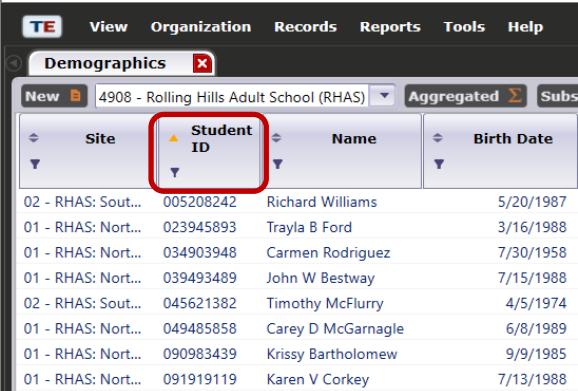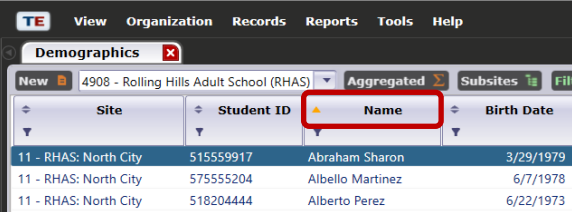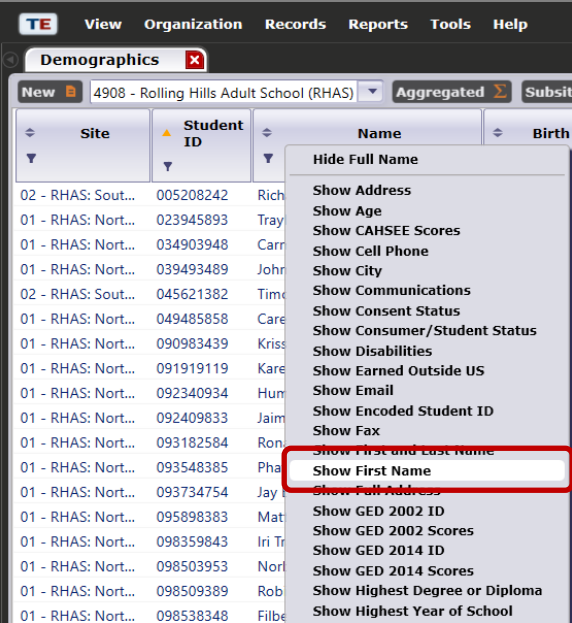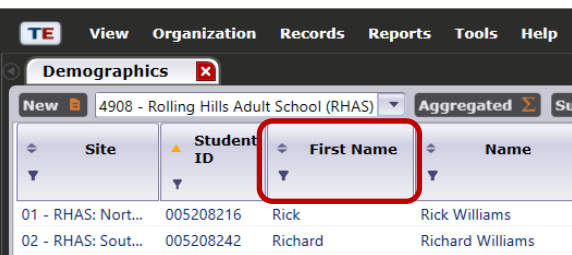## Customizing the Demographics Lister
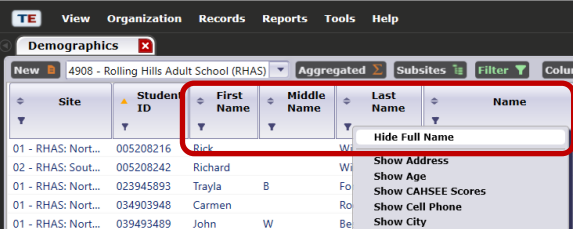
The student **Demographics Lister** is a list of records for students in the current program year (i.e., July 1 - June 30). Monitoring the integrity of demographic records as they are added to an online account is an ongoing task for TE Data Managers. Student demographic records can be added to an online account through eTests, manual data entry, importing, and scanning. Customizing this lister could help you identify:
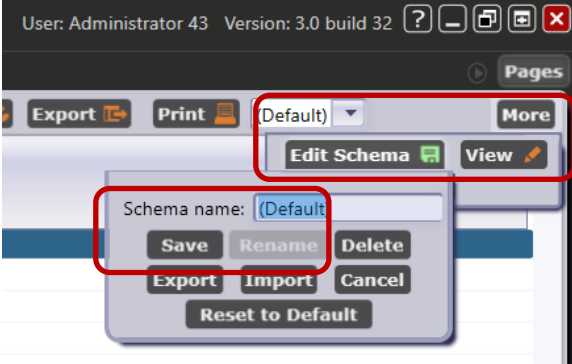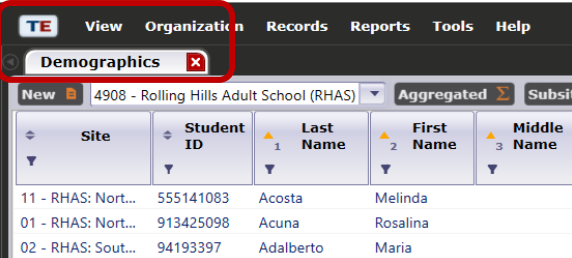
- Same student with different IDs in the current program year.
- Same student with different IDs in different program years.
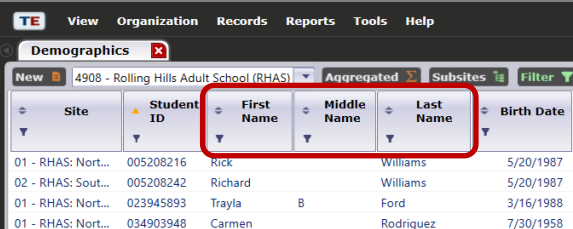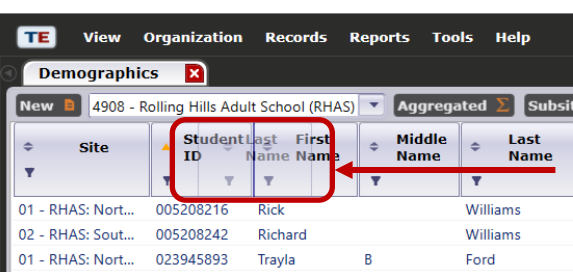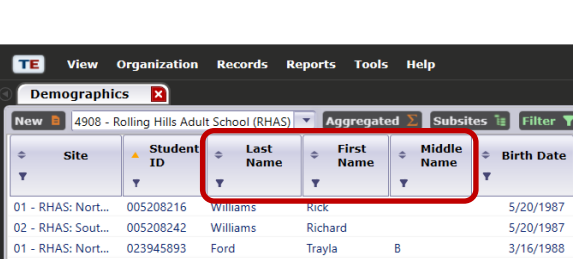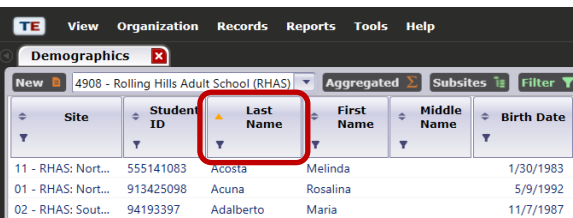- Same student with more than two different IDs.
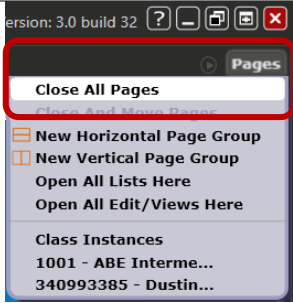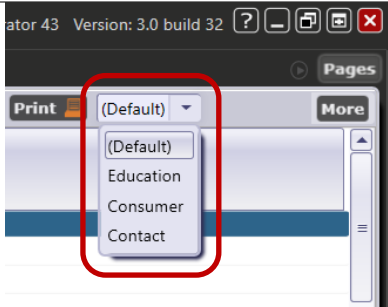
Follow these steps to customize the **Demographics Lister** to help with managing data and detecting possible duplicate student records.

Step	Screen	Description
1.		• From the **Menu bar** at the top, • Click **Records**. o Select **Students.** • Click **Demographics**.
2.		• A tabbed page opens to the list of **Demographics** records with a **Toolbar** along the top. o Records display for students having activity in the **Current Program Year** (July 1 – June 30). o Sorts on **Student ID**. • Headers in most lists have **Up/Down arrows** and **Filter icons**.

Listers

Step	Screen	Description
3.		• To sort by **Name**, ○ Click the **Name** column **UP arrow**. • By default, the **Name** column sorts by **First** name.
4.		• Each list of records has its own default **Schema**, or **Column Configuration**. • You may change the configuration of columns and save the **Schema** on your **TE Client**. • To split the **Name** column into **First**, **Middle**, and **Last** name columns, ○ Point your mouse in the **Name** column header. ○ **Right** mouse-click. • From the drop-down menu listing all columns available in the **Demographics** lister, ○ Click **Show First Name**.
5.		• Now you will see the **First** name column. • Repeat steps to add **Middle** name and **Last** name columns.

Listers

Step	Screen	Description
6.		• Now that the **Name** column is split into three columns for First, Middle, and Last names, you no longer need the column. • Right mouse-click in the **Name** column header. ○ Select **Hide Full Name**.
7.		• The **Name** column is now hidden from the list. • You may unhide any column to display again in the list of records. • Listers may be **Reset to Defaults** at any time.
8.		• Reordering columns will further customize the list of **Demographics** records for your TE Client. ○ Left click-and-hold your mouse in the **Last Name** column header. • While holding, drag the **Last Name** column left of the **First Name**, and then release your mouse.
9.		• The **Demographics** lister now displays names in a **Last**, **First**, and **Middle** name column configuration.
10.		• In the **Last Name** column header, ○ Click the **UP** arrow to sort alphabetically.

Step	Screen	Description
11.	 1. First, sort by **Last Name.** 2. Second, sort by **First Name**. 3. Third, sort by **Middle Name**. *Note!* Adding **Gender** and **DOB** columns helps identify duplicate records of the same student.	• Suggestion: Configure and presort columns: 1. Click the **UP** arrow in the **Last Name** column header. 2. Click and hold the **Shift** key on your keyboard, then click the **UP** arrow in the **First Name** column header. 3. Click and hold the **Shift** key again and click the **UP** arrow in the **Middle Name** column header. • Release the **Shift** key.

12.	
	
	Remember!
	• You can always reset listers to their **Default** schema.
	
	    o Click **Reset to Default**.
		• To save the configuration and filtering of your columns,
		
		    o Click the **More** button from the **Toolbar** at the top right for the "more" buttons.
		
		    o Click **Edit Schema**.
		
		    o Enter **"Your" Schema Name**.
		
		    o Click **Save**.

13.		• Check to confirm that your TE Client will display the **Demographics** lister in "your" default Schema next time you open it. • To close the **Demographics** lister, o Click the **Red X Box** on the **Demographics** tab.

Listers

Step	Screen	Description
14.		• You can close several pages simultaneously by clicking **Pages** at the top right. • From the drop-down menu, o Click **Close All Pages**. o Or click individual **Pages** listed at the bottom of the menu.
15.		• To reopen the **Demographics** lister, go to ➤ **Records > Students > Demographics** • The list of **Demographics** records should display as the saved default **Schema** on your TE Client.
16.		*Note!* • You may also name different **Schemas** and access them from the **Toolbar** at the top of the list. • Click the **(Default)** window down arrow and select a saved **Schema**.