Click **Save**.

View Users Logged into the Program

As an administrator, you can view a list of users currently logged into the program.

1. Go the File menu.
2. Click **Show Active Users**.

> Note: **I**f a user has not logged our properly, their name will display. To remove them from the list, select the user and click **Remove**. To force users to log out of the program, see the section below.

Force Users to Log out of the Program

As an administrator, you can force users to log out of the program. This may be necessary when you have to run updates, install upgrades, or run utilities, such as backing up data.

1. On the File menu, click **Show Active Users**.
2. Select one or more users and click **Force Logout**.

> Useful Information: When the administrator clicks **Force Logout**, users who are currently logged in will receive a message alerting them that they have one minute to exit the program before they are completely

Mass Change Data

Replace Activities

You can replace one activity with another activity within multiple records all at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Activities**.
3. Click **Replace Activity**.
4. Make the appropriate selections.
5. Click **Change**.

Delete Teacher Assignments

You can delete assignments for a specific teacher or all teachers at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Assignments**.
3. Click **Teacher Assignments**.
4. Make the appropriate selections.
5. Click **Delete**.

Change Area Codes

With the rapid growth in the use of telecommunication devices, area codes frequently change and are added to service regions. As an administrator, you can perform a mass change to convert all the area codes in the system at the same time.

> Note: This process alters data. We recommend backing up your data before proceeding.

To change area codes

1. On the File menu, select **Mass Change**.
2. Double-click **Attributes**.
3. Click **Area Codes**.
4. Enter the old area code and the new area code.
5. Click **Change**.

Change Phone Numbers

If you have the same phone number entered in multiple records, as an administrator, you can use Mass Change to locate the phone number and update it with a new number.

1. On the File menu, select **Mass Change**.
2. Double-click **Attributes**.
3. Click **Phone Numbers**.
4. Enter the old phone number and the new phone number.
5. Click **Change**.

Change Online Status for Students

You can change the online status for multiple student records all at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Students**.
3. Click **Online Status**.
4. Make the appropriate selections.
5. Click **Update**.

Delete Behaviors

You can delete behaviors within multiple records all at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Students**.
3. Click **Behaviors**.
4. Make the appropriate selections.
5. Click **Delete**.

Change Homeroom Teachers

You can change homeroom teachers within multiple records all at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Students**.
3. Click **Homeroom Teacher**.
4. Make the appropriate selections.
5. Click **Change**.

Change Graduation Dates

You can change the graduation date within multiple records all at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Students**.
3. Click **Graduation Date**.
4. Make the appropriate selections.
5. Click **Change**.

Delete Correspondence Log Entries

You can delete Correspondence Log entries within multiple records all at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Individual**.
3. Click **Correspondence Log**.
4. Make the appropriate selections.
5. Click **Delete**.

Change the Status of Individual Types

You can change the status of individual types within multiple records all at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Individual**.
3. Click **Individual Types**.
4. Make the appropriate selections.
5. Click **Change**.

Activate Grading Periods

You can activate grading periods within multiple class records all at once.

1. On the File menu, select **Mass Change**.
2. Double-click **Setup**.
3. Click **Grading Period**.
4. Make the appropriate selections.
5. Click **Update**.

Change Term Dates

You can change term dates within multiple permanent records all at once.

1. On the File menu, select **Mass Change.**
2. Double-click **Permanent Records**.
3. Click **Term Dates**.
4. Make the appropriate selections.
5. Click **Change**.

Change Programs of Study

You can change programs of study within multiple records all at once.

1. On the File menu, select **Mass Change.**
2. Double-click **Permanent Records**.
3. Click **Program of Study**.
4. Make the appropriate selections.
5. Click **Change**.

Fill Blank Grade Averages

If permanent records are converted or transfer classes are brought in with blank grade averages, but they have been assigned a letter grade and/or a GPA, as an administrator, you can fill in the grade averages.

1. On the File menu, select **Mass Change**.
2. Double-click **Permanent Records**.
3. Click **Fill Blank Averages**.
4. Make the appropriate selections.
5. Click **Update**.

Constant Contact

Add a Constant Contact Account

Constant Contact® provides email marketing and online survey tools. It offers real-time response tracking and email management features to ensure that you don't send emails to people who've opted not to receive them.
With a Constant Contact account, you can manage email lists created in HeadMaster. You can send HTML-based emails formatted with a custom template or simple plain-text emails.

> Useful Information: To manage your Constant Contact account in HeadMaster, you must submit a request directly to Constant Contact. To do this, call Constant Contact support at 1-866-289-2101 or 1-800221-2701. You'll need to provide your Constant Contact username and password.

Once you receive approval to manage your Constant Contact account in HeadMaster, you can add your account in HeadMaster.

1. On the Tools menu, select **Constant Contact**.
2. Click **Manage**.
3. Click **Add**.
4. In the Account Name field, enter an account name to identify this Constant Contact account within HeadMaster.
5. Enter your Constant Contact username and password.
6. Click **OK**.

Create a Constant Contact Email List

As an administrator, once you've added your Constant Contact® account to HeadMaster, you can create new Constant Contact email lists. You can create a list by manually locating individuals by type or by loading individuals from saved search results.

To create a constant contact email list

1. In the Tools menu, select **Constant Contact**.
2. Click **New List**.
3. Click **View Type** and select the record type you want to view.
4. To add an individual to the email list, select the name within the list and click **Add**. You can add individuals from various record types. Repeat steps 3 and 4 until you are satisfied with your email list.
5. Enter a name for the email list and click **Upload**.

Import and Export Data

Use Advanced Export

As an administrator, you can customize and extract larger amounts of data specifically for your reporting or information needs with the Advanced Export Utility. You can also save frequently used exports in this utility so that they can be easily run repeatedly.

Advanced Export is available only with HeadMaster Pro and the OnDemand School package, and it contains categories of information or data sets composed of various fields that can be exported. If you are using a third-party Scheduler program, extra options are available.

Advanced Export allows you to:

- Easily transmit selected data to disconnected HeadMaster users (such as a laptop user).
- Export fields to other file formats, enabling you to create reports such as call lists, immunization records, or emergency pickup lists. Supported programs and file formats include Microsoft® Excel, Microsoft® Access, comma separated text file, tab delimited text file, or an XML file for viewing in a Web browser.
- Customize the sorting of fields and records prior to exporting data.

The Advanced Export window displays lists of saved exports. From this window, an administrator can create, edit, delete, or process data from the HeadMaster program.

> Useful Information: If you access HeadMaster through OnDemand, click the HM Advance Export icon to use the Advanced Export.

To access Advanced Export, on the Windows Start menu, click **All Programs** > **HeadMaster** > **Advanced Export**. Select the data set from which you want to export the information.

Useful Information: Once you start Advanced Export, you can press **F1** on your keyboard to view Help.

1. On the toolbar, click **Customize**.
2. The **Customize Export Grid** dialog box opens and displays column names that don't currently appear in the grid.
3. To add columns, click a column heading name on the **Customize Export Grid** menu. Drag and drop the name to the column heading row. You can click and drag column heading names to rearrange them.
4. To remove a column heading, click the column heading name and drag it to the **Customize Export Grid** menu.
5. On the toolbar, click **New**.
6. In the Categories menu, click to select an export category.
7. To customize the contents of the data you plan to export, select the **Include the Deactivated Records** check box or select a saved search from the User Search drop-down list.
8. Click **Next** .
9. In the HeadMaster Fields menu, click the plus sign (+) next to an item to display more choices. To add field names to the Selected Fields window, double-click the field names.
10. To rearrange the order of the fields you selected, click 

 or 

.
11. Click **Next** .
12. To select a field to sort by, double-click a field name in the **Available Fields** menu. You may select multiple fields. The records will sort in the order the fields are listed.
13. Click **Next**.
14. Enter a title and description, and click **Finish** .
15. Highlight the export you want to process.

16. Click **Process**. Each record that will be exported can be viewed in the Export Data window. To filter records, select a field name and click **Filter by Selection** . To remove the filter, click **Clear Filter** .
17. On the toolbar, click the **Export** drop-down list and select **As CSV** to create a comma-separated text file; select **As Tab Delimited** to create a tab-separated text file; or select **As Fixed Length**.
18. In the **Save As** window, navigate to the drive and folder where you want to save the file.
19. Enter a name for the file.
20. Click **Save**.
21. Highlight the name of the saved export.
22. Click **Edit**.
23. Edit the categories, fields, sort order, title, or description.
24. Click **Finish**.
25. Highlight the name of the saved export.
26. Click **Delete**.
27. Click **OK**.

The following categories are included in Advanced Export:

- Class
- Courses
- Immunization
- Individuals
- Pickup
- Prospective Students
- Staff Emergency
- Student Custom Fields
- Student Emergency
- Students
- Teacher Emergency
- Teachers
- FCS Control*
- FCS Courses*
- FCS Requests*
- FCS Student*
- FCS Teacher*

*These options are available only with the FCS scheduler program.

Import Data from ACS People

If you are an ACS People user, as an administrator, you can import multiple records from ACS People into HeadMaster. With this option, you can decrease manual data entry time by using basic information that already exists in People. For more information about ACS People, visit our website.

1. On the File menu, click **Import > Import from ACS**.
2. To designate an age range for children in the families to display, select only families with children between the ages of the check box. Select the low and high end of the age range.

   Note: The program defaults to families with children ages 5 - 18.

3. Click **Set Filters**.
4. To select People records, click the check box beside each name you want to import.

   Useful Information: Optionally, to view specific information that will be imported, double-click **Parent Information** or **Child Information** to expand the view. To close the view, double-click the header again.

5. Click **Import**.

   Useful Information: To locate a specific family in the Import ACS window, enter a name in **Search Family Name for**.

Import Data from Full Control Scheduler (FCS)

As an administrator, if you recently exported data from HeadMaster into FCS for the purpose of processing course requests, it's time to import the schedules into HeadMaster. If you have an FCS license on your computer, you can use HeadMaster's Import Utility to import data into HeadMaster.

Before you can begin this process, the HMServer.exe must be stopped. On the server base computer, right-click on the HeadMaster Server icon and click **Stop**. After you finish the process, right-click on the icon again and click **Start**.

1. Open the Utility Manager.
    a. ***Windows 7 and Windows Vista***: On your Windows desktop, click the Start button in lower-left corner of the screen. The Start menu displays. Click **All Programs** > **HeadMaster** > **Utility Manager**. Log in with your username and password and click **OK**. The Database Utilities window displays.
    b. ***Windows 8.1***: On the Windows desktop, click the Start Button in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the HeadMaster section, click **Utility Manager**. Log in with your username and password, then click **OK**. The Database Utilities window displays.
    c. ***Windows 10***: On the Windows desktop, click the Start button in the lower-left corner of the screen. The Start menu displays. Scroll to the HeadMaster section and click **Utility Manager**. Log in with your username and password, then click **OK**. The Database Utilities window displays.
2. Click **Import Schedule**. The Database Utilities dialog box displays.
3. In the data set list, select the data set to import the FCS displays.
4. Select the directory that contains the FCS data. This is normally the FCS32 folder.
5. Click **Next**.
6. When scheduling is complete, click **OK**.
7. Click **Exit**.

Import from Classroom Manager (Administrator)

When teachers use Classroom Manager on laptops that are disconnected from the network, the school administrator, secretary or teacher must import data back into HeadMaster in order to update the school data set.

1. On the File menu, click **Import** > **Import from Classroom Manager**.
2. Click **Browse**.
3. Select the location of the file to import and click **Open**.
4. Click **Import**.

Refresh Imported People

You can refresh people imported from ACS. On the File menu, click **Refresh Imported People** to display the most recent data from the ACS People module.

If any names can't be found in ACS, the Information window will display with a list of the names.

Import Pictures

There are two options available for importing pictures to student records.

Option 1 – You can import pictures from a specific folder location with file names that correspond with each ID number per record in the program.

> For example: you have all student pictures in a folder called Yearbook Pictures and Nelly Nancy's ID is 10002 making her picture file 10002.jpg.

Option 2 – If you have pictures with specific names created by you or the photographer, you can create a .csv file in Microsoft® Excel ®where Column 1 has the individual's ID number and Column 2 has picture file name. This .csv file can be imported along with the picture's files from a specific location to attach the pictures to their corresponding individual records.

> Note: The recommended picture size is **Standard size is 800 x 600**. We also recommend no larger than 600 pixels.

To import pictures

1. On the File menu, click **Import** > **Import Pictures**. The Picture Import dialog box displays.
2. Select **Option 1** or **Option 2b**.
3. Select the image directory you want to import. If you selected Option 2, also select the CSV file.
4. Click **Import**.

Import Online Payments

Once you set up online payments, you'll be able to import the payments into HeadMaster. When you import the payments into HeadMaster, each payment will be applied to the oldest invoice.

To import online payments into HeadMaster

1. On the File menu, select **HM Online**.
2. Select **Import Payments**.
3. Select the payments you want to import.
4. Click **Post Selected**.

This imports all of the online payments to the family records.

Back Up and Restore Data

Archive Datasets

As an administrator, you can archive older data sets so that they cannot be accessed by users in other parts of the program.

The data sets you archive will no longer appear in the Dataset drop-down menu within the HeadMaster login dialog box. They will also be hidden in a number of administrative applications and processes such as Advanced Export, HeadMaster Import, Table Maintenance, Import Schedule, Promote, Rename Database, and Delete Attendance.

To archive datasets

1. In your local HMaster directory, double-click the **HMUtils.exe** file.
2. Enter your username and password and click **OK**. The Database Utilities window displays.
3. Click **Archive Dataset**.
4. Click the data set name.
5. Click **Deactivate**.
6. Repeat for each data set you want to archive. Click **Activate** to make archived data sets visible again.
7. Click **Close**.

Back Up HeadMaster Data

As an administrator, you can use the Backup utility to perform routine system backups. Before backing up and restoring data, you must stop the HMServer.exe service.

To back up and restore your data

1. On your server, locate the HM Server icon in the System Tray.
2. Right-click on the icon, then click **Stop**.
3. In your local HMaster directory, double-click the **HMUtils.exe** file.
4. Enter your username and password, then click **OK**. The Database Utilities window displays.
5. Click **Create Backup**.
6. To select the location where you want to save your backup, click **Browse**.
7. To omit picture files, select **Omit Picture Files**.
8. Click **Backup**.
9. After the HeadMaster data is backed up, click **OK**.
10. In your local HMaster directory, double-click the **HMUtils.exe** file.
11. Enter your username and password, then click **OK**. The Database Utilities window displays.
12. Click **Restore Backup**.
13. To select the location where you want to restore, click **Browse**.
14. Click **Next**.
15. Click **Finish** to restore the selected backup.
16. After the HeadMaster data is restored, click **Close**.

> Note: Do not restore data from a version older than the one you are currently using.

Copy a Term

As an administrator, you can copy all data from the old term into the new term.

Note: Before you can begin this process, the HMServer.exe must be stopped. On the server base computer, right-click on the HeadMaster Server icon and click **Stop**. After you finish the process, right-click on the icon again and click **Start**.

To copy a term

1. In your local HMaster directory, double-click the **HMUtils.exe** file.
2. Enter your username and password, then click **OK**. The Database Utilities window displays.
3. Click **Copy Term**.
4. Select the name of the database that you want to copy a term to and click **Next.**
5. Select the database that you are copying from and click **Next**.
6. Click **Finish**.
7. When the process is complete, click **OK**.

Create a New Database

As an administrator, at the beginning of a new school year, or as organizational changes are made, you may find it necessary to create a new, empty database.

Note:

- Prior to creating a new database, all users must exit HeadMaster.
- Before you can begin this process, the HMServer.exe must be stopped. On the server base computer, right-click on the HeadMaster Server icon and click **Stop**. After you finish the process, right-click on the icon again and click **Start**.

To create a new database

1. In your local HMaster directory, double-click the **HMUtils.exe** file.
2. Enter your username and password, then click **OK**. The Database Utilities window displays.
3. Click **Create Database**, then enter a name for the new database.
4. Click **Next** > **Finish**.
5. The next time you log into HeadMaster, select the new database name in the Dataset list.
6. When the process is complete, click **OK**.

Delete a Database

As an administrator, you can delete a database.

Note:

- Before you can begin this process, the HMServer.exe must be stopped. On the server base computer, right-click on the HeadMaster Server icon and click **Stop**. After you finish the process, right-click on the icon again and click **Start**.
- This process alters data. We recommend backing up your data before proceeding.

To delete a database

1. In your local HMaster directory, double-click the **HMUtils.exe** file.
2. Enter your username and password, then click **OK**. The Database Utilities window displays.
3. Click **Delete Database**.
4. Select the name of the database you want to delete and click **Next**.
5. Click **Delete Database**.
6. To proceed, click **Yes**.
7. When the process is complete, click **OK**.

Rename a Database

As an administrator, you can use the Rename Database utility to change the name of an existing database. Database names are limited to eight characters.

Note:

- Before you can begin this process, the HMServer.exe must be stopped. On the server base computer, right-click on the HeadMaster Server icon and click **Stop**. After you finish the process, right-click on the icon again and click **Start**.
- This process alters data. We recommend backing up your data before proceeding.

To rename a database

1. In your local HMaster directory, double-click the **HMUtils.exe** file.
2. Enter your username and password, then click **OK**. The Database Utilities window displays.
3. Click **Rename Database**.
4. Select the name of the database that you want to rename and click **Next**.
5. Enter the new name and click **Next**.
6. Click **Finish**.
7. When the process is complete, click **OK**.

Set Security for a Report

As an administrator, you can set up security for a report.

1. On the Home screen, click **Reports**.
2. Right-click on a report and click **Set Security**.
3. Select a security option and click **Add**.
4. Click **Save**.

Schedule HeadMaster Online Uploads in HeadMaster Desktop

In order to save time through the convenience of automated tasks, you can set up scheduled HeadMaster Online uploads in the HeadMaster desktop. This must be set up on your server, and HeadMaster must be installed locally on the C: drive of your workstation.

Note: If you plan to make the automated upload into a scheduled task, we recommend that you set your automated upload settings first. Navigate to **Tools** > **Options** > **Scheduled Tasks**. In the drop-down list, select a data set. Then, select if you want to import lunch preorders.

To set up a scheduled upload to HeadMaster Online in Microsoft Windows

1. Log in to HeadMaster and click **Tools** > **Options** > **Scheduled Tasks**.
2. Select a data set.
3. Click **Close** and exit HeadMaster.
4. In Microsoft Windows, open the Control Panel.
5. In the Control Panel, click **Administrative Tools**. This step is for the "Classic View" in the Control Panel.
6. Double-click **Task Scheduler**.
7. On the main menu, click **Action** > **Create Task**.
8. On the General tab, enter a name for the task and make the other selections you want.
9. On the Triggers tab, click **New**. Select On a schedule in the drop-down list, make the other selections you want, and click **OK**.
10. On the Actions tab, click **New**. Click **Browse**, navigate to your local HMaster directory, select **HMUtils.exe**, and click **Open**.
11. In the Add arguments data field, type **UPLOAD** and click **OK**.
12. On the Conditions and Settings tabs, make the other selection you want.
13. Click **OK**.

Useful Information: Headmaster OnDemand users can also schedule uploads. To learn how to schedule HeadMaster online uploads in OnDemand check out our Online Guide for Administrative Staff.

View Statistics About Your HeadMaster Data

The Statistics tab is a customizable, statistics-at-a-glance feature where you can readily track the information that most interests you. The Statistics tab contains a list of predefined information categories from which you can select.

> Useful Information: The Statistics tab is viewable only to administrators and regular users with the Report View permission.

To customize the statistics, you want to view

1. On the Home screen, click the **Statistics** tab located at the bottom of the screen.
2. Select an information category from the Options list and click **Add**. Your selection displays in the right box.

   > Note: you can select a maximum of four information categories to view simultaneously.

3. Select an option for how to display the information as well as a color.

   > Note: The Pie Chart and Bar Graph views both display the number of records. The Grid view displays the number of records and a percentage.

4. You can view your information and click **Print** if you want.

Post School Announcements

Administrators can publish school announcements. Enter the announcements in HeadMaster, then upload them to HeadMaster Online (the HMOnline option in the File menu) so parents and students can view them when they log in.

To post school announcements

1. On the Home screen, click Announcements.
2. Click New. The Announcement dialog box displays.
3. Enter the Title, such as “Candy Sales End Tomorrow!”
4. Enter a Publish Date. This is the first day you want the announcement to be available online.
5. Enter an Expiration Date. This is the last day you want the announcement to be available online.
6. If applicable, select Public.
7. If the announcement is limited to a single grade or class, select the appropriate **Class**. if the announcement should display for the whole school, leave the default **<None>**.
8. If there is a website for more announcement details, enter the full address in the **Web Link** field.
9. Enter any notes you want in the Notes field.
10. Click **OK**.

Useful Information: If an announcement is public, people can view it outside of HeadMaster Online. You can display public announcements using the link found in **Web Links** when logged into HeadMaster Online as an administrator.

Post Events

You can publish events to HeadMaster Online and group them by categories so that students and parents can filter events on the calendar and view what is of interest to them.

Prior to adding events, you must set up event categories. Once these categories are set up, you can enter events and post them to HeadMaster Online.

> Note: If applicable, select **Public**. If an event is public, people can view it outside of HeadMaster Online. You can display public events using the link found in **Web Links** when logged into HeadMaster Online as an administrator.

To add a new event

1. On the Home screen, click **Define List**. The Define List dialog box displays.
2. In the Available Fields list, expand Events and click **Categories**.
3. Click **Add**. The New Event Category dialog box displays.
4. Enter the category name, such as Athletics, Fund raisers, Lower School, etc.
5. Click **OK**.
6. On the Home screen, click **Events**.
7. On the toolbar, click **New**. The Add Event dialog box displays.
8. Enter the general information about the event and the primary contact information.
9. Click **OK**.

The next time you publish to HeadMaster Online, events with dates between the current date and 14 days out will be visible to students and parents.

View Today's Attendance and the Students and Teachers Currently Checked In

As an administrator, you can view a list of the teachers who have posted school attendance for the day as well as a count of teachers and students who are currently checked in. Teachers and staff can add and view information on the calendar too. To view this information, on the Home screen, click the **Calendar** tab.

Set Class Period Times

You can add, edit, or delete the period structures used for each class.

1. On the Home screen, click **Options**.
2. In the options list, click **Period Setup**.
3. Click **Add**. The Add New Period dialog box displays.
4. Enter the period information.
5. Repeat steps 3-4 for each period.
6. Click **OK**.

Track Changes of Individual Records

You can keep track of changes, such as deletions and grades, to individual records.

1. On the File menu, click **Change Log**. The Change Log dialog box displays.
2. Select the **Use Date Range** check box and enter a date range.
3. Click **OK**.

Useful Information: As changes are made during the selected date range, they will display in each of the tabs.

