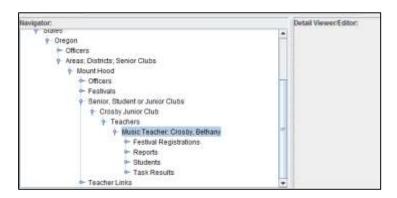# How to Add a New Student to your Studio
(including Transferring a Student into your Club)

Note: NFMC has instructions for this in their online user's guide—and you may find them more helpful—but it lacks the important details I have in Step # 3 here.

1. When you get into the online program, the "tree" on the left will look like this:

2. Right-click on "Students" below your name and choose "Create Student Relationship"

The Detail Viewer/Editor will be populated with a (mostly) blank form looking like this:

3. All you need to enter here is the student's name and birthdate (You MUST have the birthdate.). You must enter it in this order, separated by commas:
   Last Name,First Name (official "birth certificate" first name),Middle Name,Preferred Name (if different from first name),Suffix (like "Jr.," or "II")
   Then enter a semi colon, followed by the Birthdate, in this format: yyyy-mm-dd

Samples, using a person whose birth certificate name is "Jerold William Crosby," but he goes by "Jerry."
- Only have first and last name: Enter "Crosby,Jerold;2014-02-21"
- Have first, last and middle names: Enter "Crosby,Jerold,William;2014-02-21"
- Have a preferred name, but no middle name: Enter "Crosby,Jerold,,Jerry;2014-02-21"
- Have first, last, middle and suffix: Enter "Crosby,Jerold,William,,Jr.;2014-02-21"

4. After you've entered the name and birthdate information, hit CRTL-F (for "find"). The program will look for any matches in the system. If no matches are found, "no matches" will appear next

to the name field (screenshot below). If a single match is found, go to step #9. If multiple matches are found, go to step #11.

Detail Viewer/Editor:

Performer: Crosby,Jerold,,Jerry;2014-02-21	no matches
Pedagogue: Crosby, Bethany	
Club: /United States/Oregon/Mount Hood/Crosby Junior (	
Instrument: Piano ▼	

DataStore ID:		**Restore ID:**	**XML Batch ID:**
Created Date:		**Created By:**	
Updated Date:		**Updated By:**	
Archived Date:		**Archived By:**	
Archived?: ☐ **Locked?:** ☐		**Reason:**	

Save Changes	Revert Values	Dismiss

**For other operations, right-click below the horizontal line in any gray area

5. Having found no matches, click CRTL-S (for "save" or "select") and the full student information window will appear (below).

Group?: ☐

Surname (Title): Crosby		**Pedagogue?:** ☐	**Performer?:** ☑
First Given Name: Jerold		**Admin?:** ☐	**Accompanist?:** ☐
Preferred Name: Jerry		**Member?:** ☐	**Composer?:** ☐
Other Given Names:			
Suffix:			
Birth Date: 2014-02-21			
AKA:			
Origin: /United States/Oregon/Mount Hood/Cros			
Performance History:			

DataStore ID:		**Restore ID:**	**XML Batch ID:**
Created Date:		**Created By:**	
Updated Date:		**Updated By:**	
Archived Date:		**Archived By:**	
Archived?: ☐ **Locked?:** ☐		**Reason:**	

Save Changes	Revert Values	Dismiss

**For other operations, right-click below the horizontal line in any gray area

6. If everything is correct (you may make changes if necessary), click the "Save Changes" button at the bottom.

7. After this you will be taken back to the previous window and you MUST click the "Save Changes" button on that window, too. You must click two "Save Changes" buttons in two separate windows to complete the process.

8. The new student record has been created!

9. If the program finds a <u>single</u> match to the name you entered, it will appear in the lower right area of the screen. If THAT name is a correct match (meaning the student already exists in the database), click CTRL+S (for "select").

   The student information window will now open, as shown in #5 above, and you can proceed from #5 to complete the new student entry.

10. If the program finds <u>multiple</u> matches to the name you entered, the list will appear in the lower right area of the screen. Use CTRL+N (for "next") and/or CTRL+P (for "previous") to scroll through the names until you land on the correct one. Then click CTRL+S (for "select") to select the correct one.

11. The student information window will now open, as shown in #5 above, and you can proceed from #5 to complete the new student entry.

Transferring a Student from Another Teacher

If, when you attempt to add a "found" student to your club and that student is currently in another teacher's club, a LARGE button will appear to the right of the *Performer* text field listing the current teacher and (club). To transfer the student into your club you must notify your club administrator; you will not be able to do it yourself. Your club administrator will need to know the student's name and birthdate to complete the transfer.