



CalSWEC

California Social Work Education Center

# Layouts and Scripts In CSIS

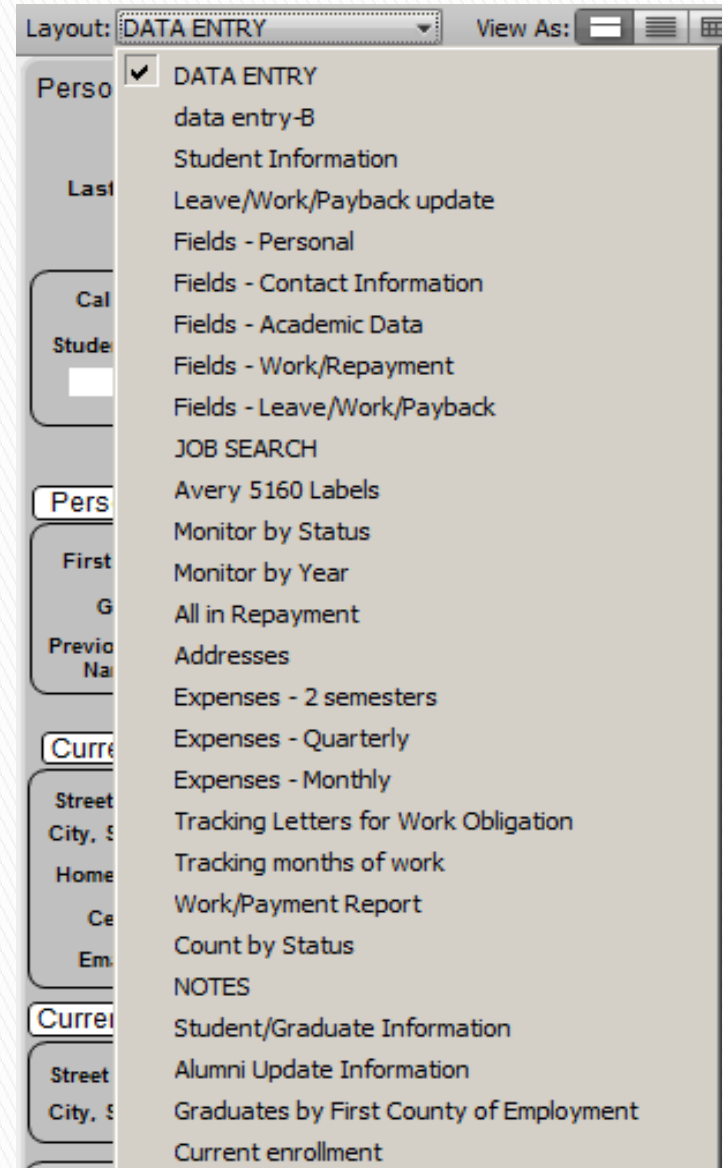
# Data in the Tutorial

- ▶ All data are fictitious
  - Identifying information has been altered
- ▶ FileMaker is very Interactive
  - FileMaker saves continuously
  - Entries are saved automatically
- ▶ FileMaker often wants to upgrade.
  - **DO NOT DO IT!**
  - FileMaker 11 is not compatible with FileMaker 12.

# Layout Menu

The layouts used in CSIS are listed in a menu below the Notebook. To display the menu of layouts or to switch to a different layout, click on the arrow to the right of the layout label below the notebook. New layouts can be created as needed. There are now 27 MSW layouts

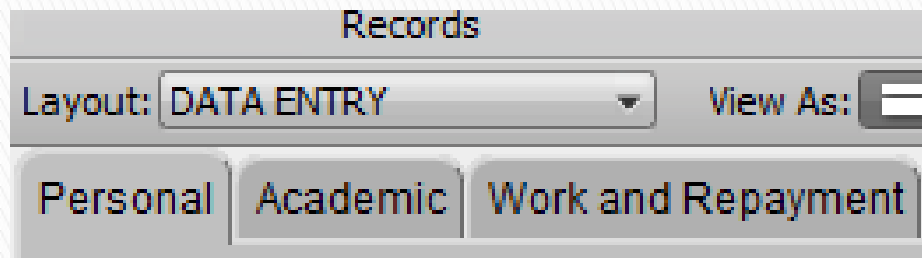
The Layout checked is the **DATA ENTRY** layout, which contains all the information that is required for CSIS.



# Layouts in CSIS

**DATA ENTRY** – is a 3-tabbed layout with three Tabs:

- Personal Tab
- Academic Tab
- Work and Repayment Tab



The screenshot shows a software interface for 'Records'. At the top, the word 'Records' is centered in a grey bar. Below this, there is a 'Layout:' label followed by a dropdown menu currently displaying 'DATA ENTRY'. To the right of the dropdown is a 'View As:' label and a button with a horizontal line icon. At the bottom, there are three tabs: 'Personal', 'Academic', and 'Work and Repayment'. The 'Academic' tab is currently selected and highlighted with a darker background.

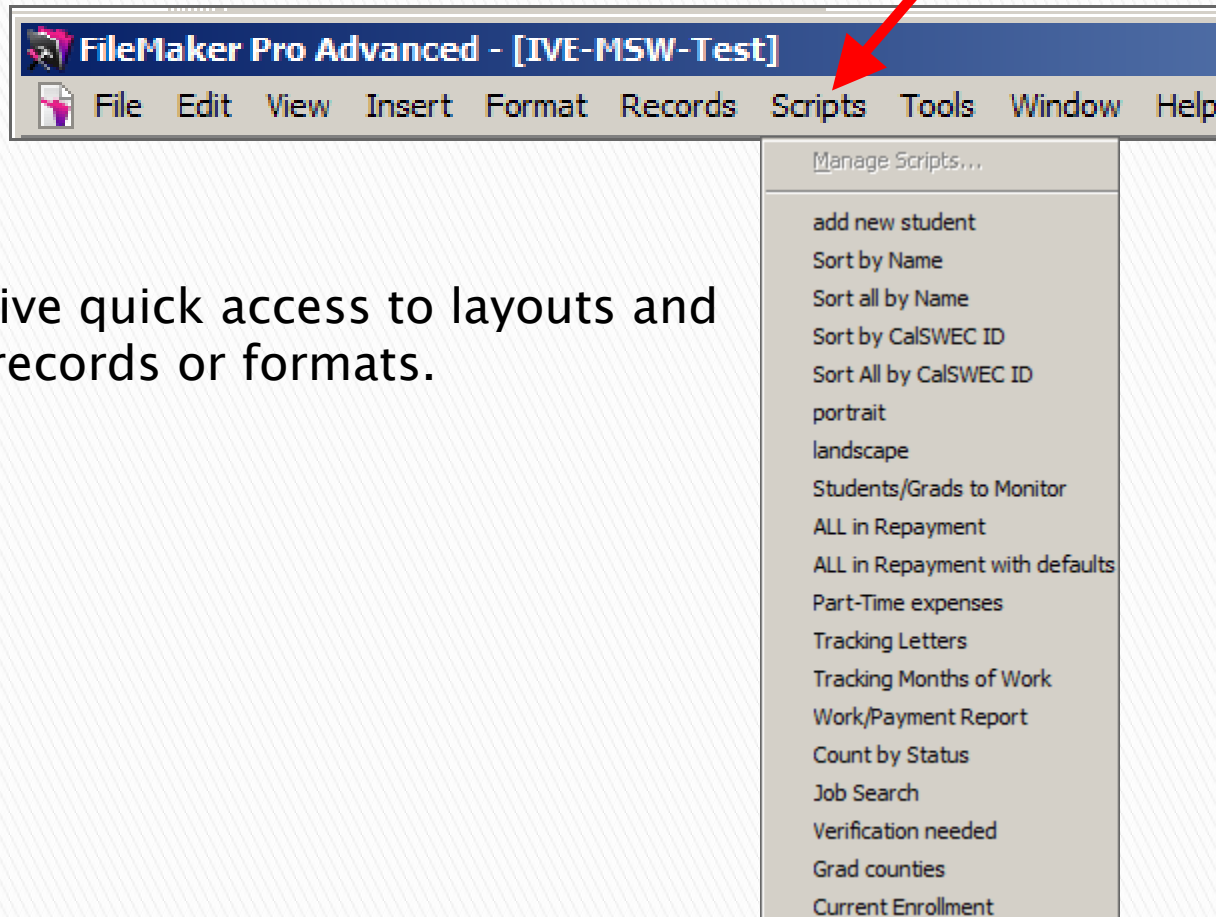
# Other Layouts

- ▶ **Student Information** – contains all the information that only the student can provide.
- ▶ **Leave/Work/Payback update** – condensed version of the “Data Entry” layout with data pertaining to Leave, Termination, Employment, Repayment, and Notes.
- ▶ **Fields – Personal** – Table format that contains fields from the Personal Tab except contact information.
- ▶ **Fields – Contact information** – Table format that contains all the contact fields
- ▶ **Fields – Academic Data** – Table format that contains fields from the Academic data layout.
- ▶ **Fields – Work/Repayment** – Table format that contains fields
- ▶ **Fields – Leave/Work/Payback** – Table format that contains fields from Leave/Work/Payback layout.
- ▶ **JOB SEARCH** – new job search layout to be used from now on
- ▶ **Avery 5160 Labels** –this layout generates address labels.
- ▶ **Monitor by Status** – a report that lists all “Check work Status” and “Monitor” students and graduates. The layout includes: “Name” and “County Employee status” sorted by DONE Status.
- ▶ **Monitor by Year** – similar to the report above but by Year of Entry in CalSWEC.
- ▶ **All in Repayment** a report of students to be monitored along with Repayment status and monies owed.
- ▶ **Addresses** – a report of the contact info for students/grads.

## Other Layouts (cont'd)

- ▶ **Expenses – 2 semesters** – an optional layout for use in entry of specific expenses and calculates totals for part-time students on the 2-semester system.
- ▶ **Expenses – quarterly** – an optional layout for use in entry of specific expenses and calculates totals for part-time students on the quarter system.
- ▶ **Expenses – monthly** – an optional layout for use in entry of specific expenses and calculates totals for part-time students on a monthly basis.
- ▶ **Tracking Letters for Work Obligation** – Track letters sent to and received from Graduates.
- ▶ **Tracking months of work** – Report of the months due and completed for each working graduate.
- ▶ **Work/Payment Report** – a report of the current standing of all students and graduates by their “DONE” field status and the numbers of students and graduates in each category.
- ▶ **Count by Status** – a report of the number of students and grads by their status.
- ▶ **NOTES** – a report by student of entry and grad year, status, and NOTES section.
- ▶ **Student/Grad Information** – Student/Grad contact info, work or repayment info, and notes.
- ▶ **Alumni Update Information** – Layout used for tracking alumni information.
- ▶ **Grads by first county of employment** – Lists the graduates by their first county of employment and year of graduation.
- ▶ **Current Enrollment**– Layout of currently enrolled students by Full-Part-time status and year of graduation. For use with invoice reconciliation.

# Scripts Menu



Scripts give quick access to layouts and specific records or formats.

# SCRIPTS

- ▶ **Add new student** – Adds a new record, and generates the next ID, school, and other default values. Use this method or the **GREEN** “Add New Student” button for correctly adding a record.
- ▶ **Sort by Name** – Sorts the records showing by last name.
- ▶ **Sort all by Name** – Selects all records and sorts them by last name.
- ▶ **Sort by CalSWEC ID** – Sorts the records the records showing by CalSWEC ID.
- ▶ **Sort All by CalSWEC ID** – Selects all records and sorts them by CalSWEC ID.
- ▶ **Portrait** – Changes page orientation to portrait.
- ▶ **Landscape** – Changes page orientation to landscape.
- ▶ **Students/Grads to Monitor** – Selects students & grads in repayment and grads working or done who need verification.
- ▶ **All in Repayment** –Selects all students and graduates that have are or were in repayment status, sorts by name, and then opens the “All in Repayment” layout.
- ▶ **All in Repayment with defaults** – Similar to “All in repayment” but includes those who defaulted.
- ▶ **Part-Time expenses** – Selects the part-time students and opens the “Expenses 2 semester” layout in browse mode. Change to Expenses quarterly or monthly layouts if needed.



# SCRIPTS (cont'd)

- ▶ **Tracking Letters** – Selects all records with “Working” status, sorts by name, and opens “Tracking Letters for Work Obligation” layout.
- ▶ **Tracking Months of Work** – Selects grads with “Check Work Status” or “Working” status, sorts by name, and opens “Tracking months of work” layout in Preview mode.
- ▶ **Work/Payback Report** – Selects all records in repayment or in work status except those who are DONE with work or repayment, sorts by Current Status and name, and opens the Work/Payment Report layout.
- ▶ **Count by Status** – Lists the number of records by Current Status.
- ▶ **Job Search** – Selects grads searching for work and opens Job Search layout
- ▶ **Verification needed** – Selects working grads whose work status includes “verification” and brings up Student/Graduate Information layout.
- ▶ **Grad Counties** – Selects Graduates “working” or “Done with work” and brings up Graduates by First County of Employment layout.
- ▶ **Current Enrollment** – Selects only currently enrolled students & brings up “Current enrollment” layout. It is used for Inventory Check.

# Contact information

Data Management Specialist – Susan Jacquet

[sjacquet@berkeley.edu](mailto:sjacquet@berkeley.edu)

510-643-9846

Database Specialist – Afton Hencky

[aftonh@berkeley.edu](mailto:aftonh@berkeley.edu)

510-643-0207

