

Daylite for students

Overview

This database template is designed for students. The purpose of this template is to provide the right tools that can help students excel in their educational pursuits and career goals. If you're a student who is new to Daylite, then this template is a good starting point as you can learn how to get organized using this application. If you are an experienced Daylite user, you will also benefit from this template by looking at the workflow and suggestions to enhance your productivity.

This template was created keeping the general objectives of students in mind. We recognize that each person may have their own method for getting things done. You can completely customize this template based on your individual needs.

General Workflow

The following summarizes a general workflow for using this template.

1. If you're concerned about handling assignments, group projects or your coursework, you can start by creating a new project. Enter all the details related to the project and link the key people involved. Assign a suitable pipeline to track the progress of the project. Create activity sets comprising of the tasks and appointments you must complete for finishing the project.
2. If you're concerned about getting an internship or job, you can start by creating a new opportunity. Enter all the details related to the opportunity and link the key people involved. As you link contacts, assign a suitable role that identifies the contact's main function in the opportunity. Add a pipeline for tracking the progress of the opportunity. As you progress, change the pipeline stages accordingly.

Projects

Projects are containers for grouping work. Students can be responsible for multiple deliverables and managing all of them at the same time can be daunting. Projects allow you to encompass all the related work in one place and link the necessary items thereby making it easy to focus on the objective. This template includes projects such as "Essay writing-The Arctic Life", "Recent

economic recession—A research paper, " "Volunteer selection process" and many others. You can review these projects, understand how they have been set up, and create your own projects in Daylite.

Opportunities

Opportunities represent the potential for getting a job/internship and career progression in the long run. In a broad aspect, they represent something that you want to do in future but will start working on it only after you win the opportunity. For example, this template includes opportunities such as "Software engineer position," "Technical Communications internship," "Volunteer work for children's charity" and a few others.

Once you are able to win the opportunity and you wish to start working on it, you can easily convert it into a project by choosing **Create > New Project from Opportunity**. Daylite enables you to bring over the contacts, organizations, tasks, appointments, and notes into your project to provide further convenience.

Contacts

Contacts are the people associated with you. You can create contact records for your classmates, teachers, employers, friends, etc to store important information about them. Daylite enables you to link a contact with another contact, organization, project, opportunity or group. If you're interested in classifying contacts, you can tag them with a category and single or multiple keywords.

For example, students who are in the same class as you can be tagged with the category "Classmate." Further, you can set up Smart lists to display all contacts tagged with the category "Classmate."

Categories and keywords

Categories are useful for classifying items in your database. For example, the student template has categories such as *Classmate*, *Potential Employer*, *Principal*, *Teacher*, *Private Tutor* and many others for grouping contacts. Projects are grouped by assigning categories such as *Assignment*, *Internship*, *Outdoor activity*, *Volunteer work*, etc. For opportunities, you can assign categories such as *Career*, *Job*, *Internship*, and *Volunteer work*.

Keywords allow a more detailed classification of contacts, organizations, projects, and opportunities. They can be used to tag these items with descriptive words or phrases that will help you to find the right data more easily. For example, in this template, you can tag projects with keywords such as *Computers, Arts, Languages, Geography, Summer job* and many more.

Depending on how you wish to classify your data, you can set up categories and keywords that make most sense to you.

Roles

When you link contacts with organizations, projects, or opportunities, they are connected by a role. The role describes the kind of work or function that someone has in an organization, project, or opportunity. In this template, you can assign contact roles such as *Advisor, Candidate, Faculty, Decision maker, Student, Volunteer* etc and organization roles such as *Vendor, Supplier, Customer*, etc. Daylite enables you to create custom roles that are closely applicable to your scenario.

Pipelines

Pipelines describe your workflow evolution from start to end, as well as progress in achieving tasks and objectives. Assigning a pipeline to a project/opportunity helps you to view how far you've progressed and what more needs to be done in one glance. This template has "Group presentation," "Assignment," and "Design Project" pipelines for projects and "Getting a job" pipeline for opportunities. However, you can also set up your own pipelines matching your workflow and individual needs.

Activity Sets

Activity sets are useful for workflow that needs to be completed in the same order or is time sensitive. They reduce the need to manually create the same tasks and appointments for multiple projects of similar nature. This template has the following activity sets:

- **Coursework:** This activity set includes the tasks and appointments to be completed for each course you're enrolling.
- **Essay writing:** This activity set includes tasks that must be completed for essay writing assignments.
- **Job application:** This activity set includes tasks and appointments to be completed for getting a job.

- **Registering for elective subjects:** This activity set includes tasks you should perform in order to register for elective subjects.
- **Research paper:** This activity set includes the tasks and appointments to be completed for submitting a research paper.
- **Volunteer selection:** This activity set includes the tasks and appointments involved in hiring volunteers.

These activity sets come with pre-defined due dates. However, if you wish to use the activity sets feature without setting due dates for tasks and appointments, you could do so. In the Activity Sets pane of Daylite Preferences, keep the “Start: ____ Day(s) after start date” or “Due: ____ Day(s) before end date” blank.

Resources

There are a number of resources to help you learn more about Daylite and provide answers when you have technical questions.

- Our support website and knowledge base have many articles that can help you solve technical difficulties. Visit <http://www.marketcircle.com/help/> for more information.
- We have interactive [forums](#) where you can share ideas, tips, and questions with fellow Daylite users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.