

# Student Manager User Guide

2014.11.2  
MUSAC Ltd © 2014



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[The Manual](#)

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## 2 Software Licensing Agreement and Warranty

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### 2.1 MUSAC Limited Software Licensing Agreement

#### PARTIES

- 1 MUSAC Limited ("the Licensor")
- 2 You ("the Licensee")

#### BACKGROUND

- A The Licensor is the exclusive owner of the Software.
- B The Licensor has agreed to grant a license to the Licensee to use the Software upon the terms and conditions contained in the Software Licensing Agreement and any schedules attached.

See most recent release Classic User Guide from the MUSAC sidebar for full Agreement and Warranty.

### 2.2 Software Warranty

This warranty covers any physical defect in the software distribution media.

MUSAC Limited agrees to replace defective DVD/CDROMS by return post, without charge.

MUSAC Ltd is not responsible for problems caused by computer hardware or computer operating systems.



All warranties or merchantability and fitness for a particular purpose are disclaimed and excluded. MUSAC Ltd shall not in any case be liable for special, incidental, consequential, indirect, or other similar damages even if MUSAC Ltd has been advised of the possibility of such damages.

MUSAC Ltd is not responsible for any costs incurred as a result of lost profits or revenue, loss of use of the software, loss of data, cost of recreating lost data, the cost of any substitute program, claims by any other party other than the Licensee, or for other similar costs. MUSAC Ltd's aggregate liability arising from or relating to this Agreement or the software or the documentation is limited to the license price paid by the Licensee.

The agents, distributors, and dealers of MUSAC Ltd software may not modify the Limited Warranty nor make additional warranties binding on MUSAC Ltd.



## Conventions used

Example	Description
<Enter>	Means 'Press the <b>Enter</b> key'
Ctrl	Refers to the Control key, usually displayed as <b>Ctrl</b> on your keyboard
Alt+S	Press and hold the <b>Alt</b> key then press the 'S' key at the same time
Click <b>Next</b>	Click on the screen button labelled <b>Next</b>
Double-click	Press the left mouse button twice in rapid succession
<b>Type this</b>	You are required to type or locate exactly as it is written Mono font also used to display files names and paths
Select or Highlight	Click at the end of text or to one side of an object and hold the left mouse button down while dragging back across the text or object.
MUSAC SM, CM, AB6	Refers to MUSAC Classic product suite Student Manager, Classroom Manager, Absences for Windows (AB6)
<b>Start, Enter</b>	Colour used to draw attention to text
	Indicates compliance with Ministry of Education requirements
	To indicate a school's MUSAC Administrator tasks

Information within this document may contain data from a school. Where this has occurred the identities have been rearranged and any visual data has been purposely distorted.

## MUSAC Website Registration

MUSAC Classic's installation on CDROM contains all the necessary files. User Guides and future update files are available for downloading by registered users of the MUSAC website (<http://www.musac.co.nz>). If not already registered on our website, visit the MUSAC website to register for downloads and support.



Figure 1: MUSAC Website

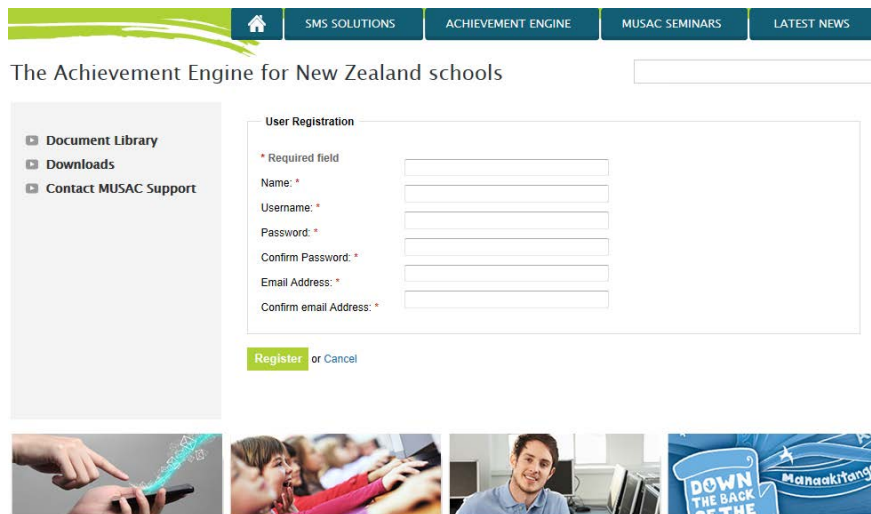


Figure 2: Registration Process

- 1 Complete all fields
- 2 Click Register

You will now receive an email from us with more details.

## 3 Installation Process

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MUSAC Ltd strongly advises that an authorised agent completes the installation process. This will ensure that installation goes smoothly and efficiently.

### 3.1 Install the MUSAC System Files

These must be installed on EVERY computer using a MUSAC software module. They hold the overhead utilities and components which must form part of the system of each individual computer, and are part of MUSAC's new mega installer.

If your fileserver is a 'dedicated' fileserver (ie. a computer used solely to manage the network and not used for running programs and data entry) then you do not need to install the system disks on this machine.

The system files are available to download from our website Downloads area: [www.musac.co.nz](http://www.musac.co.nz).

Please consider your specifications and anticipate future needs before acquiring new hardware. Although the software may run on lesser systems, the specifications given will provide a desirable level of performance for the typical user.

It is also worth noting that the correct installation, configuration and maintenance of your systems are essential to a well-functioning computing environment. For this reason, use of the services of a MUSAC agent is recommended. For further advice on your network, including infrastructure auditing, please contact MUSAC Software Support on telephone 0800 600 159. if you have queries about whether or not a specific hardware configuration is suitable for use with MUSAC software.

MUSAC highly recommends that initial training is conducted so staff can receive full benefit from Classroom Manager's extensive list of features. Please contact your local MUSAC agent for training – see Contact Details

#### *For More Information*

Please contact your local MUSAC product specialist.

## 4 MUSAC Mega Installer

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There are two sets of files involved in the MUSAC installation process:

- 1 The MUSAC 32 bit system files for all our software
- 2 The MUSAC program files
- 3 The Ministry's Wrapper and .Net 3.5 Framework are also necessary for interoperability with the Ministry's server for NSN, ENROL, roll returns, etc.

This installer installs or upgrades the core MUSAC Classic Products

- Student Manager
- Classroom Manager
- Absences 6
- OneScreen
- Staff Manager
- Timetable (secondary and area schools only)

The following products are still installed and managed separately:

- Financial Manager (Accounts/Assets)
- Library Manager

### 4.1 Installation Options

The installation options are minimal to enable easy installation. You first select the installation location (which the software will detect if the product has previously been installed on this machine).

You **MUST** ensure no users are currently running any MUSAC Classic module.

See MUSAC Classic Release User Guide.

## 5 OneScreen

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### 5.1 OneScreen tabs for convenient summaries in one place

Depending on your school type and/or other MUSAC modules your school is using, the OneScreen module displays tabs of student information conveniently in one place.

- 1 Personal  
Individual and caregiver contact data, a summary of the students' Attendance and Pastoral information, the number of library books they have issued along with any overdues.
- 2 Pastoral  
Lists the pastoral transactions for that student over the date range selected. To accommodate PB4L (Positive Behaviour for Learning); Time, Location, Possible Motivation, Others Involved fields are included in the pastoral transaction input screen in Student Manager; in the Provide full points, and Export transaction details pastoral lists.
- 3 Attendance  
Details the attendance data recorded in AB6 on the student including a break-down by attendance code, subject graph for secondary schools, and timetable day.
- 4 Assessment tab for primary schools showing OTJ graph and comment.
- 5 NCEA tab for secondary schools using our TTSM software provides an overview including graphics, of student NCEA progress and achievement. The extended summary report provides an overview including standards and credit totals for the year, course endorsements, includes literacy and numeracy results.

To enable you to easily select different students from a filtered list applicable to your teaching or administration position within the school, OneScreen has a built in filter to allow quick selection of the required students. For example, teachers may view students in their relevant class(es).

See OneScreen User Guide available from the MUSAC sidebar for more detail.



## Student Manager



## 6 Introducing Student Manager

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### 6.1 About Student Manager

Student Manager records information relating to students' enrolment details, family details, subject details, financial transactions and pastoral information. The data for Student Manager is held primarily within the Classroom Manager database though it has a small database of its own which holds extra data used solely by Student Manager.

The student data screens are Classroom Manager documents, based on a subset of the data columns which form the basis of that module. You may develop your own screens (documents) in addition to the basic set supplied with the software offering schools a great deal of flexibility to meet their own needs.

The database (`cm.mdb`) is like a spreadsheet with columns, and one row for each student in the school. Each time data is recorded in a cell it is 'date and teacher' stamped.

	Column 1	Column 2	Column 3	Column 4	Column 5	....
Student 1						
Student 2						
Student 3		Data cell				
Student 4				Data cell		
Student 5						
Student 6						
....			Data cell			

Figure 3: CM is like spreadsheet

Documents are designed to show the data held in a cell for a generic student. When the document is viewed then the data belonging to the current student is not only displayed on the document but may also be entered or edited via the document.

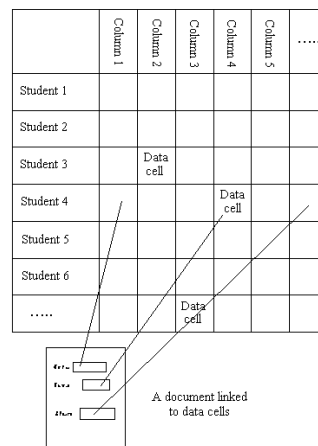


Figure 4: A document linked to data cells

A school has documents for data entry and others for reports to parents, the Principal or to the Board of Trustees. Each is linked to data in cells.

Each teacher views only their own students, selecting from one or two of the documents the school has designed. Dossiers provide this person-centric view. A dossier is a selection of students and a selection of columns (a subset of the database); and a document or two used to view/access the data. Once set up, a teacher may have one or more dossiers.

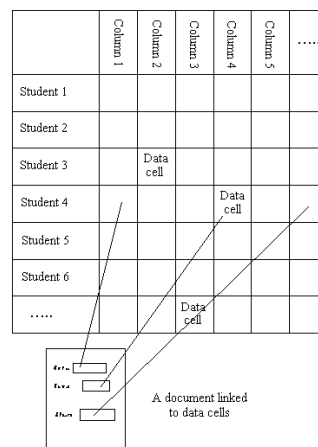


Figure 5: Several documents linked to data cells

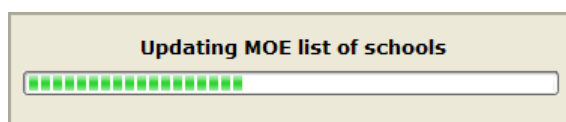
The school administrative staff usually enter the module viewing all students and probably apply a filter before proceeding.

## 7 Opening Student Manager

After logging in with your **user name and password**, the MUSAC side bar is loaded with the modules you have rights to. SINGLE-click the Student Manager graphic. Currently you are able to open OneScreen, ClassRoom Manager, ClassRoom Administrator, Student Manager, AB6, QuickFind, Staff Manager and the Backup utility. Modules which are installed, but for which you have no access rights will not appear in the MUSAC side bar either.

To launch Library Manager and Financial Manager you will need to log on a second time. The first time you enter Student Manager (or following a backup and restore), the message advises you the MoE list of schools, and other data is being updated, so please wait while perhaps:

- 1 A test that ensures several subdirectories (eg. /backup, /nzqa, /natcols) have been created. If they are not found then they are created.
- 2 Tests are also carried out to ensure that the databases upon which the various packages are based do, in fact, exist. If they are found to be missing then a copy of each database is created.



### 7.1 Student Manager (sm.exe)

The main menu, containing the student data editor, the student finances component, the student pastoral transaction component and the components used for pastoral document and financial document editing.

Each time you login, Student Manager remembers the group of students which you last displayed (ie. your last filter) and will redisplay these.

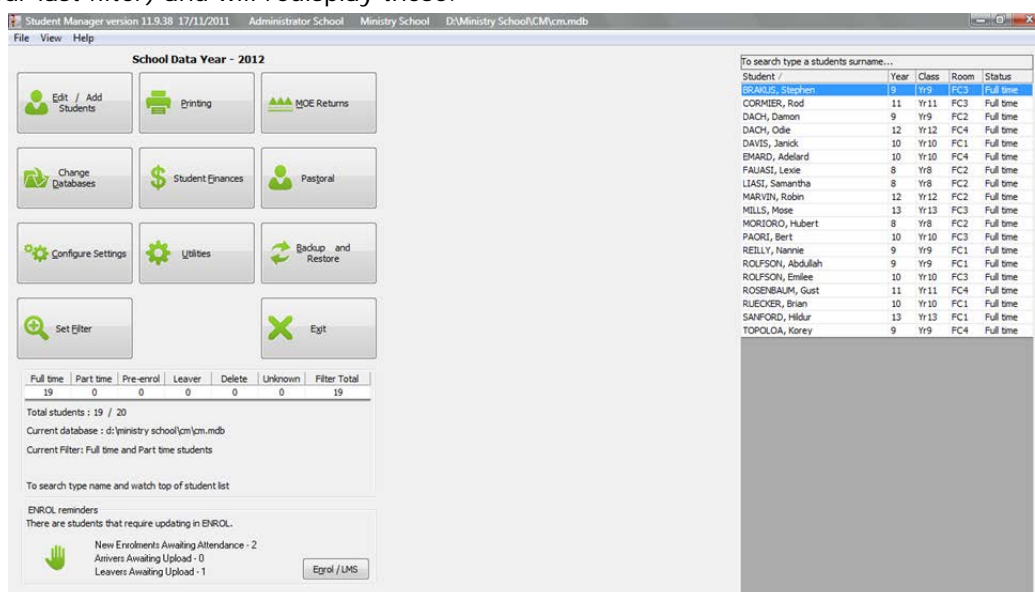


Figure 6: The main menu

Student Manager version 11.9.38 17/11/2011 Administrator School Ministry School D:\Ministry School\CM\cm.mdb - (Personal details:dnt BRAKUS)

**Student: Stephen BRAKUS** Year: 9 Class: Yr9 Room: FC3

Legal Surname: BRAKUS  
 Preferred Surname:   
 Legal Firstname: Stephen  
 Preferred Firstname: Stephen  
 Middle Name:

Other personal details:

Family:   
 Family details:

Residential Address (No P.O. Box or Private Bag)  
 Address 1:   
 Address 2:   
 Address 3: CITY  
 Address 4:   
 Address 5:

Address Info Withheld (MoE Privacy Indicator):

Mailing details:

Home phone: 3565897  
 Student's phone: 3547894  
 Student's email: brakuss@hotmail.com

This year: Year 9, Class 2012 Yr9, Room 2012 FC3  
 Next year: Year 10, Class , Room

Local student ID: 30800015  
 Type: International Exchange  
 Status: Full time  
 Nat. Student Number: 1248124817  
 URL: URL not set

Gender: Male  
 Date of birth: 11/11/1999  
 Age at Jan 1: 12.01.21  
 Age at today: 13.00.11  
 Enrolment number: 07/015

Buttons: Medical, Caregiver details, Options, Pastoral, Sensitive, Financial details, Timetable, Register details, Ministry details, Maori details, Enrolment details, Other personal details, Family details, Address Info Withheld, Mailing details, Get/Check NSN

Figure 7: Student data editor

SM Financials version 6.16.585 03/10/2008 MUSAC MUSAC MOE Data 6 C:\CM\cm.mdb

Help

- Transactions
- Process Autopayments
- Print any Temporary Lists
- Invoicing
- Reports
- Global Processes
- Print Statements
- Print Receipts
- Print Credit Notes
- Consolidation
- Billable Items
- Send Batch to Accounts
- Design Financial Documents
- Financial Defaults
- Close

Figure 8: Student Finances menu

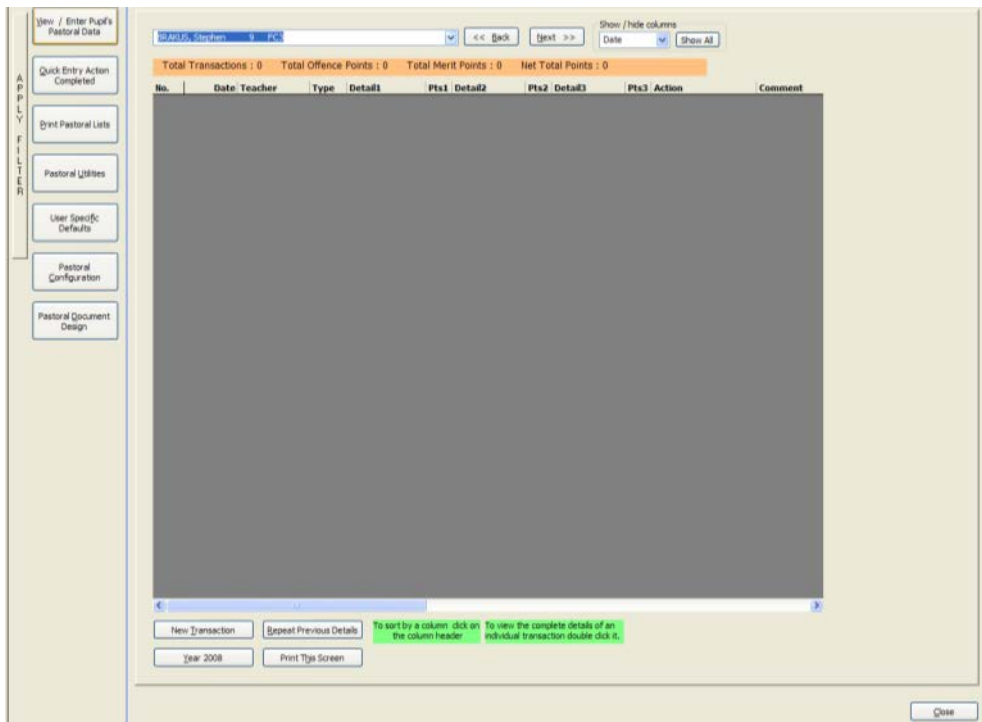


Figure 9: Pastoral menu

### Configure Settings

The configuration utility, used to set those details individual to your school.

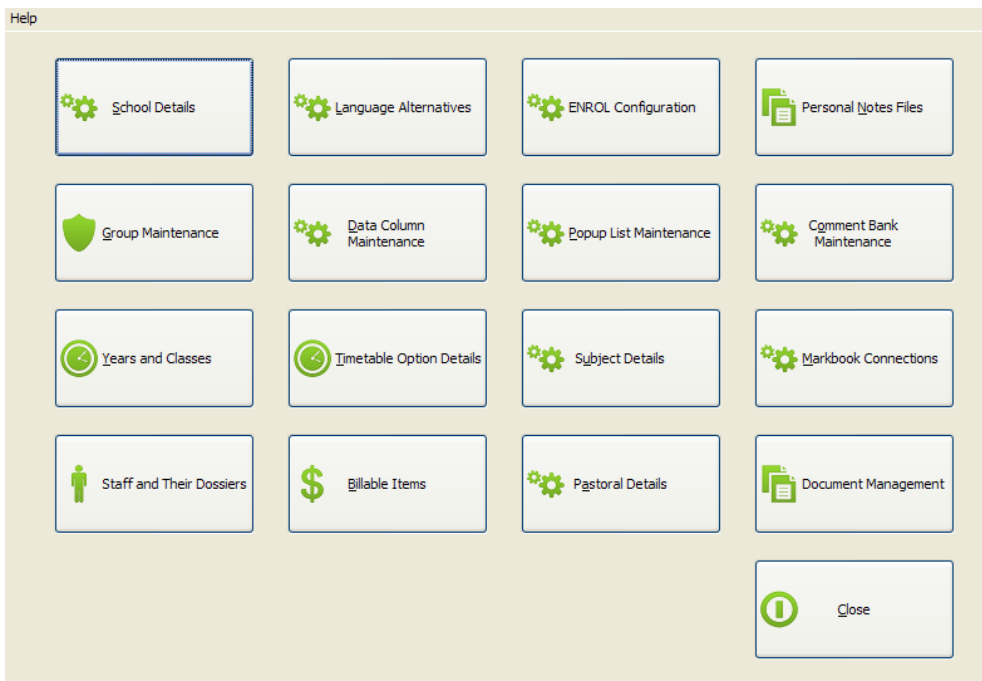


Figure 10: Configuration menu

### Utilities

Utilities are processes used to carry out database management functions.

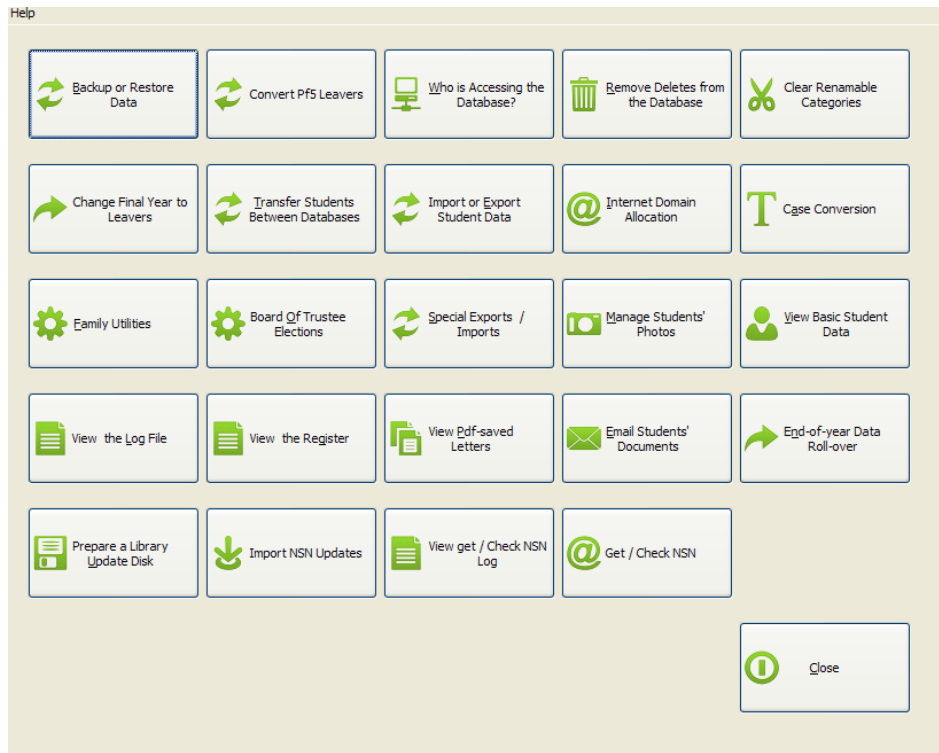


Figure 11: Utilities menu

### SM Lists

The component used for printing lists, timetables, tables etc.

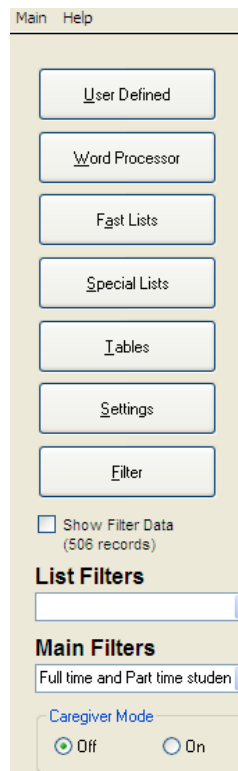


Figure 12: List Utility menu

### *National Standards – Anniversary List*

For the assessment criteria for National Standards, in 'Special Lists' an Anniversary list provides the year 1-3 anniversaries, ie. for students in years 1-3 on their 1st, 2nd and 3rd year anniversary of them starting school so the student will have an OTJ report (Objective Teacher Judgement), and thereafter at the end of each year. The OTJ entry screen is a form so the data will automatically calculate the right year/'subject'/column combination. Teachers gain access to this in Classroom Manager Teacher by clicking a new object in the small upper left dossier panel. Once a year in Reading, Writing and Mathematics every student in years 1-8 is given either a Well Below, Below, At or Above grade along with a General comment and/or a Next Steps, and/or School Support and/or Help at Home comments. Refer to our website [www.musac.co.nz](http://www.musac.co.nz) for the latest in National Standards functionality being incorporated.

The anniversary list uses only students in the current main filter (Term: Year: 1,2,3,All) of SMLists; and

- 1 filters by a range of Year Levels
- 2 filters by a range of Anniversary Dates
- 3 sorts by Anniversary Date or Surname
- 4 groups by Vertical Group (ie. room)
- 5 groups by Year Level
- 6 automatically generates 1st, 2nd and 3rd anniversaries of starting school

### *MOE Returns*

The component used to generate the Ministry of Education returns.

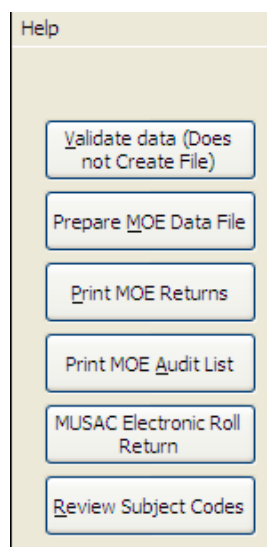


Figure 13: MOE Returns menu

## **7.2 Selecting or creating another database**

The Change databases function allows you to view a different database eg. leavers file. All databases found in your \CM directory will be listed along with the number of students in each. To transfer to a different database, select it from the list displayed. You will be asked to confirm you wish to switch and then be returned to the main screen where the students will be displayed. (If you select a leavers' database and return to the main screen where you filter currently excludes

leavers then, in all probability (whatever that means) you will see no students. Do not be disconcerted - visit the filter setting process and reveal your students.

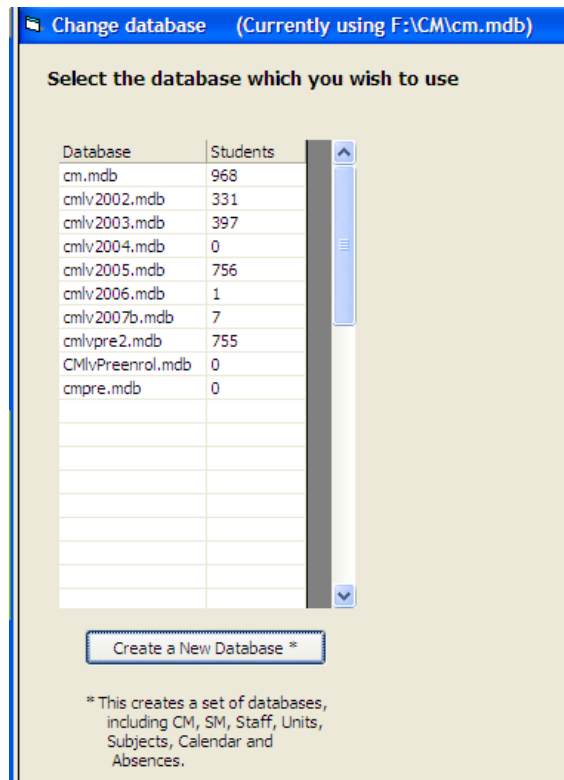


Figure 14: Selection of the database

Alternatively to create a new database click on 'Create a new database' and the window will display some further alternatives, as shown below.

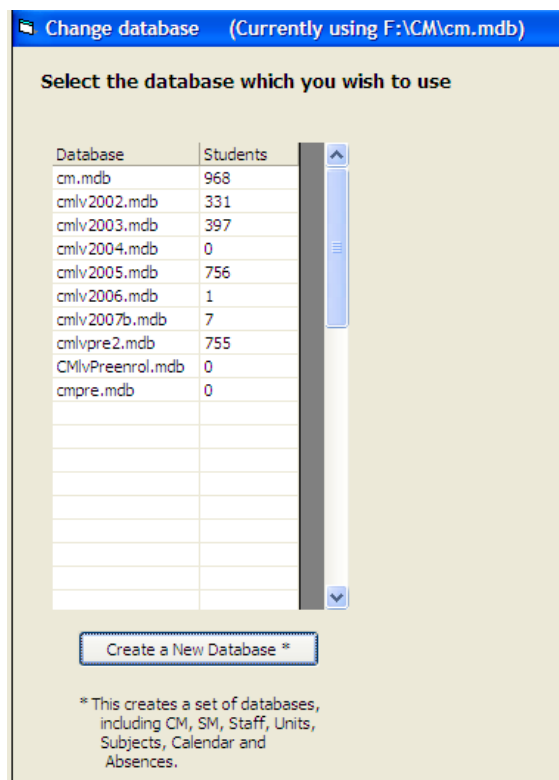


Figure 15: Creating a new database



Name your new database and make the various selections displayed on the screen. Be aware that this process generates new databases, similar to those which currently comprise Student Manager, but named according to the name you have supplied. You can then select and change to your new database. This time you should CERTAINLY see no students when you return to the main screen.

Please do NOT create databases for your leavers. The database(s) for these are automatically created when you transfer students to the leavers database under the 'Utilities' process for this purpose.

## 8 The Main Menu

### 8.1 The menu screen

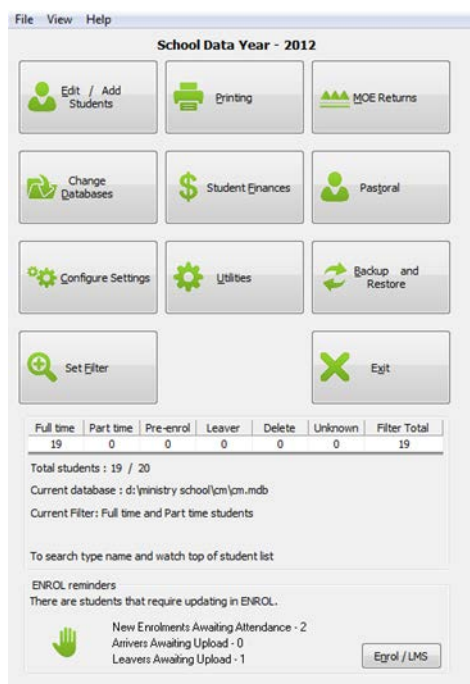


Figure 16: The main menu screen

This screen displays :

- Some 'top menu' options
- Buttons which take you to the main functions of Student Manager
- A grid displaying the currently filtered students (on the right but not shown here)
- An information panel providing summary details relating to your current filter
- Access to the ENROL utility. The description at the foot of the screen is available by mousing-over the 'ENROL/LMS' button.

### 8.2 The top menu options

#### File

The first option under the heading of 'File' is an alternative exit to the package. Use the Exit button on the main screen.

File > Temporary files

In order to pass information concerning your preferences and your selection of students to the other parts of the package, two files of 'temporary' data are generated each time you click on one of the main buttons which are read by the program component which you have selected. These files are stored in a directory on the terminal which you are using and their names incorporate your personal code, so that, each time you use the package, the program remembers who you are and what your particular settings (eg. filter) are. This means that each user has his or her own pair of files.

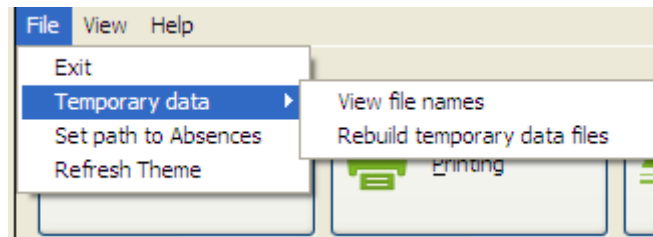


Figure 17: The 'File' choices

### View

The first option under the 'View' menu allows you to determine how students' names will appear in the main display on the menu screen. The choices are shown below.

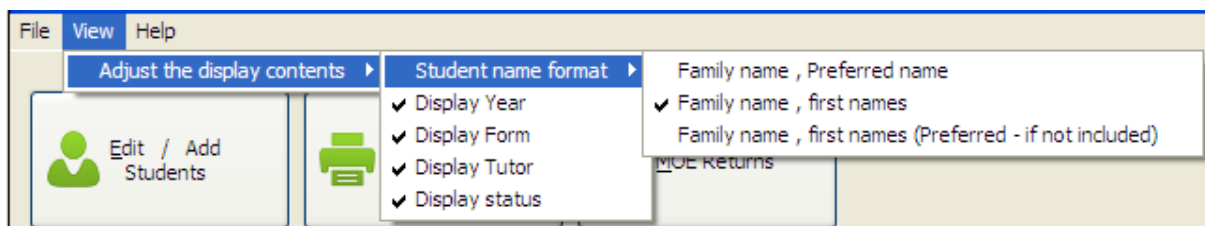


Figure 18: Name format choices

The second option allows you to adjust which extra information of each student is displayed in the grid. You can turn four of the extra columns on or off. This is a personal setting. Each user can have his or her own display. In fact, this applies to many aspects of the package. Various settings which you make will be recorded against your name and will be automatically set every time you enter the package. There are some global settings not specific to individuals. These options are shown below.

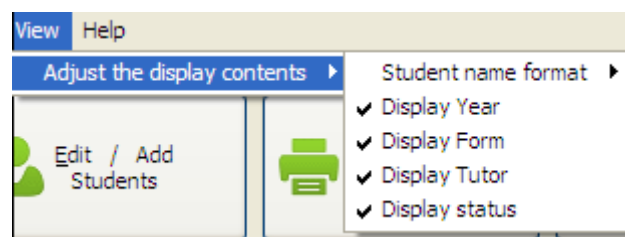


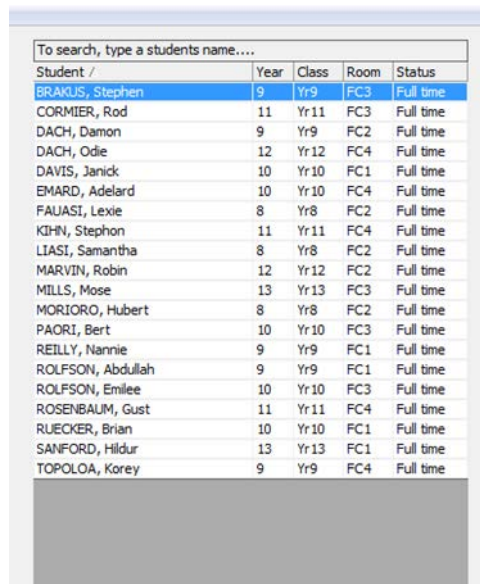
Figure 19: The visible columns

### Help

The final top menu option provides access to the SM user guide which contains bookmarks (and when viewing the PDF press Ctrl+F to view the 'Search' field if it is not visible and you wish to search by topic or key word. Some on-screen help files are available where a 'Help' button is shown within the program. All user guides are also accessible by clicking the question mark icon on the MUSAC side bar.

### 8.3 Setting filters

If, in the 'View' choices above, you have ticked all of the possible columns then the student display on the right side of the screen will appear as below.



To search, type a students name....				
Student /	Year	Class	Room	Status
BRAKUS, Stephen	9	Yr9	FC3	Full time
CORMIER, Rod	11	Yr11	FC3	Full time
DACH, Damon	9	Yr9	FC2	Full time
DACH, Odie	12	Yr12	FC4	Full time
DAVIS, Janick	10	Yr10	FC1	Full time
EMARD, Adelard	10	Yr10	FC4	Full time
FAUASI, Lexie	8	Yr8	FC2	Full time
KIHN, Stephon	11	Yr11	FC4	Full time
LIASI, Samantha	8	Yr8	FC2	Full time
MARVIN, Robin	12	Yr12	FC2	Full time
MILLS, Mose	13	Yr13	FC3	Full time
MORIORO, Hubert	8	Yr8	FC2	Full time
PAORI, Bert	10	Yr10	FC3	Full time
REILLY, Nannie	9	Yr9	FC1	Full time
ROLFSON, Abdullah	9	Yr9	FC1	Full time
ROLFSON, Emilee	10	Yr10	FC3	Full time
ROSENBAUM, Gust	11	Yr11	FC4	Full time
RUECKER, Brian	10	Yr10	FC1	Full time
SANFORD, Hildur	13	Yr13	FC1	Full time
TOPOLOA, Korey	9	Yr9	FC4	Full time

Figure 20: The currently filtered students

This list displays the students you have personally chosen to display, by setting a filter. Your preferred filter is remembered and automatically redisplayed each time you enter.

To set a filter, click on 'Set Filter' from the main screen. The following screen will be displayed.

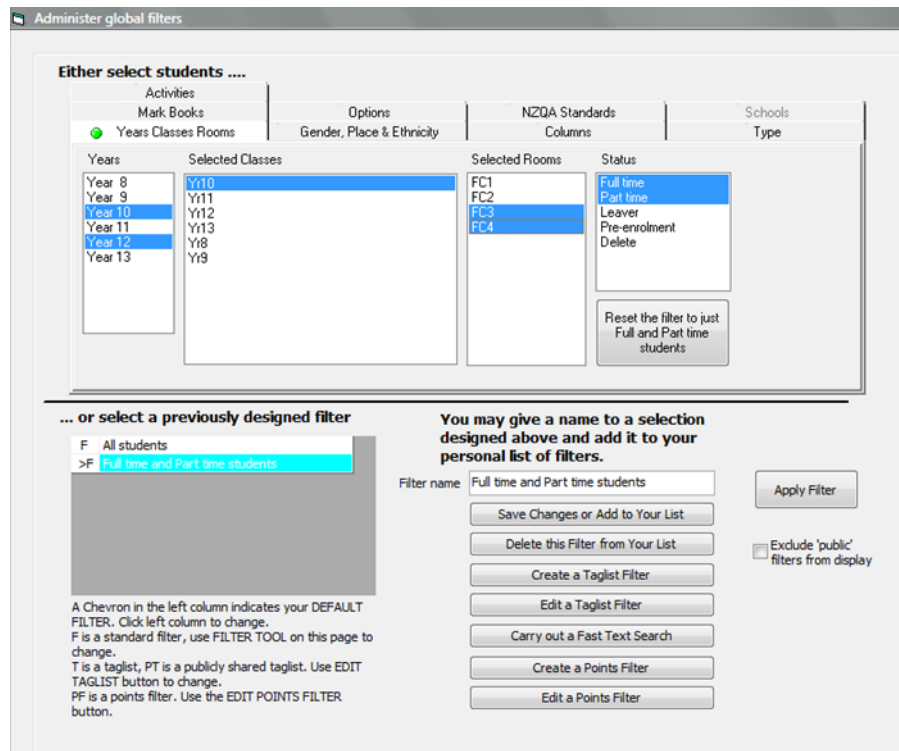


Figure 21: The filter setting screen

This screen allows you to adjust your personal filters determining which students will be displayed on the main screen and which students accessible via the editing and other buttons.

Initially you will see two filters - 'All students' and 'Full time and Part time students'. The second of these is highlighted and has a '>' sign in its left hand column. This indicates that this is currently your 'favourite' filter - the one which will be active each time you enter the module.

You have four options concerning filters:

- 1 Set a filter by selecting from the screen on the student selection tool and then press 'Proceed' to return to the main screen and have your new selection displayed.
- 2 Select, give it a name and save it (adding it to your list) for future use.
- 3 Set a 'tag list' filter of selected students.
- 4 Do a 'Fast find' for students whose data contains any number, word or phrase eg. find all the students who live in Roseberry Street.

For a full description of student selection too, see Appendix 3 (Student Filter). Some tabs may be inactive (see 'Schools' in the Figure below - as you are (probably) not 'multi-school').

**Note:** You can make selections from more than one tab and they will be 'ANDED' together. Generally, multiple selections from within one tab are 'ORRED' together. For example, you might select those students who are 'in year 9 or year 10' AND 'Male' AND 'whose family name starts with 'A' OR whose family name starts with 'B'

Student Manager  
MUSAC Classic 2014

As an example define a new filter for just year 12 students. The year 12 group below has been selected from the left hand list. The default setting of 'Full-time and Part-time' students has been retained in the right list.

The filter has been given a name 'Year 12' in the filter title area. The next step is to click on the button labelled 'Save changes or Add to your list'.

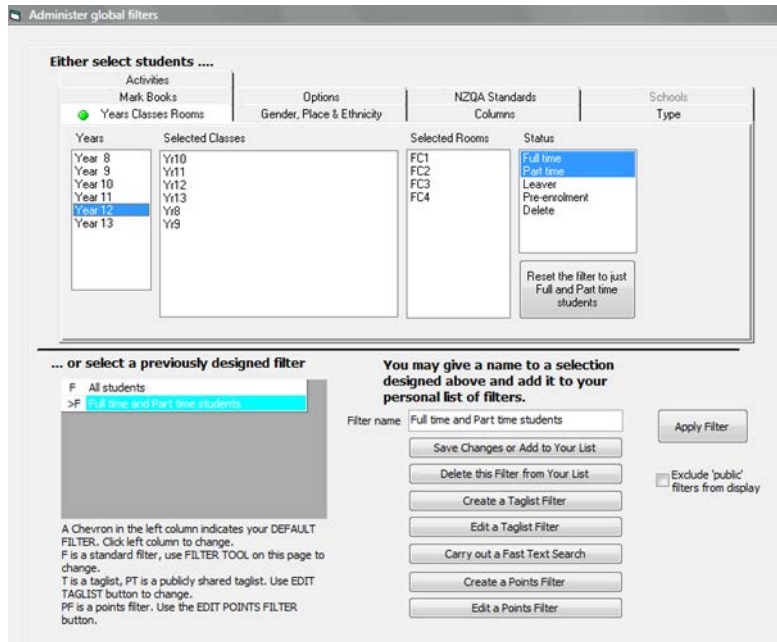


Figure 22: Defining a filter

Once saved, you can press 'Apply Filter' to return to the main menu with your new selection displayed. See below the new 'year 12' filter. Remember that this filter is yours and will only appear on the list when you use the package. Each person has their own list of filters.

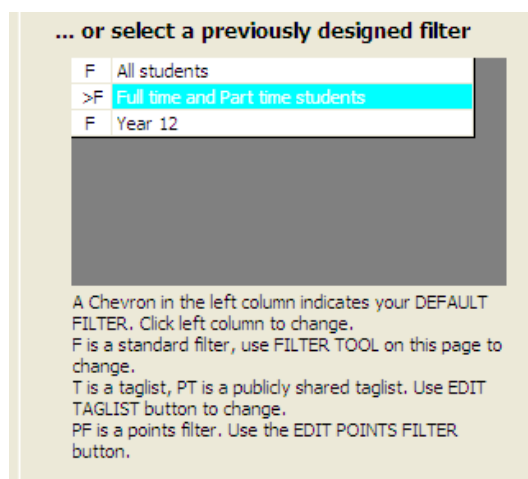


Figure 23: The new filter is added to the list

To make this your favourite filter, click against it in the left hand column. The following popup asks to confirm your choice.

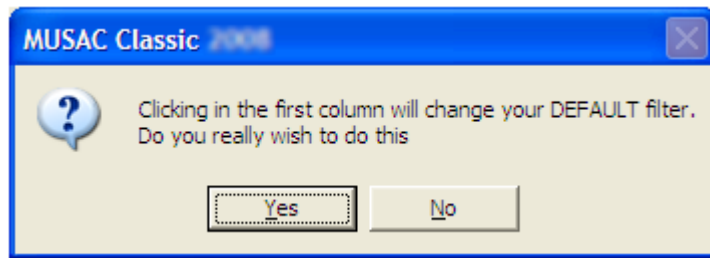


Figure 24: Favourite filter confirmation

'Tag list' filters

Click on the 'Create/edit a tag list filter' button for the following window. Select those individual students whom you wish to be included in your filter, give your filter a name, and click 'Save'.

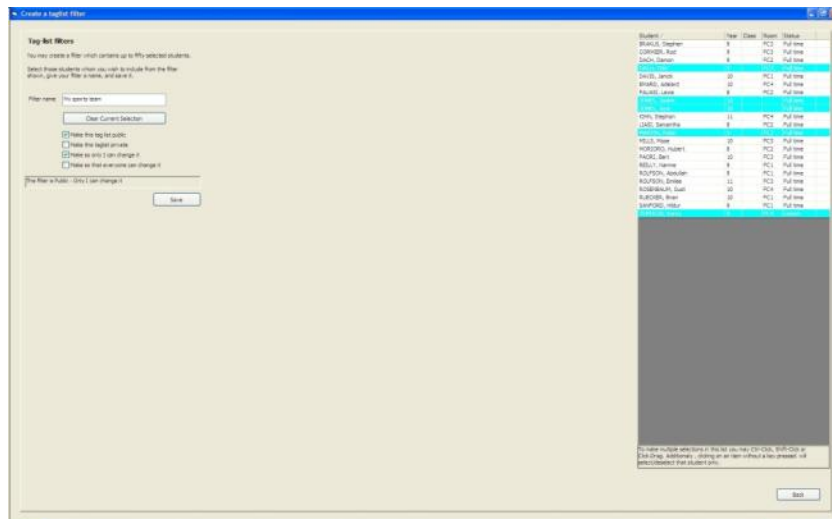


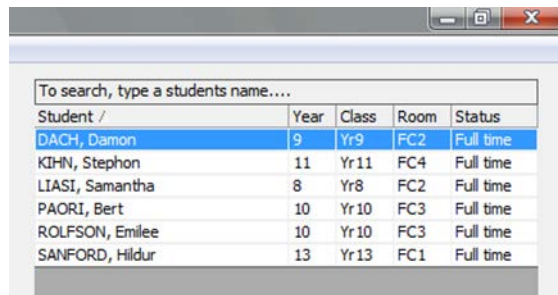
Figure 25: Creating a 'tag list' filter

You will be returned to the main filter screen and will see your tag list filter 'My sports team' listed.



Figure 26: The tag list has been added to the list

To apply this filter, select it from this list and click Save. You will be returned to the main screen and your selected students will be displayed.

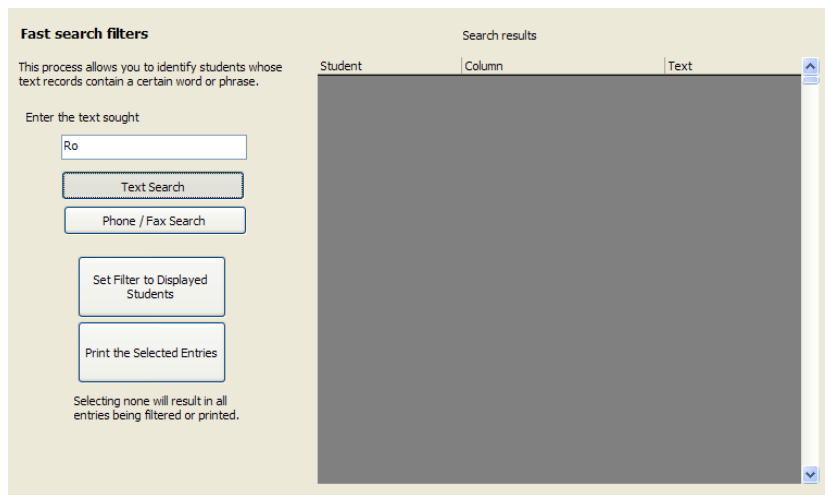


To search, type a students name....				
Student /	Year	Class	Room	Status
DACH, Damon	9	Yr9	FC2	Full time
KIHN, Stephon	11	Yr11	FC4	Full time
LIASI, Samantha	8	Yr8	FC2	Full time
PAORI, Bert	10	Yr10	FC3	Full time
ROLFSON, Emilee	10	Yr10	FC3	Full time
SANFORD, Hildur	13	Yr13	FC1	Full time

Figure 27: Just 'My sports team' students are displayed

You can make a tag list filter your favourite as described earlier.

For fast filtering click on 'Carry out a Fast Text Search'.



**Fast search filters**

This process allows you to identify students whose text records contain a certain word or phrase.

Enter the text sought

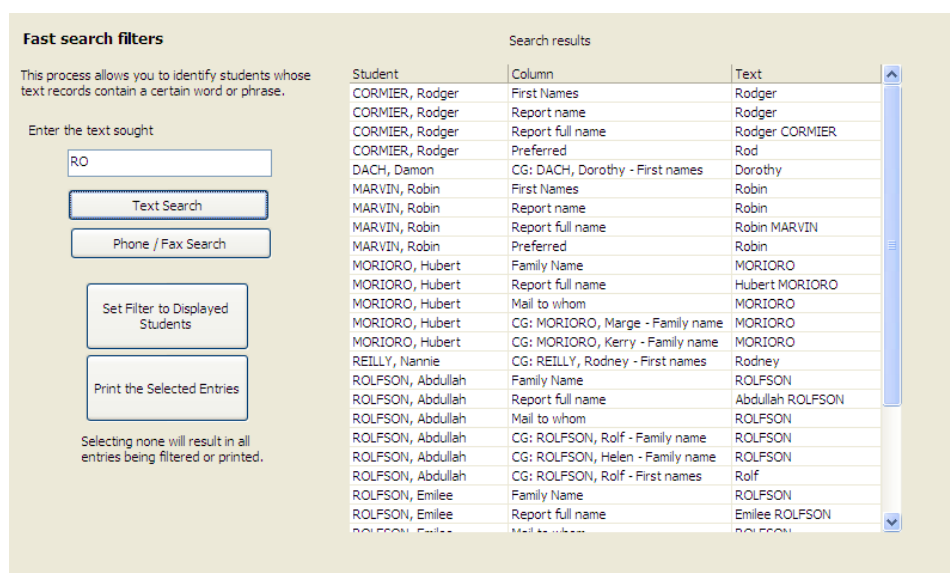
Selecting none will result in all entries being filtered or printed.

**Search results**

Student	Column	Text
---------	--------	------

Figure 28: The 'Fast search' screen

Type in the number, word or phase which you are seeking and press <Enter> (or click 'Search'). Search for 'Ro' ...



**Fast search filters**

This process allows you to identify students whose text records contain a certain word or phrase.

Enter the text sought

Selecting none will result in all entries being filtered or printed.

**Search results**

Student	Column	Text
CORMIER, Rodger	First Names	Rodger
CORMIER, Rodger	Report name	Rodger
CORMIER, Rodger	Report full name	Rodger CORMIER
CORMIER, Rodger	Preferred	Rod
DACH, Damon	CG: DACH, Dorothy - First names	Dorothy
MARVIN, Robin	First Names	Robin
MARVIN, Robin	Report name	Robin
MARVIN, Robin	Report full name	Robin MARVIN
MARVIN, Robin	Preferred	Robin
MORIORO, Hubert	Family Name	MORIORO
MORIORO, Hubert	Report full name	Hubert MORIORO
MORIORO, Hubert	Mail to whom	MORIORO
MORIORO, Hubert	CG: MORIORO, Marge - Family name	MORIORO
MORIORO, Hubert	CG: MORIORO, Kerry - Family name	MORIORO
REILLY, Nannie	CG: REILLY, Rodney - First names	Rodney
ROLFSON, Abdullah	Family Name	ROLFSON
ROLFSON, Abdullah	Report full name	Abdullah ROLFSON
ROLFSON, Abdullah	Mail to whom	ROLFSON
ROLFSON, Abdullah	CG: ROLFSON, Rolf - Family name	ROLFSON
ROLFSON, Abdullah	CG: ROLFSON, Helen - Family name	ROLFSON
ROLFSON, Abdullah	CG: ROLFSON, Rolf - First names	Rolf
ROLFSON, Emilee	Family Name	ROLFSON
ROLFSON, Emilee	Report full name	Emilee ROLFSON
ROLFSON, Emilee	Mail to whom	ROLFSON

Figure 29: The results of a search



Students are repeated if the sought text is found more than once in the database.

If you click Phone/Fax search a fast search will be carried out which ignores spaces and hyphens.

Select your students. Selecting none is equivalent to selecting all.

Student	Column	Text
CLEATOR, BRENT DOUG	First Names	BRENT DOUGLAS
CLEATOR, BRENT DOUG	Preferred	BRENT
CLEATOR, BRENT DOUG	Report name	BRENT
CLEATOR, BRENT DOUG	Report full name	BRENT CLEATOR
DOWD, BRENDAN JAME	First Names	BRENDAN JAMES
DOWD, BRENDAN JAME	Preferred	BRENDAN
DOWD, BRENDAN JAME	Report name	BRENDAN
DOWD, BRENDAN JAME	Report full name	BRENDAN DOWD
FAITH, BRENDON KEVIN	First Names	BRENDON KEVIN
FAITH, BRENDON KEVIN	Preferred	BRENDON
FAITH, BRENDON KEVIN	Report full name	BRENDON FAITH
FAITH, BRENDON KEVIN	Report name	BRENDON
ROBINSON, BRENDON M	First Names	BRENDON MUNRO
ROBINSON, BRENDON M	Preferred	BRENDON
ROBINSON, BRENDON M	Report name	BRENDON
ROBINSON, BRENDON M	Report full name	BRENDON ROBINSON
SUTTON, BRENT GARY	First Names	BRENT GARY
SUTTON, BRENT GARY	Preferred	BRENT
SUTTON, BRENT GARY	Report name	BRENT
SUTTON, BRENT GARY	Report full name	BRENT SUTTON

Figure 30: Selecting from the 'Fast find' list

Now you can either press 'Set filter to displayed students' - to return to the main screen with just your selected students displayed click 'Print the selected entries' - in which case a list of the selected entries will be printed off.

Student /	Year	Class	Room	Status
CORMIER, Rod	9		FC3	Full time
DACH, Damon	9		FC2	Full time
MARVIN, Robin	9		FC2	Full time
MORIORO, Hubert	8		FC2	Full time
REILLY, Nannie	9		FC1	Full time
ROLFSON, Abdullah	9		FC1	Full time
ROLFSON, Emilee	11		FC3	Full time
ROSENBAUM, Gust	10		FC4	Full time

Figure 31: Just the 'found' students

## 8.4 The information panel

Below the buttons is a panel with details relating to the currently displayed students and the database being accessed. An example of the panel is shown below.

Full time	Part time	Pre-enrol	Leaver	Delete	Unknown	Filter Total
6	0	0	0	0	0	6

Total students : 6 / 20  
Current database : D:\Ministry School\CM\cm.mdb  
Current Filter: Sports team

Figure 32: The information panel

There are 22 students in the database; four of those displayed are full-time students and one of them is a leaver.

The main database and its paths are c:\cm\cm.mdb  
The currently displayed filter is 'Full time and Part time students'

In the bottom right corner of the panel is a small box. You can search for a particular student in the list on the right side by typing the first few letters of his/her family name. The display will identify the first student matching the letters you have typed, and these letters will be displayed in the small panel. You can back-space to remove an existing search. Once you have found a particular student you can move to the view/edit area by double-clicking on their name or clicking on the main view/edit button.

## 8.5 MUSAC ENROL Utility from ENROL/LMS button

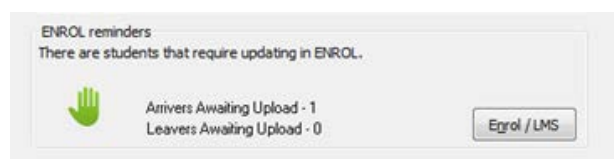


Figure 33: ENROL Utility

The MUSAC ENROL Utility is installed via the same Mega-Installer used to update or install MUSAC Classic Suite. The overall goal is to keep the School Roll in Student Manager as closely synchronized with ENROL (the MoE's register) as is possible. The MUSAC ENROL Utility is provided to facilitate this process and reduce the amount of double data-handling. As the student's NSN is used to link the student in Student Manager with their record in ENROL, the 'Get/Check NSN' must be fully implemented in the school.

**Note:** The ENROL Utility is only available to those with Administrator access. The Microsoft.Net 3.5 Framework is also required for this Utility. You can manually download .Net 3.5 here: [Download Microsoft .Net 3.5 framework](#). Our ENROL Utility uses the MoE's WSS Wrapper to communicate with ENROL. The Wrapper and installation instructions can be downloaded from the MUSAC website ([www.musac.co.nz](http://www.musac.co.nz)). Please ensure this is installed and operating correctly before attempting to use the ENROL Utility. Please refer to the MUSAC eRoll Returns User Manual for further assistance with installation and trouble-shooting. There is a separate User Guide for MUSAC's ENROL and LMS Utilities which will also be available from our website.

The Utility is provided to:

- 1 remind the Student Manager Administrator to upload all new enrolments to ENROL once they have started attending the school.
- 2 remind the Administrator to upload the required leaver information to ENROL once the student has left the school.
- 3 facilitate the upload process, by creating the messages containing the student data that requires uploading to ENROL using the data already held in Student Manager, for the students selected from a list (the 'SyncList').
- 4 inform the Administrator of the success or failure of the upload and clearly indicate what should be done to fix any errors.

## 8.6 Selecting or creating another database

Student Manager allows you to look at the students in a different database, for example accessing the leavers file. All databases found in your \CM directory will be listed along with the number of students in each. To transfer to a different database, select it from the list displayed. You will be asked to confirm switching, then be returned to the main screen where the students will be displayed. (If you select a leavers database and return to the main screen where your filter currently excludes leavers then you will probably see no students. If so - visit the filter setting process and reveal your students).

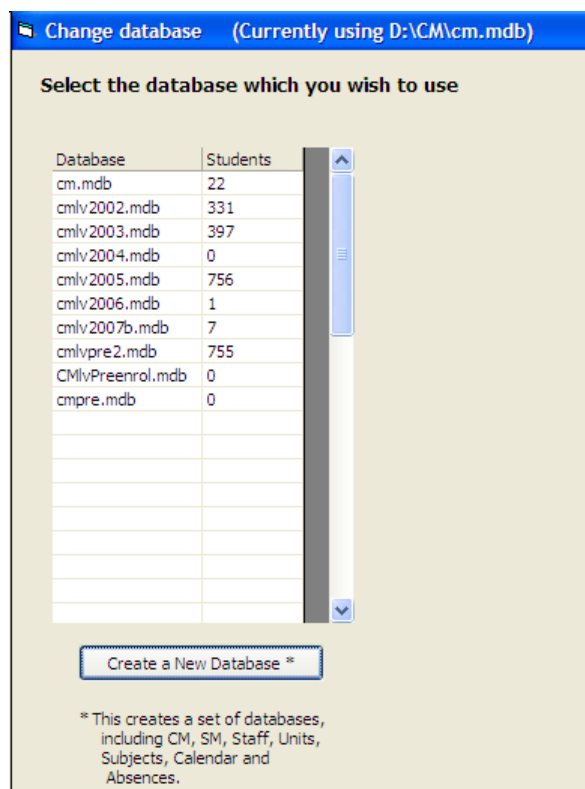


Figure 34: Selection of the database

Alternatively to create a new database of your own click on 'Create a new Database' and the window will display some further alternatives, shown below.

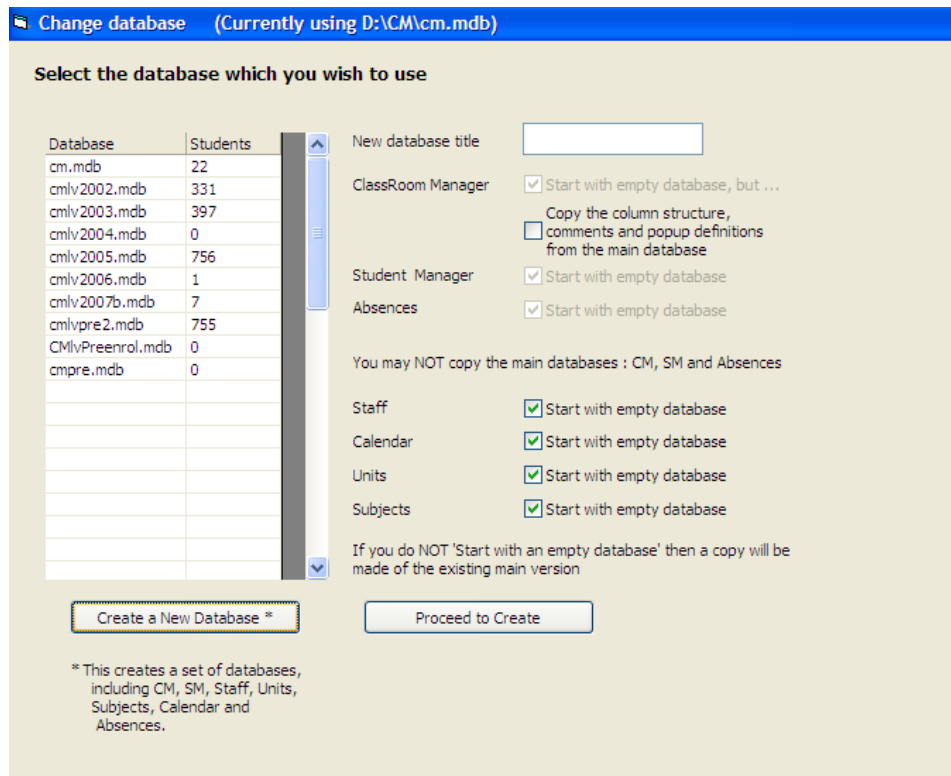


Figure 35: Creating a new database

Give your new database a 'simple' name and make the various selections displayed on the screen. Be aware that this process will actually generate SEVEN new databases, similar to the seven which currently comprise Student Manager, but named according to the name you have supplied. You can then select and change to your new database. This time you should CERTAINLY see no students when you return to the main screen.

Please do NOT create databases for your leavers. The database(s) for these are automatically created when you transfer students to the leavers database under the 'Utilities' process for this purpose.

## 9 Viewing/Editing Student Data

Data editing is done via the documents (screens) in the software.

The screenshot shows a software window titled "Student Manager version 11.9.38 17/11/2011 Administrator School Ministry School D:\Ministry School\CM\cm.mdb - [Personal details.dmt BRAK]". The main content area displays the "Personal details" document for a student named Stephen BRAKUS, currently in Year 9, Class Yr9, Room FC3. The form is organized into several sections:

- Personal details:** Fields for Legal Surname (BRAKUS), Preferred Surname, Legal Firstname (Stephen), Preferred Firstname (Stephen), Middle Name, and an "Other personal details" button.
- Family details:** A "Family details" button.
- Residential Address (No P.O. Box or Private Bag):** Fields for Address 1 through Address 5, and an "Address Info Withheld (MoE Privacy Indicator)" checkbox. A "Mailing details" button is also present.
- Contact Information:** Fields for Home phone (3565897), Student's phone (3547894), and Student's email (brakuss@hotmail.com).
- Register details:** A section for "This year" and "Next year" with fields for Year (9, 10), Class (2012 Yr9), and Room (2012 FC3). It also includes fields for Teacher/Dean and House.
- Local student ID:** Fields for ID (30800015), Type (International Exchange), Status (Full time), and Nat. Student Number (1248124817). A "Get/Check NSN" button is located below.
- Enrolment details:** Fields for Date of birth (11/11/1998), Age at Jan 1 (12.01.21), Age at today (13.00.12), and Enrolment number (07/015). An "Enrolment details" button is present.
- Ministry details:** A "Ministry details" button.
- Maori details:** A "Maori details" button.

At the bottom of the form, there are buttons for "Medical", "Caregiver details", "Options", "Pastoral", "Sensitive", "Financial details", and "Timetable". The window footer includes a navigation bar with "Add", "Prev", "Next", "Print", "View", "Alarms", "Filter", "Page 1/1", "Page >", "Help", and "Close" buttons.

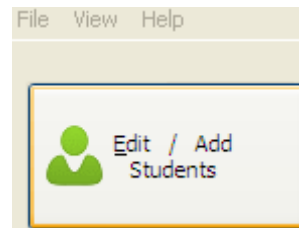
Figure 36: The 'Personal details' document

Two versions of each are supplied. You can also design your own documents. We recommend 1024x768 screen setting as this facilitates more information on a screen.

It is not possible to display the same amount of information at lower resolutions. The result would be that more screens are required, with the need to move between screens more frequently.

### 9.1 General editing processes – document mode

To access the view/edit area, click on the view/edit button in the top left corner of the main screen.



If you have no student selected from the list on the main menu screen then you will enter the editing process at the first student. If you have selected a student, it is his or her data which will be displayed when you enter the editing screen.

Alternatively, you can identify a particular student on the main menu list (by typing the first few letters of his or her surname), then enter the view/edit process by double-clicking on the student's name in the list.

If you arrive at the view/edit screen and no documents are displayed then this will reflect the fact that you have not previously selected any documents for your personal use. The process of selecting these is described under the 'Figure 43: The document selection screen'.

The main screen is divided into several areas. On the left side of the screen is the document navigation and selection area, shown below.

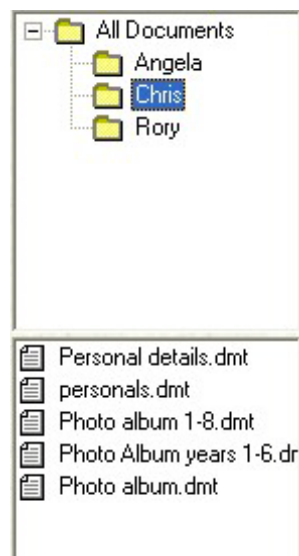


Figure 37: The document selection area

The top part shows the various document subdirectories which you might have created. There is one main directory (referred to as 'All documents'). If you click in the small box to the left of this (showing a '+' sign) then any subdirectories to which you have access will be displayed. Also in this area your dossiers if any will be displayed. None are shown in the Figure above.

In the second part of the panel displayed is a list of the documents contained in the directory or dossier which you have open. In the case of the main directory, only those documents which you have requested to appear (or to which you have been given access) will be listed.

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At the foot of the Edit/Add Students main screen is a row of buttons and controls which provide extra features including the student navigation tools.

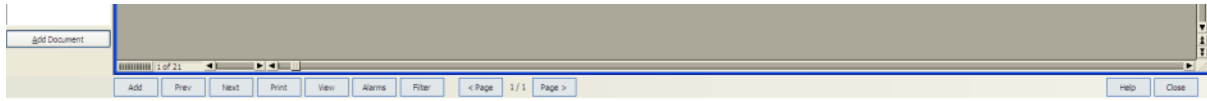


Figure 38: Navigation and other controls from Edit/Add Students

From here you can add a new document, detailed separately.

The next button has several rows of dots. This leads you to 'Grid mode' - via which you can edit the data shown in the current document via a grid, or spreadsheet. The next '1 of 21' shows you the number of the current student within the list of currently filtered students.

Next are left and right arrow buttons. These move you to the previous student and the next student alphabetically respectively. The process of moving to another student follows.

The horizontal slide for use moving the document around the screen becomes important when your document does not all fit on the visible display area. In the case of the supplied documents we've used a document size which will always fit on the screen. There is a matching vertical slide down the right hand edge of the screen.

The rest of the main screen is devoted to the document display. It is via these documents that you enter student's data.

Student : Stephen BRAKUS		Year : 9 Class : Yr9 Room : FC3	
Legal Surname	BRAKUS	<b>This year</b>	
Preferred Surname		Year	9
Legal Firstname	Stephen	Class 2012	Yr9
Preferred Firstname	Stephen	Room 2012	FC3
Middle Name		Teacher / Dean	
Other personal details		House	
Family		Register details	
Family details		Local student ID	30800015
Residential Address (No P.O. Box or Private Bag)		Type	International Exchange
Address 1	Address 1	Status	Full time
Address 2	Address 2	Nat. Student Number	1248124817
Address 3	CITY	Get/Check NSN	
Address 4		URL:	URL not set
Address 5		Ministry details	
Address Info Withheld (MoE Privacy Indicator)			
Mailing details		Enrolment details	
Home phone	3565897	Maori details	
Student's phone	3547894		
Student's email	brakuss@hotmail.com		
Medical		Caregiver details	Options
Sensitive		Financial details	Timetable
Pastoral			

Figure 39: A student's personal details data entry document

In addition to all of these there are several 'hot keys' you can use during editing. These are :

- PageDown moves you to the next document in the left hand side display.
- PageUp moves you to the previous document in the left hand side display.
- Alt-N move to the next student alphabetically
- Alt-B move to the previous student alphabetically
- Alt-H Home - move your current document back to its original position in the top left hand corner of the display.
- Alt-P Print - This has the same effect as clicking on the print button at the top of the screen. It leads you to the printing process via which you can print documents.
- Alt-R Refresh - redisplay the current document. From time to time, in spite of our best efforts, you may overlay items on a screen which, when removed leave a 'hole'. Alt-R will repair the damage.
- Alt-S Search - This is the easy way to move from one student to another. When you press Alt-S the student selection window will 'pop up'.

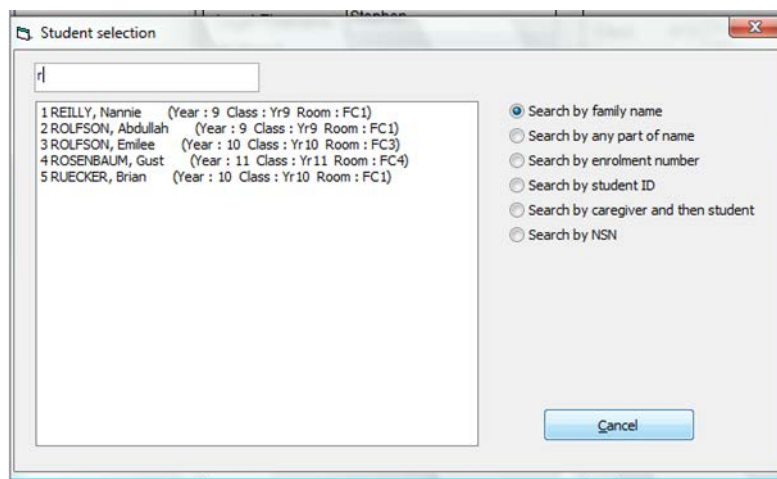


Figure 40: The student search window

Type in the first few letters of the surname of the student to display and all students matching this request will be listed, the first 9 with numbers alongside. You can either type the number of the requested student or click on their name. The previous screen displays with the selected student's data. You can also search for any part of a student's name, an enrolment number, or a caregiver's name – first name or family name.

If you have multiple sections of the program open (editing / financials / pastorals) then searching and selecting for a new student in any of these will cause the same student to be selected in any other open sections.

The various data entry screens (documents) follow, from the foot of the screen.

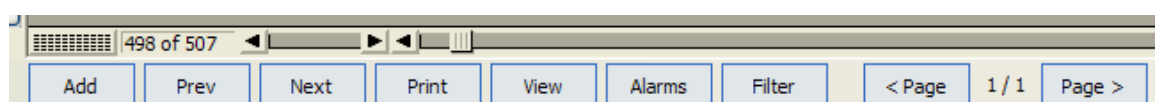


Figure 41: Features at foot of screen

*Adding new students*

*Previous and following student*



### Print

See Printing button from the main Student Manager menu.

### View

This provides access to three screens dealing with what you can see now.

## 1 Document selection

This is done via the screen below. Each user will see his or her own selection of documents.

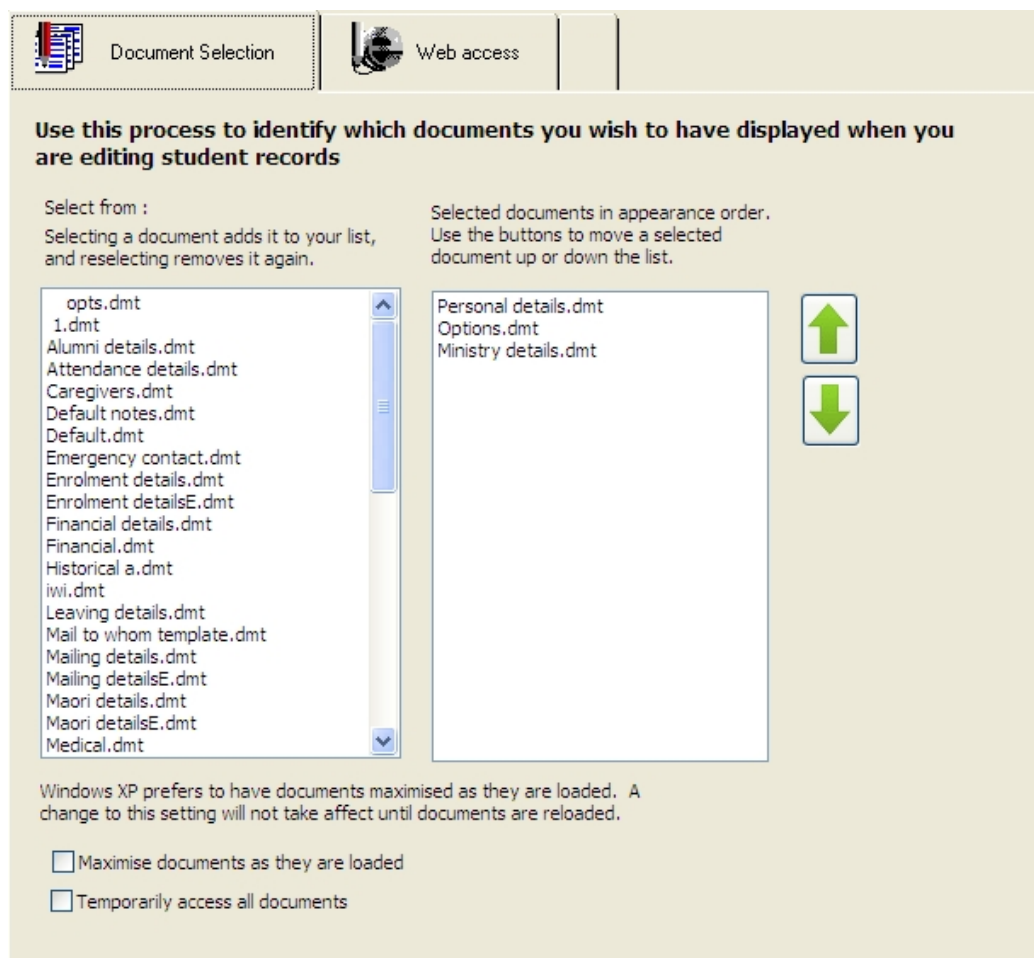


Figure 42: The document selection screen

The list on the left is all those documents currently available for display during student data entry. The right hand list displays those which you, personally, have current access to.

Click on a document on the left to add it to the right hand list. Reselection (from the left hand list) removes it from the right hand list.

You can adjust the order of the documents in the right hand list by selecting one and using the up and down arrows to move it up or down the list. This is the order in which the documents will appear back on your main screen and the order in which PageUp and PageDown will move you through the documents.

**Note:** You do not have to display all documents in order to access them. For example, there is a document titled 'personal details 2.dmt'. This document is always accessible from the main 'Personal Details' document. It includes a button which will return you to the main document. The same applies to various other documents.

At the bottom of this screen is a very important choice for users of Windows XP. You will need to ensure that documents are maximised as they are loaded. If you do not do this then you will not be able to see the navigation buttons at the bottom of the screen.

You can also temporarily gain access to ALL documents.

## 2 Web Access



Figure 43: Access selected websites

Once connected to the internet, you can directly access the MUSAC web site, The Te Kete Ipurangi web site, by clicking on the logos on this screen.

**Note the message in red:**

If you download an update from the MUSAC web site then you may NOT install it while one or more of the programs in the package are currently open.

### *Restore your filter*

Should you have been into grid mode and filtered down to a smaller selection of the students with whom you originally arrived then you can use this button to return to your original filter.

The following message will be displayed....

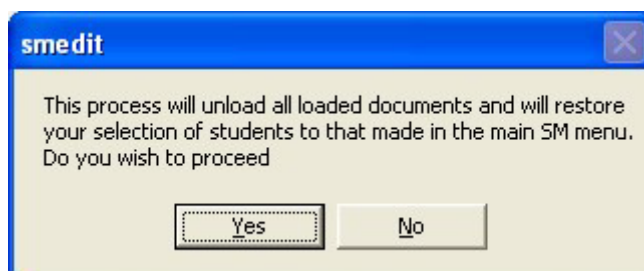


Figure 44: Filter restoration confirmation

### Help

This provides access to the help screens.

### Page up and down

The next two buttons allow you to page up and down through the various pages of a multi-page document. We have not provided any such documents in Student Manager. If you have created any of your own then these buttons will come into play.

### Exit

The preferred means of leaving this area. Any other means (eg. switching your computer off) is NOT a good idea and can damage the background databases. Please use this button to return to the main menu.

### Document menu

If you right-click on a document a popup menu will appear.

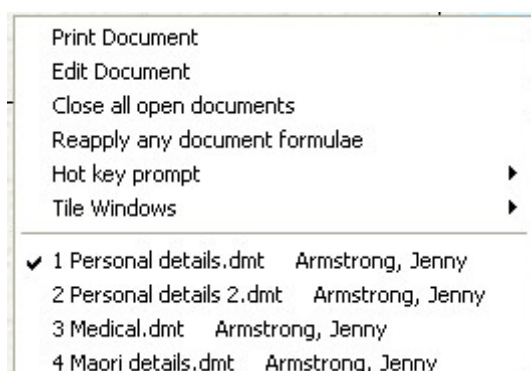


Figure 45: The document popup menu

This menu provides several facilities:

- 1 You can print the currently displayed document by clicking on the first item. The normal process of doing this is via the large 'Print' button at the top of the screen.
- 2 You can enter 'edit mode' on the current document. A later chapter is devoted to this topic.
- 3 You can close all documents which you currently have open. In Student Manager you can have several documents 'loaded' at once. In the menu illustrated above you can see, at the bottom of the menu, that four documents are currently loaded for this student.

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It is not a good idea to have too many documents open at a time since, as you move to another student, all of the open documents must be reloaded for the new student, and this can take time. The third menu option allows you to close all of the documents currently open.

- 1 The fourth allows you to re-apply all document formulae. It is unlikely that any formulae would be involved in the basic Student Manager data documents.
- 2 The Hot key prompt provides a summary of the special key functions listed earlier.
- 3 You can tile the currently open documents so that you can see a small section of each all at the same time.
- 4 Finally, the currently open documents are listed and you can bring any one of them to the 'top' (ie. make it visible) by selecting it here.

## 9.2 Grid mode

The first way to enter student data with which you have become familiar is via the individual documents. On the document screen is the 'Grid Mode' button.

Grid mode is the second method of entering student data. It has the characteristics of a spreadsheet. Each document has a 'grid mode' and an example, arising from the 'Personal details' document, is shown below.

Configure	File	Family name	First Name	Surname	Address 1	Address 2	Address 3	Address 4	Address 5	Home phone	Student's phone	Student's email	Year	Class
		BRADUE	EPOCH	Stephen	Stephen	Address 1	Address 2	CITY					9	PC1
		COMBER	RUI	Rodger	Rui	Address 1	Address 2	CITY					9	PC1
		DACH	DANON	Danion	Danion	Address 1	Address 2	CITY					9	PC1
		DACH	ODE	Ode	Ode	Address 1	Address 2	CITY					9	PC4
		DAVIS	JANIS	Janis	Janis	Address 1	Address 2	CITY					10	PC1
		EGARD	ALBERT	Albert	Albert	Address 1	Address 2	CITY					10	PC1
		FAUZI	LEWA	Lewa	Lewa	Address 1	Address 2	CITY					9	PC1
		JONES	JANNA	Janina	Janina								10	
		JONES	JOHN	John	John								10	
		JONES	JOSEPH	Joseph	Joseph	Address 1	Address 2	CITY					11	PC4
		LABI	SAMANTHA	Samantha	Samantha	Address 1	Address 2	CITY					9	PC1
		MARVIN	ROBIN	Robin	Robin	Address 1	Address 2	CITY					9	PC1
		WILLS	NINA	Nina	Nina	Address 1	Address 2	CITY					10	PC1
		HOBARD	HUBERT	Hubert	Hubert	Address 1	Address 2	CITY					9	PC1
		RACI	BERT	Bert	Bert	Address 1	Address 2	CITY					10	PC1
		KELLY	NINA	Nina	Nina	Address 1	Address 2	CITY					9	PC1
		ROYSON	ASHLEY	Ashley	Ashley	Address 1	Address 2	CITY					9	PC1
		ROYSON	EMMA	Emma	Emma	Address 1	Address 2	CITY					11	PC1
		ROSENBAUM	GUY	Guy	Guy	Address 1	Address 2	CITY					10	PC4
		RUECKER	BRIAN	Brian	Brian	Address 1	Address 2	CITY					10	PC1
		SAUFORD	HIRU	Hiru	Hiru	Address 1	Address 2	CITY					9	PC1

Figure 46: Grid mode

Down the left hand column are the names of the students currently available to you. Across the top are the names of the columns. These correspond to the data-entry fields of the document via which you entered grid mode.

In the centre of the screen is the data relating to the students and columns.

Across the bottom (and down the right side) of grid mode are slide bars which allow you to move around the display.

To enter data click in the 'cell' where you wish to enter data. If the column concerned is a text, number or date column then you can enter the information directly.

If the column is a 'popup' column then, as shown below, the relevant list of possibilities will pop up.

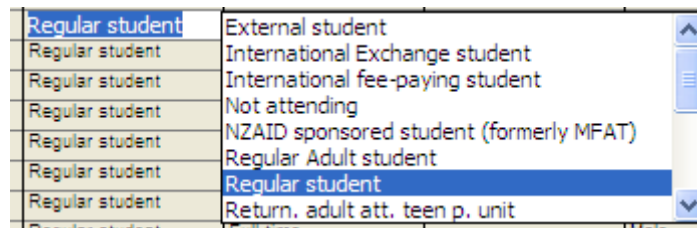


Figure 47: A pop-up selection

You can move from column to column using the up and down arrows to move vertically and the Ctrl ← and → arrows to move horizontally. (The left and right arrows by themselves move you left and right within the data you are entering.)

If you right-click in a particular column heading then the following menu providing access to possibilities including sorting.

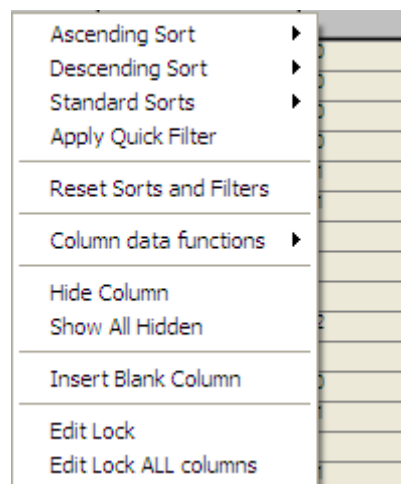


Figure 48: The Column menu

Ascending and Descending sorts can be alphabetical or numerical. The third sorts eg. boys and girls separately, ascending or descending according to year or room etc. These are explained further behind the 'Explain these formats' menu option.

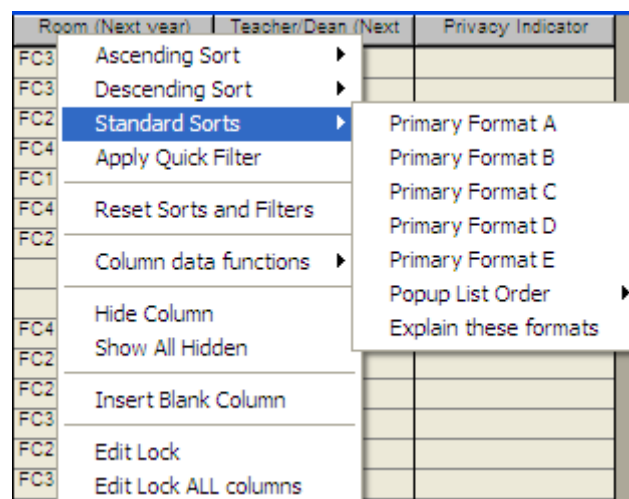


Figure 49: The possible sorts

Applying a quick filter allows you to identify those students whose data in the selected column matches a particular criteria. The type of filter you use depends on the type of column: text, numeric etc.

Three filters are shown below:

- The text and popup filter
- The date filter
- The numeric filter

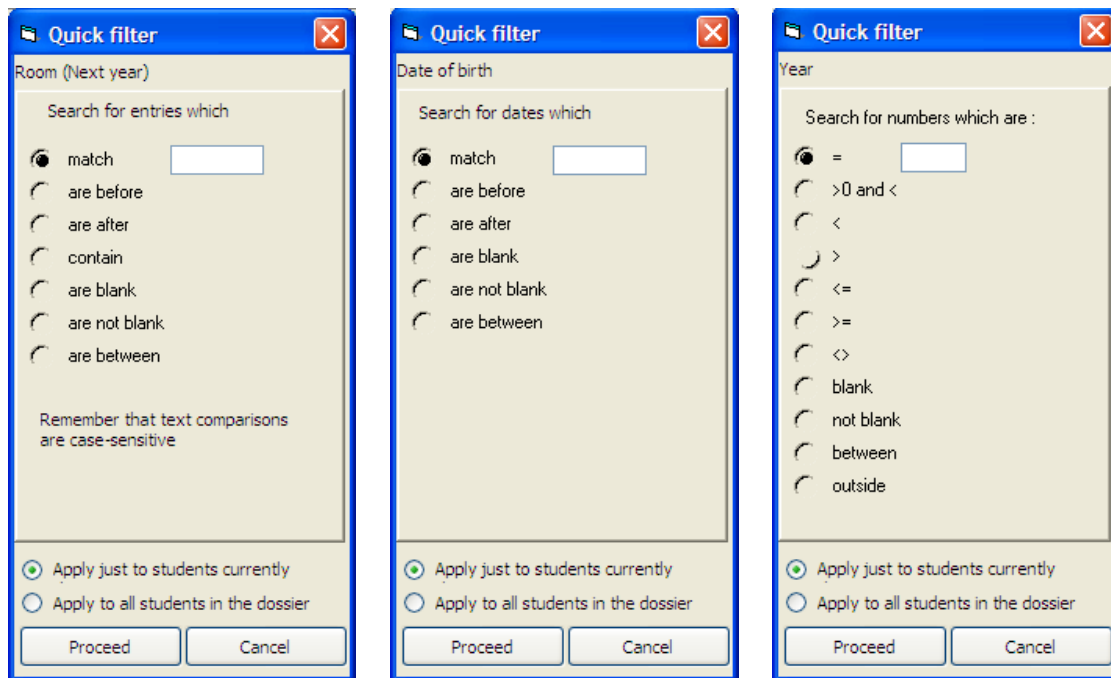


Figure 50: Three filters

The next menu item is 'Column data functions'. The first item here allows you to fill the selected column with data. Again, the offerings depend on the type of column. If it is a popup column, then you must select one of the entries from the relevant popup.

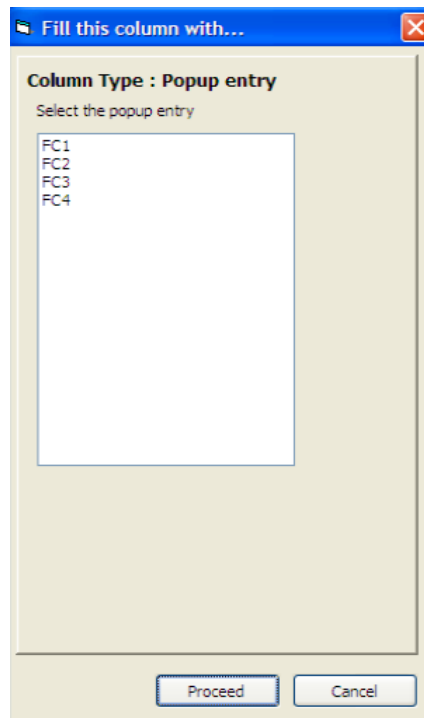


Figure 51: Fill a column with ...a popup entry

If its a numeric column then you have three choices:

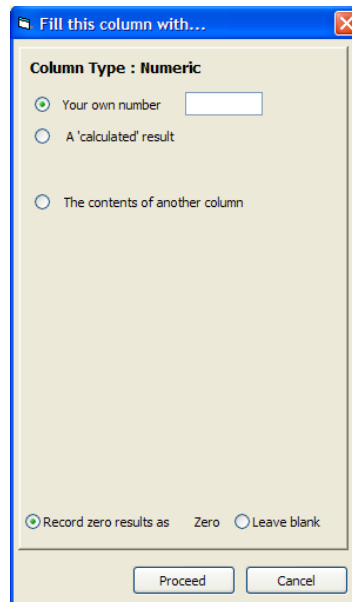


Figure 52: Fill a column with ... a number

The second possibility allows you to fill the column with a 'calculated' or 'derived' result - extracted via one of the many possibilities obtained via the 'multi- picker tool', one of the screens of which is shown below. Those familiar with entering information into the word processor will already have met this tool, the main screen for which is shown below.

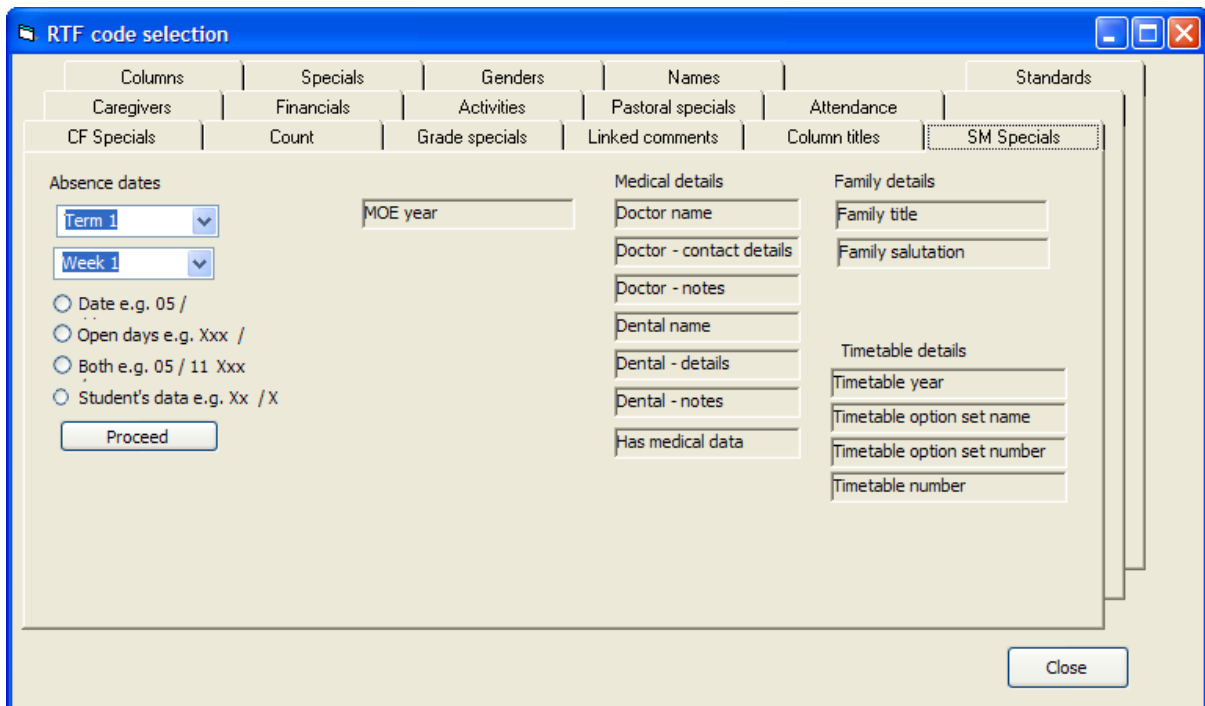


Figure 53: The insertion tool

Many primary schools will wish to view the students' MOE year values. That is available via the above screen. It is calculated for you, based on each student's 'Year at school' and 'Date started school'.

If you select the third possibility then the 'column picker tool' will appear via which you can select another (in this case) numeric column, and the data in that column will be copied into your current column.

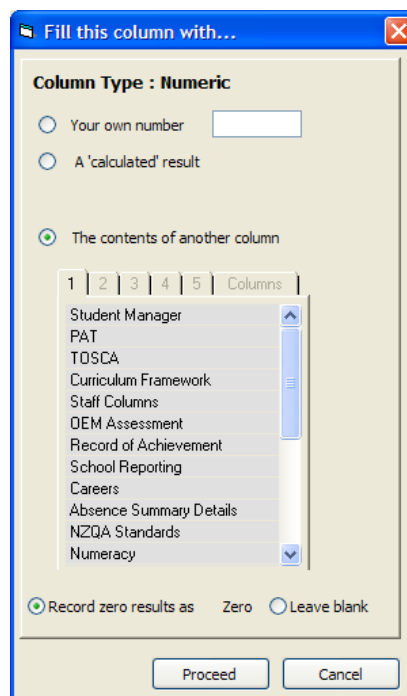


Figure 54: Fill a column with ... the contents of another column



If your column is a text column then you have several possibilities as shown below.

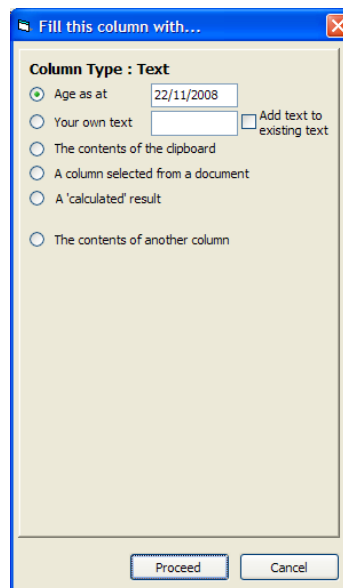


Figure 55: Fill a column with ... text

'Age as at' is in the format yy.mm - years and months. You can type in your own text, and can also have that added to any text already existing in the column. The third possibility is to fill the column with the current contents of the Windows clipboard. The other three possibilities will also make sense to you, now that you have read the 'Calculated' result and 'Other column' explanations above.

If you elect to 'Clear the contents of the column' you will be asked to confirm your intentions. We don't want columns being cleared enthusiastically without consideration. The following message will appear.

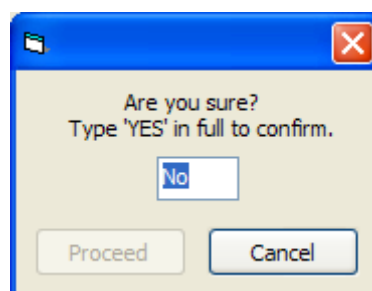


Figure 56: Clearing a column

The second possibility on the 'Column data functions' menu is to apply a formula to a column. There are several possibilities, depending on the type of column selected. These are covered in full in Classroom Manager. For example – the formula to convert data from one column to related data in another.

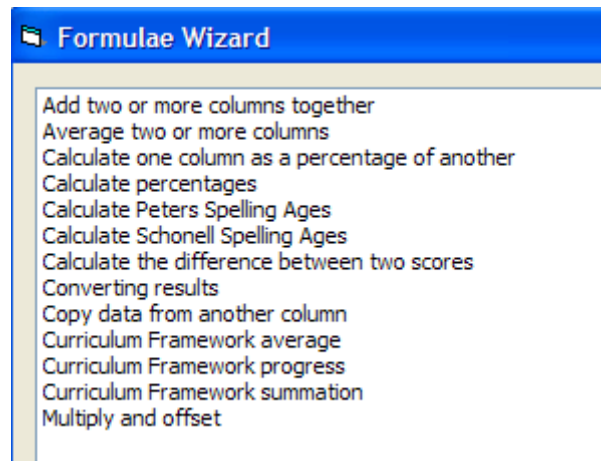


Figure 57: Selection of the formula required

'Converting results' allows you to fill a column with various results depending on the data in a second column. If you select this formula then the first step will be to select the 'Source' (or 'other') column - the one holding the original data.

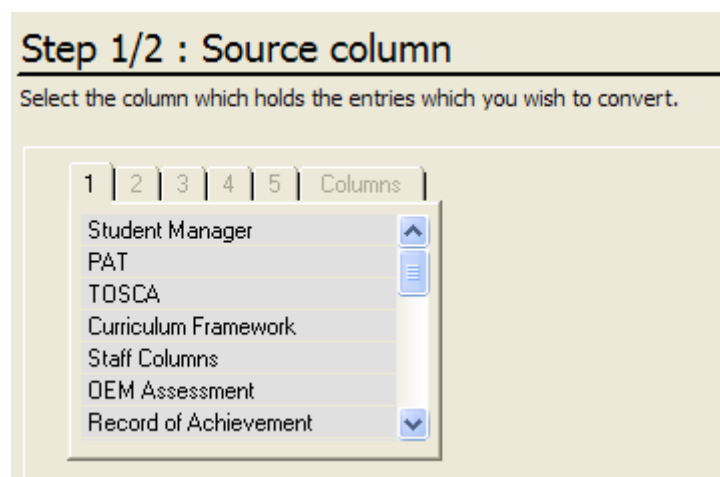


Figure 58: Selection of the 'source' column

Let's assume that I've selected the student age, and that I wish to fill a column with 'Pre-teen', 'Teens' or 'Older' depending on the student's age. The following is the conversion process which I would enter.

### Step 2/2 : Conversion details

Please set up the conversion table on which to base the results.

Enter the details of your results conversion process

Convert from	Convert to
1 to 10	Pre-teen
11,12,13,14,15,16,17,18,	Teens
19 to 100	Older

'Convert from' may include :  
 single results e.g. 23.45  
 several results e.g. Red,Blue,Green  
 a range e.g. 5.0 to 9.9  
 the word 'else' this refers to any values not included above.

If you enter 'copy' against the 'else' condition then the existing data will be copied

'Convert to' should include just the desired result e.g. Yes or A or 1

Figure 59: Specification of the conversion details

Once you have completed the various steps of your selected formula your column will be filled with the relevant information.

The third 'Column data function' is the display of column statistics. If you select this then an overlay will appear at the bottom of the screen providing the number of entries, and the mean and standard deviation of the results in the columns. Click the 'OK' button when you have seen enough. Of course mean and standard deviation are a little pointless for text columns.

Bishop, Adam		11		
OK	Number	287	71	12
	Mean	10.76		
	Std.Dev.	1.32		

Figure 60: Column statistics

Other possibilities allow you to hide columns, show columns, or insert a blank 'separator' between columns.

The final two possibilities allow you to lock (or unlock) one or more columns. A locked column has a small lock in the top right hand corner of its heading and, if you attempt to enter data, the following message is displayed.

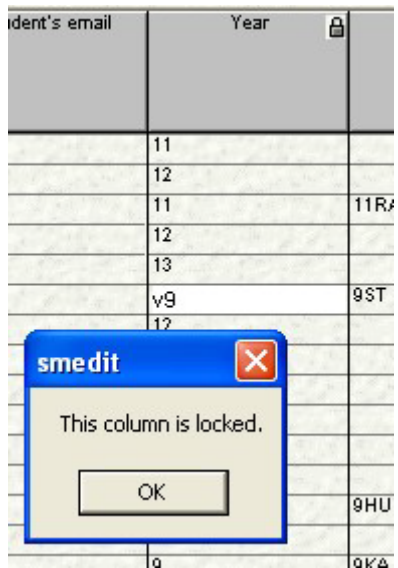


Figure 61 : Locking a column

The 'Filter' button, allows you to apply a further filter to those students to whom you already have access via the filter applied on the main menu. The filter screen is shown below for a wide number of possibilities by which to select students.

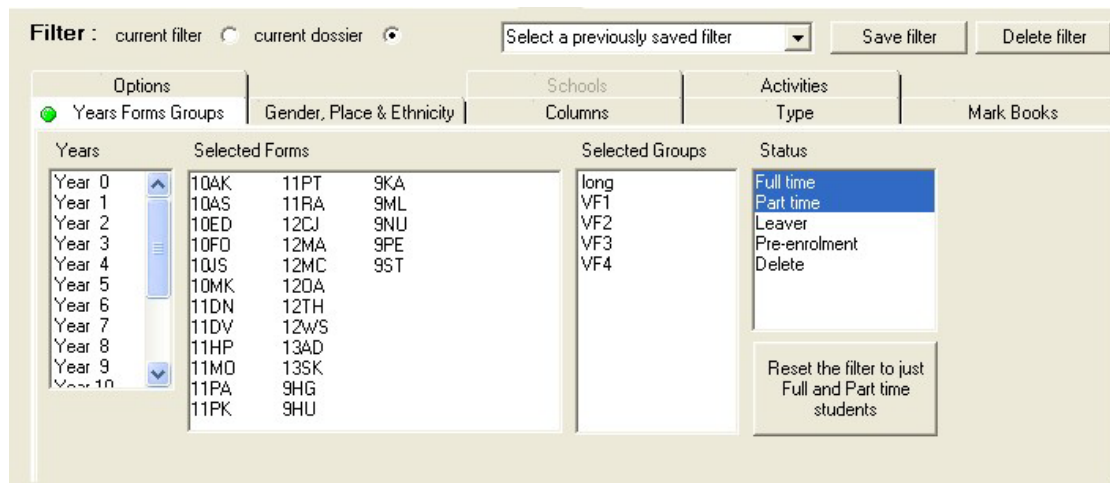


Figure 62: Applying a further filter

The first of the large buttons, 'Configure' leads you to the following screen, which has seven tabs across its top. The fourth tab is the filtering process, which we've just covered.

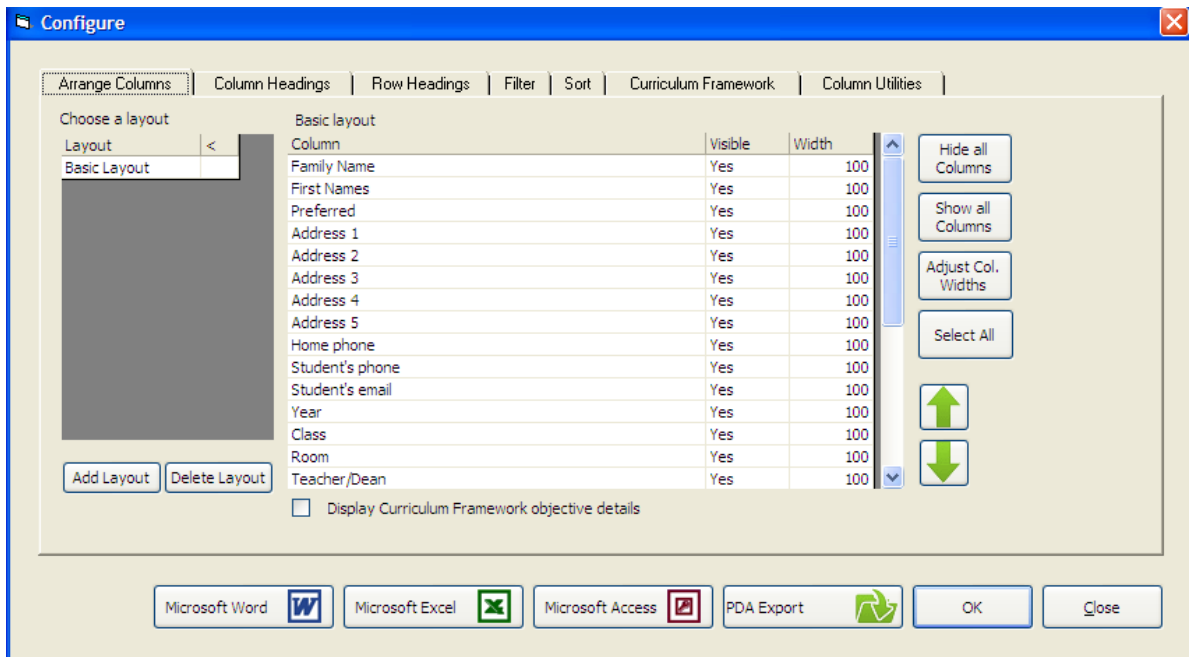


Figure 63: The 'Configure' screen

### Layouts

The first allows you to alter the arrangement, or layout, of the grid mode screen for the current document. You can, in fact, set up several 'Layouts'. In each you can adjust column widths, set the order of columns, and can hide (or show) certain columns. If you make changes then you will be asked to supply a name for your new 'layout' and it will then appear in the list on the left hand side, for future selection.

### Column headings

This section allows you to determine how much information is displayed in the column headings area.



Figure 64: The column heading options

### Row headings

This allows you to select the format of the students' names as they are to appear in grid mode.

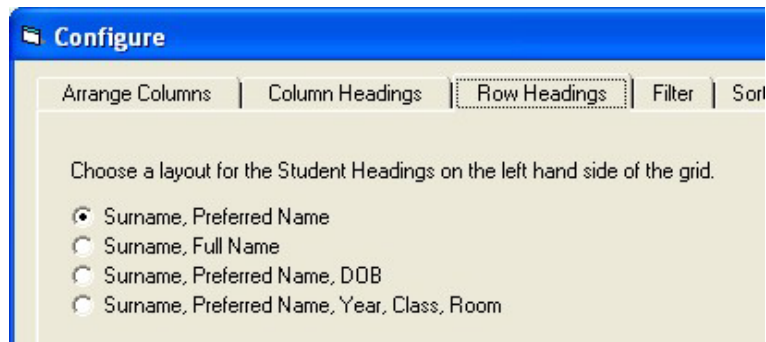


Figure 65: The row heading options

### Sort

Apply more complex sorts to the way students are displayed. The example below is sorted on the students' Family names (ascending) and, within each family name, Preferred name is sorted in descending order.

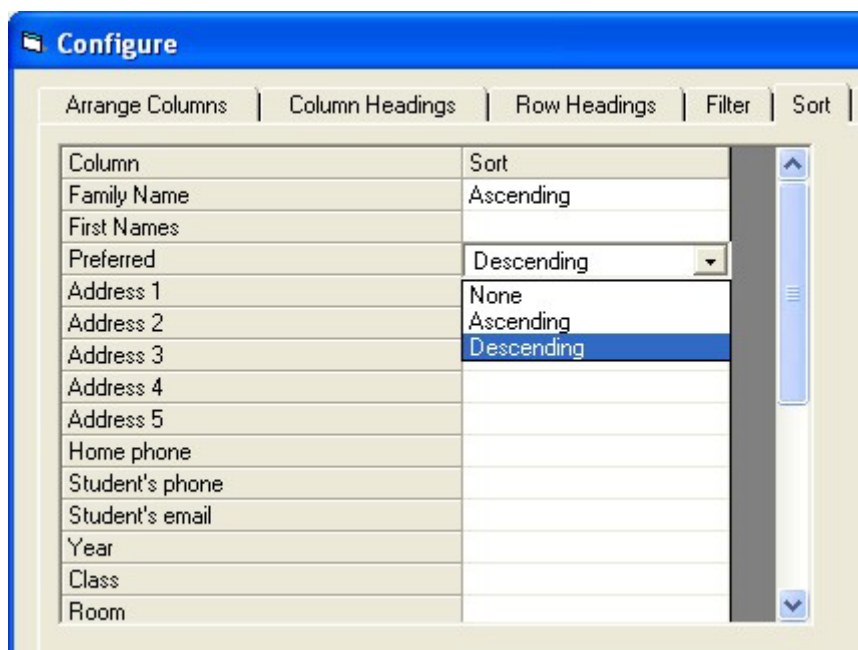


Figure 66: Sorting the columns

### Column utilities

Either globally remove data from several columns at once, or exchange two column formulae.

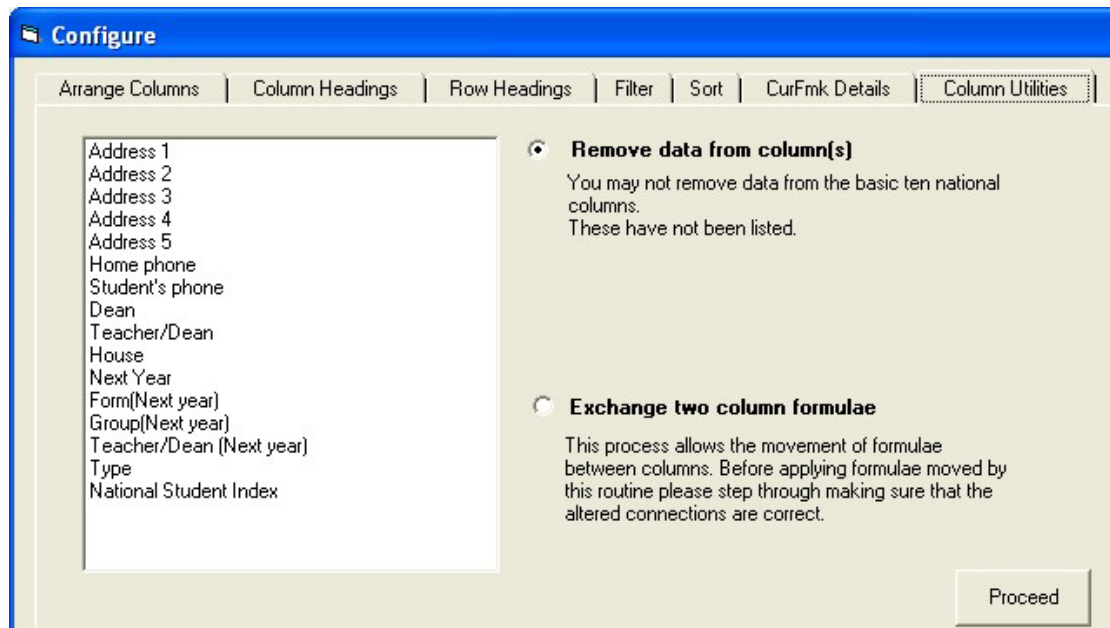


Figure 67: The column utilities screen

On the Configure screen export the data in all or selected columns - the Excel, to Access, to Microsoft Word or to a PDA (Personal Data Assistant).

You must specify the columns which you wish to export and....

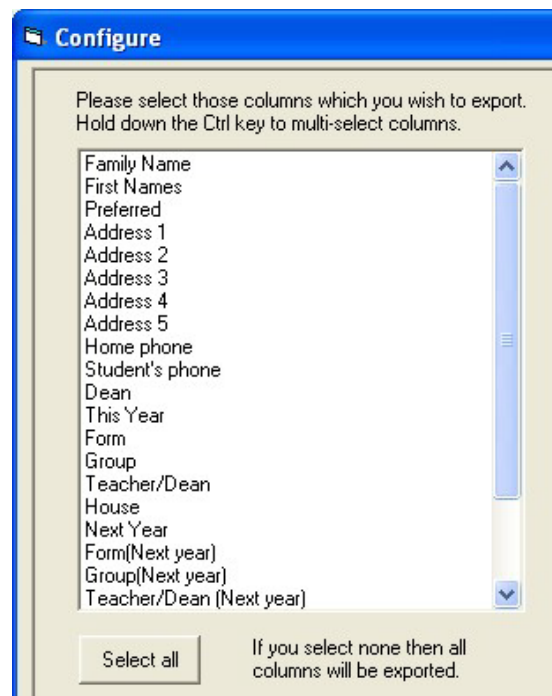
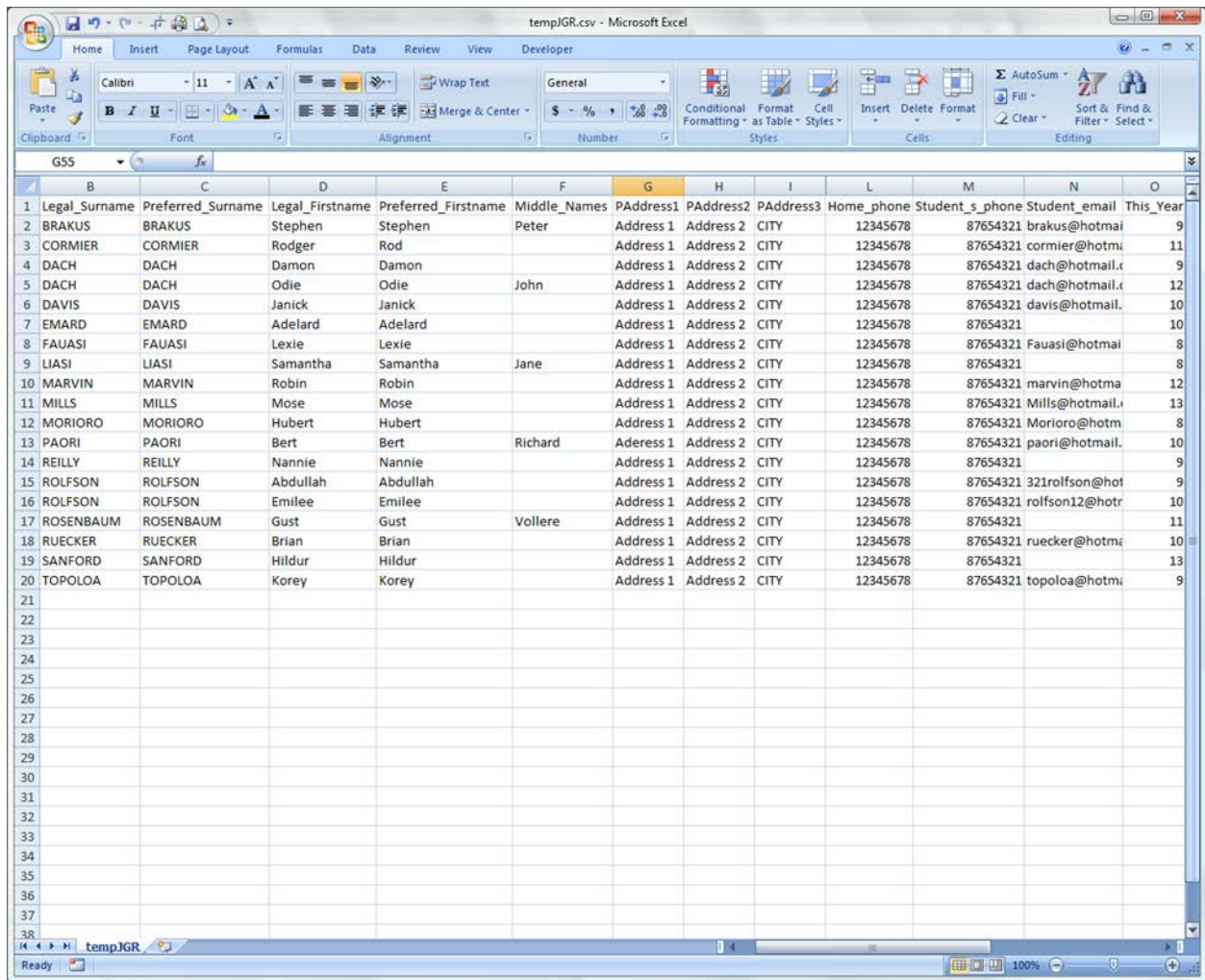


Figure 68: Selection of the columns to be exported

If you export the data to Excel, Excel will open with the exported data displayed, see example below.





	B	C	D	E	F	G	H	I	L	M	N	O
	Legal_Surname	Preferred_Surname	Legal_Firstname	Preferred_Firstname	Middle_Names	PAAddress1	PAddress2	PAddress3	Home_phone	Student_s_phone	Student_email	This_Year
2	BRAKUS	BRAKUS	Stephen	Stephen	Peter	Address 1	Address 2	CITY	12345678	87654321	brakus@hotmail	9
3	CORMIER	CORMIER	Rodger	Rod		Address 1	Address 2	CITY	12345678	87654321	cormier@hotmail	11
4	DACH	DACH	Damon	Damon		Address 1	Address 2	CITY	12345678	87654321	dach@hotmail.c	9
5	DACH	DACH	Odie	Odie	John	Address 1	Address 2	CITY	12345678	87654321	dach@hotmail.c	12
6	DAVIS	DAVIS	Janick	Janick		Address 1	Address 2	CITY	12345678	87654321	davis@hotmail.	10
7	EMARD	EMARD	Adelard	Adelard		Address 1	Address 2	CITY	12345678	87654321		10
8	FAUASI	FAUASI	Lexie	Lexie		Address 1	Address 2	CITY	12345678	87654321	Fauasi@hotmail	8
9	LIASI	LIASI	Samantha	Samantha	Jane	Address 1	Address 2	CITY	12345678	87654321		8
10	MARVIN	MARVIN	Robin	Robin		Address 1	Address 2	CITY	12345678	87654321	marvin@hotmail	12
11	MILLS	MILLS	Mose	Mose		Address 1	Address 2	CITY	12345678	87654321	Mills@hotmail.	13
12	MORIORO	MORIORO	Hubert	Hubert		Address 1	Address 2	CITY	12345678	87654321	Morioro@hotmail	8
13	PAORI	PAORI	Bert	Bert	Richard	Aderess 1	Address 2	CITY	12345678	87654321	paori@hotmail.	10
14	REILLY	REILLY	Nannie	Nannie		Address 1	Address 2	CITY	12345678	87654321		9
15	ROLFSON	ROLFSON	Abdullah	Abdullah		Address 1	Address 2	CITY	12345678	87654321	321rolfson@hotmail	9
16	ROLFSON	ROLFSON	Emilee	Emilee		Address 1	Address 2	CITY	12345678	87654321	rolfson12@hotmail	10
17	ROSENBAUM	ROSENBAUM	Gust	Gust	Vollere	Address 1	Address 2	CITY	12345678	87654321		11
18	RUECKER	RUECKER	Brian	Brian		Address 1	Address 2	CITY	12345678	87654321	ruecker@hotmail	10
19	SANFORD	SANFORD	Hildur	Hildur		Address 1	Address 2	CITY	12345678	87654321		13
20	TOPOLOA	TOPOLOA	Korey	Korey		Address 1	Address 2	CITY	12345678	87654321	topolooa@hotmail	9
21												
22												
23												
24												
25												
26												
27												
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29												
30												
31												
32												
33												
34												
35												
36												
37												
38												

Figure 69: Exported data in Excel



## 10 The Basic Documents

### 10.1 Overview

Through the Edit/Add Students screen, documents by MUSAC in the software look at the data entry processes and the links between these documents and other screens. The documents available are displayed on the left side menu of the view/edit screen, as shown below.

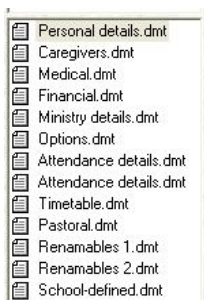


Figure 70: Your data entry documents

In several cases this has necessitated the addition of an extra screen to hold all of the information required.

### 10.2 Personal details

This screen contains several normal text entry fields (eg. Family name) and several popup fields (eg. Type, Status)


Student : Stephen BRAKUS		Year : 9 Class : Room : FC3																			
Family Name	<input type="text" value="BRAKUS"/>																				
First Names	<input type="text" value="Stephen"/>																				
Preferred	<input type="text" value="Stephen"/>																				
<input type="button" value="Other personal details"/>																					
Family	<input type="button" value="Family details"/>																				
Address 1	<input type="text" value="Address 1"/>																				
Address 2	<input type="text" value="Address 2"/>																				
Address 3	<input type="text" value="CITY"/>																				
Address 4	<input type="text"/>																				
Address 5	<input type="text"/>																				
Address Info Withheld (MoE Privacy Indicator) <input type="checkbox"/>																					
<input type="button" value="Mailing details"/>																					
Home phone	<input type="text"/>																				
Student's phone	<input type="text"/>																				
Student's email	<input type="text"/>																				
		<table border="1"> <thead> <tr> <th></th> <th>This year</th> <th>Next year</th> </tr> </thead> <tbody> <tr> <td>Year</td> <td><input type="text" value="9"/></td> <td><input type="text" value="10"/></td> </tr> <tr> <td>Class</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Room</td> <td>2008 <input type="text" value="FC3"/></td> <td>2009 <input type="text" value="FC3"/></td> </tr> <tr> <td>Teacher / Dean</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>House</td> <td colspan="2"><input type="text"/></td> </tr> </tbody> </table>		This year	Next year	Year	<input type="text" value="9"/>	<input type="text" value="10"/>	Class	<input type="text"/>	<input type="text"/>	Room	2008 <input type="text" value="FC3"/>	2009 <input type="text" value="FC3"/>	Teacher / Dean	<input type="text"/>	<input type="text"/>	House	<input type="text"/>		
	This year	Next year																			
Year	<input type="text" value="9"/>	<input type="text" value="10"/>																			
Class	<input type="text"/>	<input type="text"/>																			
Room	2008 <input type="text" value="FC3"/>	2009 <input type="text" value="FC3"/>																			
Teacher / Dean	<input type="text"/>	<input type="text"/>																			
House	<input type="text"/>																				
		<input type="button" value="Register details"/>																			
		<table border="1"> <tbody> <tr> <td>Local student ID</td> <td>30800015</td> </tr> <tr> <td>Type</td> <td><input type="text" value="Regular student"/></td> </tr> <tr> <td>Status</td> <td><input type="text" value="Full time"/></td> </tr> <tr> <td>Nat. Student Number</td> <td><input type="text"/></td> </tr> </tbody> </table>	Local student ID	30800015	Type	<input type="text" value="Regular student"/>	Status	<input type="text" value="Full time"/>	Nat. Student Number	<input type="text"/>	<table border="1"> <tbody> <tr> <td>Gender</td> <td><input type="text" value="Male"/></td> </tr> <tr> <td>Date of birth</td> <td><input type="text" value="11/11/1993"/></td> </tr> <tr> <td>Age at Jan 1</td> <td>14.01.21</td> </tr> <tr> <td>Age at today</td> <td>14.11.29</td> </tr> <tr> <td>Enrolment number</td> <td><input type="text" value="07/015"/></td> </tr> </tbody> </table>	Gender	<input type="text" value="Male"/>	Date of birth	<input type="text" value="11/11/1993"/>	Age at Jan 1	14.01.21	Age at today	14.11.29	Enrolment number	<input type="text" value="07/015"/>
Local student ID	30800015																				
Type	<input type="text" value="Regular student"/>																				
Status	<input type="text" value="Full time"/>																				
Nat. Student Number	<input type="text"/>																				
Gender	<input type="text" value="Male"/>																				
Date of birth	<input type="text" value="11/11/1993"/>																				
Age at Jan 1	14.01.21																				
Age at today	14.11.29																				
Enrolment number	<input type="text" value="07/015"/>																				
		<input type="button" value="Get/Check NSN"/>	<input type="button" value="Enrolment details"/>																		
		<input type="button" value="Ministry details"/>	<input type="button" value="Maori details"/>																		
		<input type="button" value="Medical"/>	<input type="button" value="Pastoral"/>																		
		<input type="button" value="Caregiver details"/>	<input type="button" value="Options"/>																		
		<input type="button" value="Sensitive"/>	<input type="button" value="Financial details"/>																		
		<input type="button" value="Timetable"/>																			

Figure 71: Personal details

If you enter a popup field then the popup menu for that field will be displayed, from which you can make your selection. If you type the first few characters of the entry which you wish to select then that entry will be automatically identified. Once this has happened press the <Enter> key and the full entry will be displayed. An example of such a field is shown below.

Figure 72: Popup field

You can use the up and down arrows to move between the fields. If you arrive at a popup field and you wish to make a selection then hold down the control key while using the up or down arrows and they will then work within the popup. Once you have identified your required entry, take your finger off the Ctrl key and the following up or down arrow will cause the selection to be recognised, and will move you to the next field.

There is one popup field which has a little extra functionality behind it – the ‘Status’ field. If you select ‘Leaver’ as a student’s new status then a small window will appear asking you to confirm their leaving details.

**Leaving details**

Please supply the following details for **CORMIER, Rod**

Date of leaving: 23/11/2011      Current debt: \$0.00  
 Year level on leaving: 9      NSN: 0117319058      Get / Check NSN  
 Status on leaving: Full time      Date started here: 22/05/2007

Highest NQF attainment \*  
 Highest Non-NQF attainment \*  
 UE \*  
 Leaving reason \*  
 School of destination \*  
 Intended region \*  
 Post school activity \*

\* Categories specified by the Ministry of Education

Teaching and learning notes  
 Academic       Behavioural       Health  
 Attendance       Custodial       Personal

Reason for status change  
 Update ENROL for leaver -  
 Update later       Update now

A tick will Indicate that Teaching and Learning Notes are available to be handed over.  
 The update to Enrol can be performed later, using the ENROL Leaver Utility.

Cancel (Restore Previous Status)      OK

Figure 73: The entry of leaving details

Changing a 'Leaver' back to 'Full time' or 'Part time' will ask the date on which they rejoined the school. This will be recorded in their register entries.

Please ensure that all details are completed correctly as this will save you considerable time when you produce your Ministry of Education returns.

Personal details 2.dmt MARVIN, Robin

Student : Robin MARVIN Year : 9 Class : Room : FC2

First name	<input type="text"/>	Languages spoken (other than English)	<input type="text"/>
Middle names	<input type="text"/>	Language spoken at home	<input type="text"/>
Initials	<input type="text"/>	Buddy/Mentor (This year)	<input type="text"/>
Preferred Surname	<input type="text"/>	Buddy/Mentor (Next year)	<input type="text"/>
Report name	<input type="text" value="Robin"/>	Place of birth	<input type="text"/>
Report full name	<input type="text" value="Robin MARVIN"/>		
Travel mode	<input type="text"/>		
Changes of school	<input type="text"/>		

Figure 74: Other personal details

### *Other personal details and links*

The first of these 'Other personal details and links' results in the screen above, where other personal details relating to each student are available. Use the extra fields available if you wish to record additional data.

There are also, on this screen, four other buttons which lead you directly to other data windows, which we shall meet later. Click 'Close' to return to your main 'Personal details' screen.

### *Family details*

For 'Family details', each family has a title, which defaults to the 'mail to whom' data of the eldest child in each family. You can, however, give the family any unique name which you prefer.

Family details for A'CANNAR, Martin Year : 11 Form : Tutor : PATK

A'CANNAR, Martin Year : 11 Form : Tutor : PATK

Family title: HC  
Salutation: Mr  
Prime caregiver: TL  
Comment: [Empty text area]

Select the 'prime' caregiver (i.e. the one whose address is the 'Family address')

Position in family: Eldest: Yes, Youngest: Yes  
Number of siblings (excludes 'me'): 0  
Place in family: 1

Family members: A'CANNAR, Martin (youngest) (eldest)

Future siblings	Name	D.O.B.	Enrol Date	Arrival Date	Comment

Buttons: Save Changes, Select an Existing Family for this Student, Create a New Family for this Student

Figure 75: Family details

Each student can only be a member of one family at a time, but students with different family names may be members of the same family.

To select an existing family for this student, click 'Select an Existing Family for this Student' and a list of existing families will be displayed from which you can make your selection.

To 'Create a New Family', click on the button at the bottom of the left side of the screen above. As you click on the 'Prime caregiver' area a list of all caregivers will appear in the middle of the screen. Select the caregiver whose address is to be that of this family.

Select a family for A'CANNAR, Martin Year : 11 Form : Tutor : PATK

- helle
- an
- rne
- ark J
- ette
- ce J
- lenni
- Cathleen E M
- en
- ellie
- cola
- n
- alee
- nelle
- ae
- oria
- Rowena M
- William
- R
- hris
- te
- M
- gina
- Angela
- BANDYAV E...

Buttons: Cancel

Figure 76: Select the prime caregiver for the family

Also shown on this screen are the current members of the family, along with their status - eldest, youngest or neither. This information for the current student, is also displayed in the top right

hand corner of the screen and you can have this information updated by clicking on the button there.

In the lower right of the screen is an information panel where you can record information relating to siblings of the current student who are not yet attending your school, but who may intend to do so in the future.

*Mailing details*

The next button on the main screen provides information relating to the student's addresses.

Student's Physical Address Preferred *		Student's Postal Address Preferred *	
(from Personal details)			
Mail to whom	Brendan Irvine A'CANNAR	Postal address 1	166 Morgan Street
Address 1	16 Bruadhead Avenue	Postal address 2	NEW PLYMOUTH
Address 2	NEW PLYMOUTH	Postal address 3	
Address 3		Postal address 4	
Address 4		Postal address 5	
Address 5		Postal code	
Postal code		Geocode	
Copy >		< Copy	
Mail to greeting			
<p>* In addition to the above addresses, each caregiver also has two addresses and in all cases you can indicate which of the two is 'Preferred'. Which one will be used when you design a document addressed to a caregiver? It depends. Click on the 'More information' button for a full description of the various possibilities and how the program works out which address to use.</p>		Send invoices to 'Mail to whom' (above)	Yes
		Send reports to 'Mail to whom' (above)	Yes
		* More information	
Close			

Figure 77: A student's alternative addresses

Each student can have both a mailing address and a physical address. For their TFEA survey, the Ministry of Education regularly requires information relating to the student's physical address. However, you might wish to use a different address as the student's main address.

At the bottom of the screen you can choose (for that student) whether you wish to use the postal or physical address when generating eg. statements.

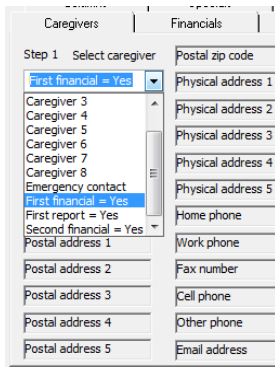
You can also tag the address for invoices and reports (as opposed to individual caregivers).

**Invoice and/or Statement address setup**

There are a range of choices in determining which caregiver's address will appear on an Invoice or Statement.

A new option has been provided for Invoices and Statements to reflect whether they go to the first or second caregiver who has their Invoices flag ticked. When setting up the document you can choose "First financial = Yes" on one document and "Second financial = Yes" on a second document.

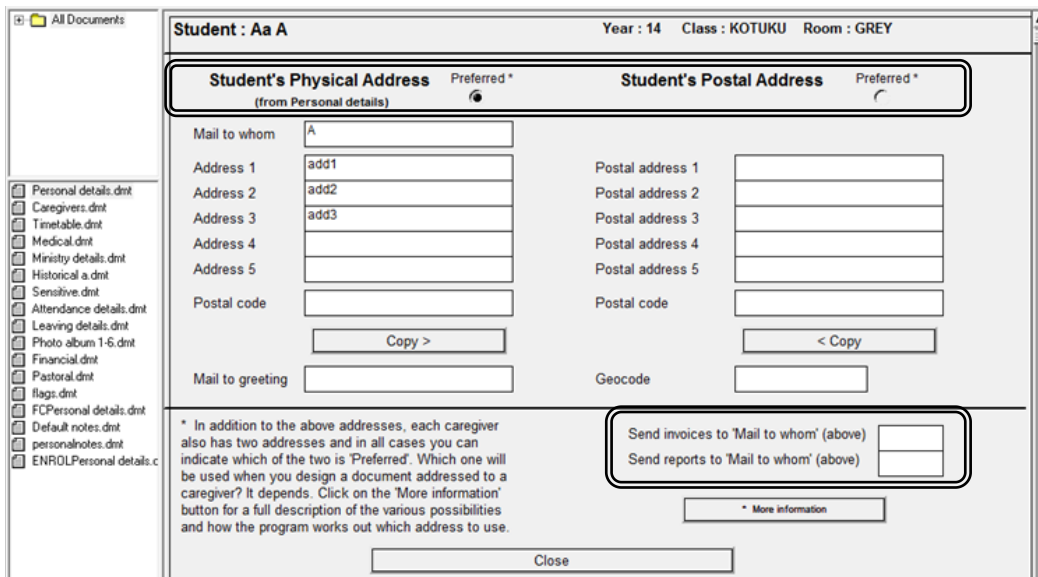
The first financial will go to the first caregiver who has their Invoices flag ticked and the second financial will go to the second caregiver who has their Invoices flag ticked.



The address which will appear on these documents depends on several options:

**Option 1:**

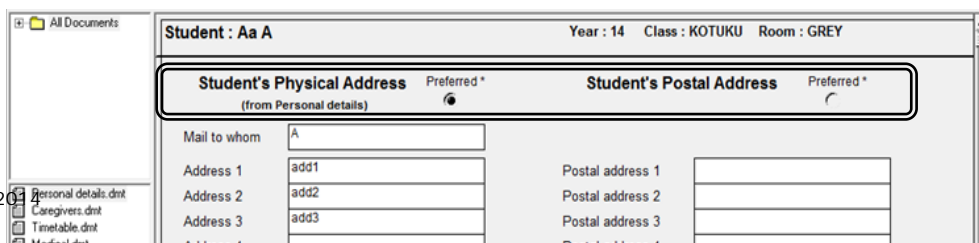
On the student's "Mailing Details" page, "Send invoices to "Mail to Whom" (above)" is set to "YES".



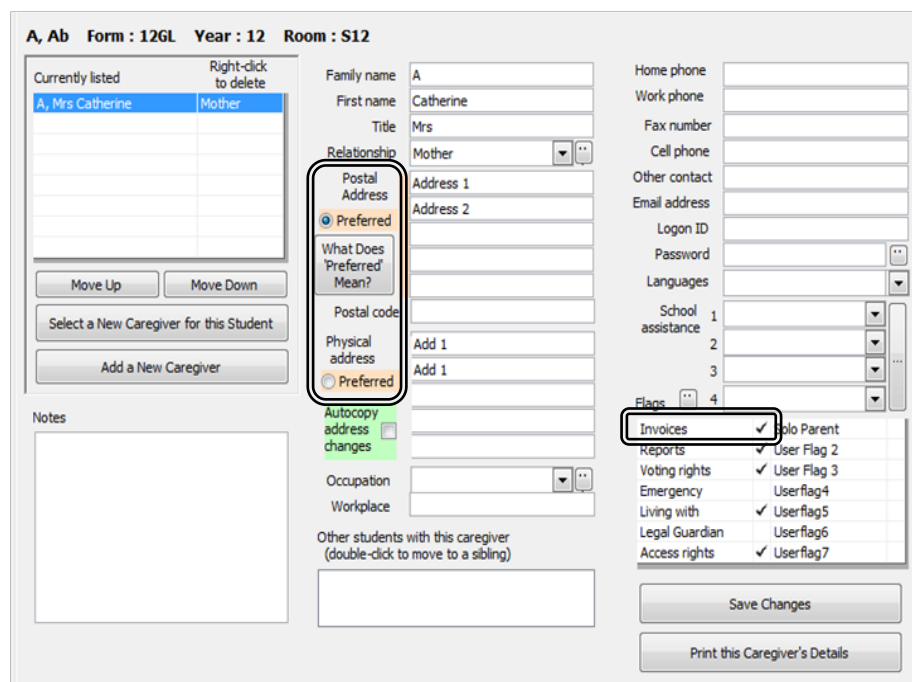
The program will look at the "Mailing Details" page only. If the preferred button is ticked to physical or postal then this will be the address used. (Note: if the preferred button is set to postal and there is no postal address then it will print blank, alerting the school to correct their data). If neither Preferred button is ticked then the physical address will be used for the Invoice or Statement.

**Option 2:**

On the student's "Mailing Details" page "Send invoices to "Mail to Whom" (above)" is set to "NO".



The program will look at the “Caregiver’s” page to determine which address to use for the Invoice or Statement.



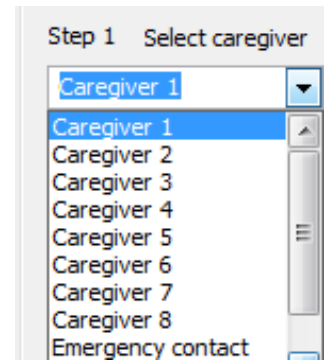
If the caregiver’s preferred address is blank then the program will default to the student’s “Mailing Details” page and use the student’s physical address for the Invoice or Statement.

**Option 3:**

Invoices and Statements have been setup for the “Individual Caregivers” (e.g. caregiver 1, caregiver 2, caregiver 3, caregiver 4, caregiver 5, caregiver 6, caregiver 7, caregiver 8).



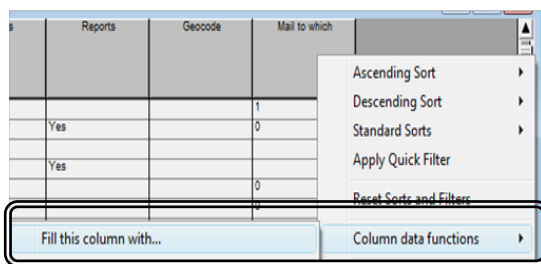
Any documents set up for "Individual Caregivers" will display whatever address fields have been selected regardless of the caregiver's preferred button or the student's "Mailing Details" page.



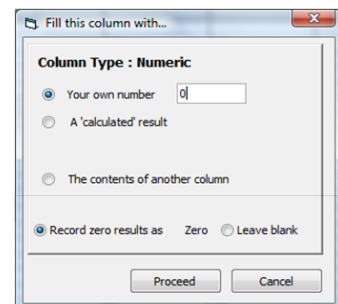
**Setting the preferred button on the "Mailing Details" page**

1. On the student's "Mailing Details" page click the "Grid mode" icon at the bottom of the page:
2. Click on the column named "Mail to which" (Usually the very last column)
3. Right- click on the header. Select "column data function" and fill the column with....."

Mail to which
1
0



4. Click on "your own number" and enter for "1" if the physical address is preferred or "0" if the postal address is preferred and then click "Proceed".





### Register details

Each time you change certain items of information concerning each student the details of that change are recorded in the register. The 'Register details' button allows you to view this information, shown below.

Date	Year	Form	Tutor	Status	Teacher	Opt set	Type	Started here	Leave date	Cha
15/11/2005				Pre-enrolme						
26/01/2006				Full time						
04/07/2006	9	9RD	0	0			RE	No entry	No entry	
07/07/2006	9	9RD	NRDK	Full time			RE	07/02/2006	No entry	Shir
02/01/2007	0			Full time	No Teacher		RE	2/07/2006		
02/02/2007	10		RLIS	Full time			RE	07/02/2006	No entry	Shir
02/02/2007	10	10WL	RLIS	Full time			RE	07/02/2006	No entry	Bet
05/02/2007	10	10WL	PWLR	Full time			RE	07/02/2006	No entry	Bet
20/02/2007	10	10MA	PWLR	Full time			RE	07/02/2006	No entry	Shir
20/02/2007	10	10MA	PMAR	Full time			RE	07/02/2006	No entry	Shir
25/01/2008	0	10MA	PATK	Full time	No Teacher		RE	2/07/2006		
29/01/2008	11		PATK	Full time			RE	07/02/2006	No entry	Shir

Figure 78: Register details for the current student

These details are used in Classroom Manager when you elect to enter student data 'as at a certain date'. You can then display those students who, for example, were in year 10 last year.

### Ministry details

This button leads you to the relevant document which has its own section later in this chapter.

### Enrolment details

The enrolment details screen displays a number of further details relating to the student's enrolment.

### Maori details

This screen allows you to record various details relating to a student's Maori background. (While those details displayed above are probably not a 'consistent set' - they illustrate the nature of the data which you can record.)

MoE ethnicities 1	Maori
MoE ethnicities 2	
MoE ethnicities 3	
Iwi 1	Ngāti Tūwharetoa
Iwi 2	Ngāti Porou
Iwi 3	
Ministry Details 2	

Figure 79: A student's 'Maori details'

Two other buttons allow you to proceed directly to the current student's medical and sensitive data screens. A 'red light' beside either indicates that the current student has information in one or both of these screens.

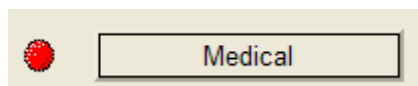


Figure 80: A 'Medic alert?'

If an address or telephone number is changed then the database is searched for others with the original address. The screen below reports the findings and allows you to have others with the same address or phone number changed at the same time.

**Student Manager address changes**

**Physical Address change**

The address shown has been found on the following other students and/or caregivers

Physical address :  
16 CARGILL STREET  
LEVIN

Select those which you wish to automatically update with changes made

Type	Address	Name
Student	Physical	ABBOTT, COLIN GEOFFREY
Caregiver	Physical	Mr ABBOTT
Caregiver	Postal	Mr ABBOTT
Caregiver	Physical	Mrs ABBOTT
Caregiver	Postal	Mrs ABBOTT

Select all

Proceed    Cancel

Figure 81: A changed address

### 10.3 Caregivers (including Caregiver Utilities)

In Student Manager each student can have eight caregiver screens and they are all displayed on a single screen, shown below.

This screen provides the basic 'urgent' information concerning the student's caregivers. To access full details of each caregiver, click 'Caregiver details' for a new window, used to record full details of each caregiver as shown below.

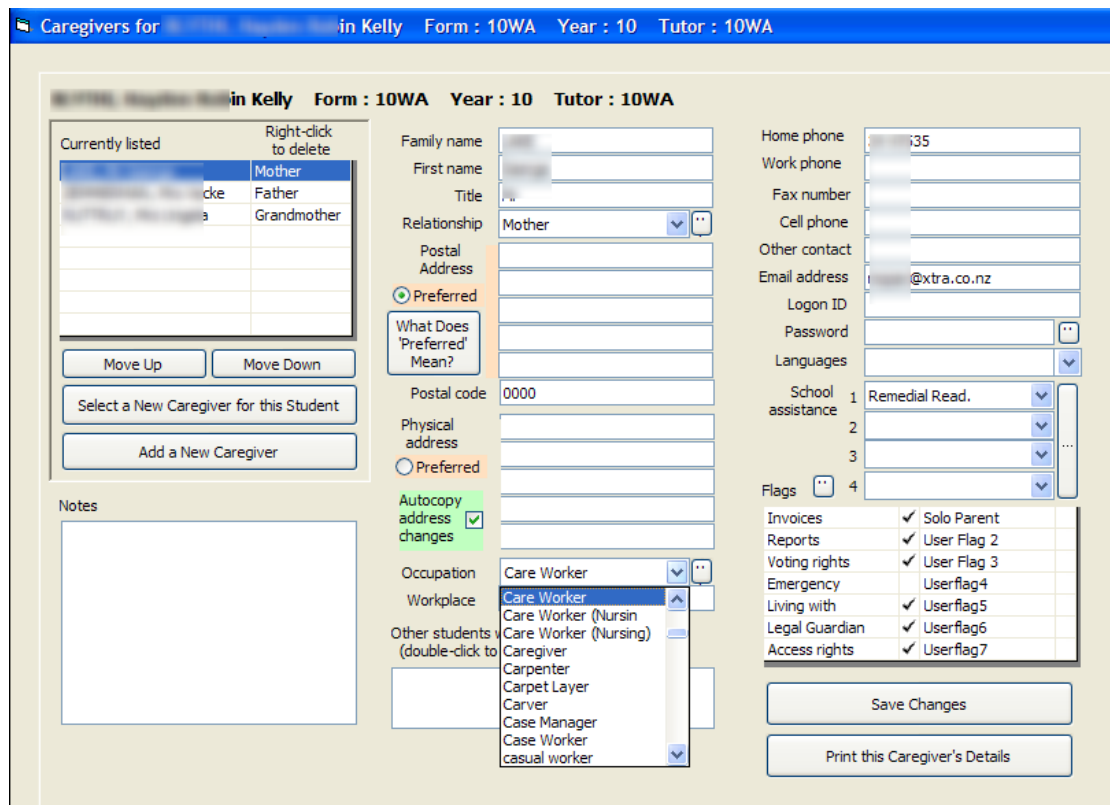


Figure 82: The caregiver data screen

Details relating to up to eight caregivers are listed for each student. As you arrive on the screen the details relating to the first listed caregiver are displayed.

To view the details for a different caregiver, select that caregiver from the list in the top left. There are many details and, as explained shortly, you can 'hide' those details which you do not wish to use.

Most of the details are self-explanatory. Several are connected to popup lists - eg. School assistance.

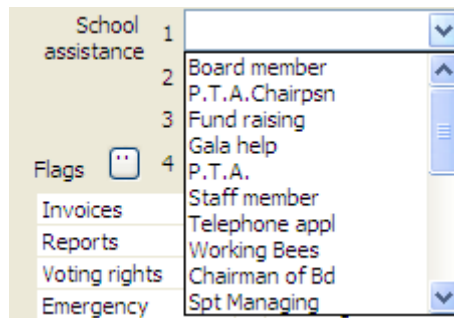


Figure 83: A caregiver's school assistance

You can adjust the various possibilities for a popup by clicking on the button with three dots to the right of the popup in question. The popup editing window will appear, via which you can both add new entries and can change the order of appearance of existing entries.

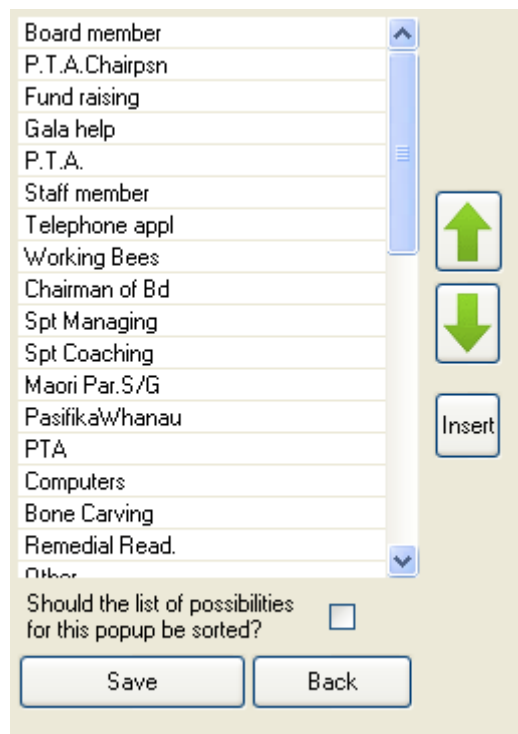


Figure 84: Editing the popup entries

You will notice that each caregiver can have two addresses – a Postal address and a Physical address. When designing automatically addressed documents to caregivers (eg. statements / invoices etc) you ask for their Address line 1, Address line 2 etc. Which of the possibilities (postal or physical) will be retrieved and displayed on the document depends on which you select as their 'preferred address' on this screen.

A full, five screen explanation of this can be viewed by clicking on the 'What does 'Preferred' mean?' button between the two addresses.

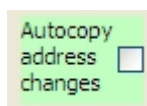
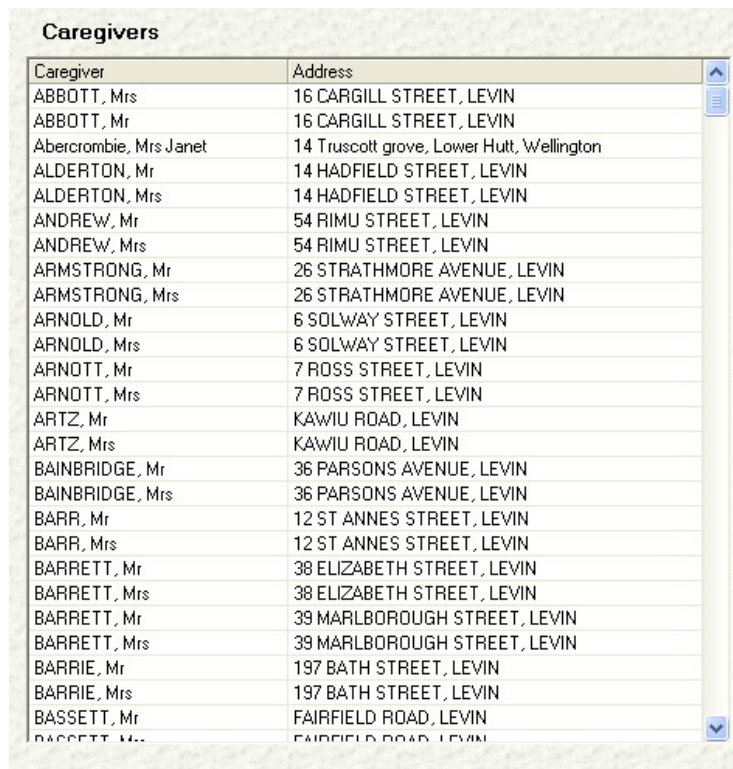


Figure 85: The small check box...

The small check box allows you to have changes to one address (physical or postal) automatically copied to the other address.

You can also alter the order in which caregivers are displayed by using the 'Move up' and 'Move down' buttons below the list of caregivers.

You can 'Select an existing caregiver' by clicking that button, and a list of existing caregivers will be displayed from which you can make your selection.



Caregiver	Address
ABBOTT, Mrs	16 CARGILL STREET, LEVIN
ABBOTT, Mr	16 CARGILL STREET, LEVIN
Abercrombie, Mrs Janet	14 Truscott grove, Lower Hutt, Wellington
ALDERTON, Mr	14 HADFIELD STREET, LEVIN
ALDERTON, Mrs	14 HADFIELD STREET, LEVIN
ANDREW, Mr	54 RIMU STREET, LEVIN
ANDREW, Mrs	54 RIMU STREET, LEVIN
ARMSTRONG, Mr	26 STRATHMORE AVENUE, LEVIN
ARMSTRONG, Mrs	26 STRATHMORE AVENUE, LEVIN
ARNOLD, Mr	6 SOLWAY STREET, LEVIN
ARNOLD, Mrs	6 SOLWAY STREET, LEVIN
ARNOTT, Mr	7 ROSS STREET, LEVIN
ARNOTT, Mrs	7 ROSS STREET, LEVIN
ARTZ, Mr	KAWIU ROAD, LEVIN
ARTZ, Mrs	KAWIU ROAD, LEVIN
BAINBRIDGE, Mr	36 PARSONS AVENUE, LEVIN
BAINBRIDGE, Mrs	36 PARSONS AVENUE, LEVIN
BARR, Mr	12 ST ANNES STREET, LEVIN
BARR, Mrs	12 ST ANNES STREET, LEVIN
BARRETT, Mr	38 ELIZABETH STREET, LEVIN
BARRETT, Mrs	38 ELIZABETH STREET, LEVIN
BARRETT, Mr	39 MARLBOROUGH STREET, LEVIN
BARRETT, Mrs	39 MARLBOROUGH STREET, LEVIN
BARRIE, Mr	197 BATH STREET, LEVIN
BARRIE, Mrs	197 BATH STREET, LEVIN
BASSETT, Mr	FAIRFIELD ROAD, LEVIN
BASSETT, Mrs	FAIRFIELD ROAD, LEVIN

Figure 86: Selecting an existing caregiver

Caregivers are maintained in a separate file and each is 'attached' to one or more students. This means that if you change the details on a particular caregiver, these changes will appear on the same caregiver when viewed for a different student. However, all was well until we attached a gentleman to a second student. It was one student's father, but was the uncle of the second student so 'Relationship' had to change from student to student. Consequently, each time a caregiver is added, a warning button appears.

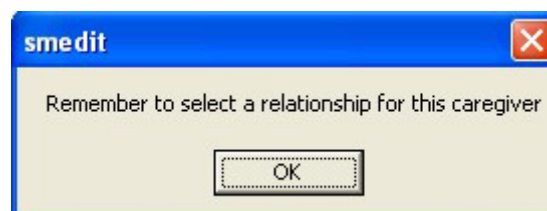


Figure 87: Remember a relationship

Make your selection from the popup list of possibilities.

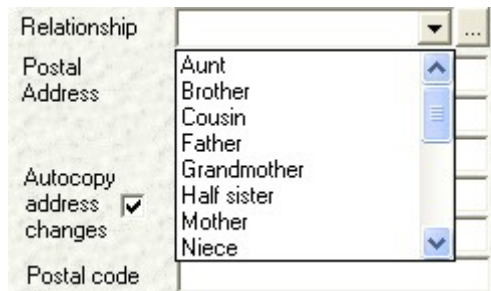


Figure 88: The caregiver relationships

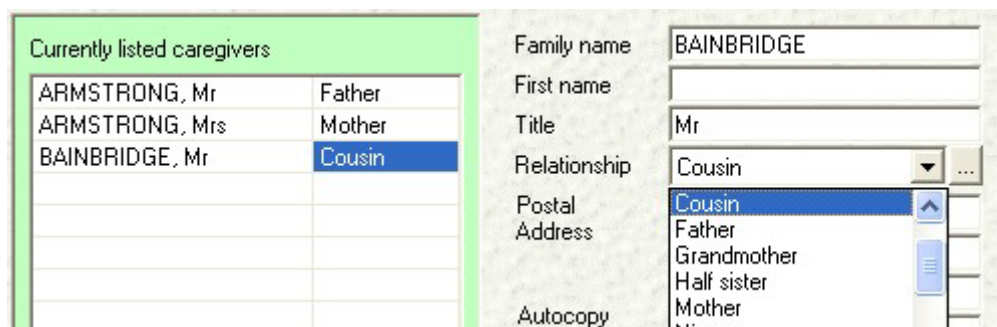


Figure 89: A selected relationship

Each caregiver can also have various 'Flags' set. The first seven have been named, leaving the second seven. A tick in 'Invoices' or 'Reports' means that these caregivers will be included when address labels are printed for invoices or reports.

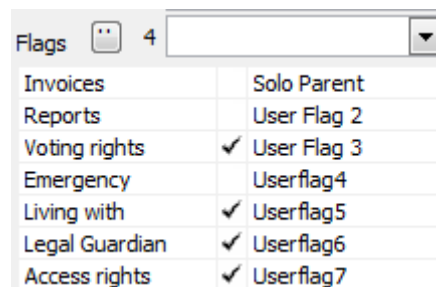


Figure 90: The caregiver 'flags'

At the bottom of the screen is 'Access Caregiver Utilities' for global utilities.

### Caregiver Utilities

The utilities are each accessed via one of the tabs on the screen, shown below.

### Hiding fields

As suggested earlier you can have selected caregivers fields hidden. Make your selection from the screen below.

**Global caregivers utilities**

Hiding fields | Default details | Unconnected caregivers | Global editing of caregivers

You may wish to hide one or more of the caregiver fields. Make that selection below. You may return at any time to reinstate the hidden field(s).

N.B. Those which are ticked will be visible

**Optional address details**

Postal address line 4

Postal address line 5

Zip code

Physical address line 1

Physical address line 2

Physical address line 3

Physical address line 4

Physical address line 5

Caregiver notes

Other students with this caregiver

**Optional contact details**

Fax number

Cell phone

Other contact

Email address

Logon ID

Password

**Optional assistance details**

School assistance 1

School assistance 2

School assistance 3

School assistance 4

Figure 91: Hiding unrequired fields

**Default details**

As each new caregiver is created you can have the following details set by default.

You can specify default settings for the first three caregivers for each student. These settings will automatically be applied when you enter the details for a new caregiver for a student.

**Global caregivers utilities**

Hiding fields | Default details | Unconnected caregivers | Global editing of caregivers

**Caregiver defaults**

The following default settings will apply to new caregivers when you click on the 'add a new caregiver' button

**Caregiver 1**

Title: Mrs

Relationship: Mother

Flags:

Invoices	<input checked="" type="checkbox"/>	Solo Parent
Reports	<input checked="" type="checkbox"/>	User Flag 2
Voting rights	<input checked="" type="checkbox"/>	User Flag 3
Emergency	<input type="checkbox"/>	Userflag4
Living with	<input checked="" type="checkbox"/>	Userflag5
Legal Guardian	<input checked="" type="checkbox"/>	Userflag6
Access rights	<input checked="" type="checkbox"/>	Userflag7

**Caregiver 2**

Title: Mr

Relationship: Father

Flags:

Invoices	<input checked="" type="checkbox"/>	Solo Parent
Reports	<input checked="" type="checkbox"/>	User Flag 2
Voting rights	<input checked="" type="checkbox"/>	User Flag 3
Emergency	<input type="checkbox"/>	Userflag4
Living with	<input checked="" type="checkbox"/>	Userflag5
Legal Guardian	<input checked="" type="checkbox"/>	Userflag6
Access rights	<input checked="" type="checkbox"/>	Userflag7

**All others**

Title:

Relationship: Emergency

Flags:

Invoices	<input type="checkbox"/>	Solo Parent
Reports	<input type="checkbox"/>	User Flag 2
Voting rights	<input type="checkbox"/>	User Flag 3
Emergency	<input checked="" type="checkbox"/>	Userflag4
Living with	<input type="checkbox"/>	Userflag5
Legal Guardian	<input type="checkbox"/>	Userflag6
Access rights	<input type="checkbox"/>	Userflag7

Save Defaults

Figure 92: The default settings for the first three caregivers

### Unconnected caregivers

If the last member of a family leaves then it is possible to have caregivers for whom there are no students 'left behind'. This process identifies such caregivers and allows you to remove them from the database. The screen for this process is shown below.

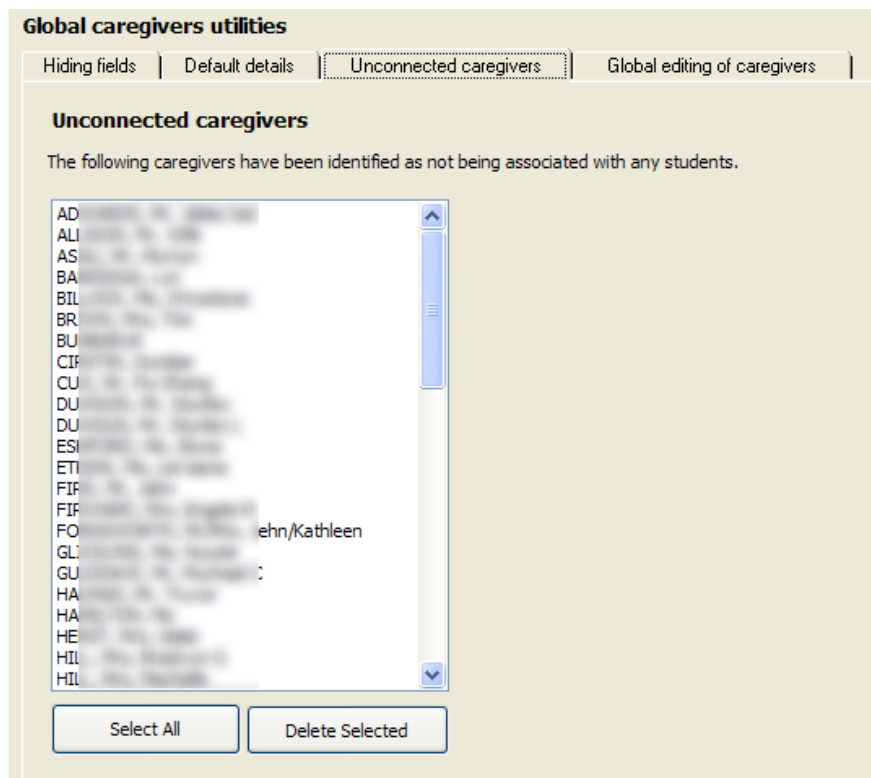


Figure 93: The removal of unconnected caregivers

### Global editing of caregivers

This process allows you to view and to edit information relating to all caregivers, on two screens. On the first, the caregivers and their details are displayed in the table, where they may be edited. If you make a change to one caregiver and the following caregiver had the same original data then you will be continuously asked if you wish to apply the same change to the following caregiver. This will carry on, down the column in question, until you reply 'No' to the suggested change.



Global caregivers utilities

Hiding fields | Default details | Unconnected caregivers | Global editing of caregivers

Editing caregivers				Editing caregivers' relationships and flags						
Family name	First name	Title	Postal address 1	Postal address 2	Postal address 3	Postal address 4	Postal address 5	Zip code	Ph	
SI	E	C	Mr	i	Ku Yokohama	awa JAPAN			1-	
F		K	Ms	treet	ANUI				2f	
T		V	Mr							
R	IN	N	Miss	street	ANUI				1f	
D		K	Mr		in Road	ANUI			R	
G		F	Mrs	en Road	ON				R	
M		K	Mr	ui Yick Ho	i Wan Estate	Wan HONG K			Rf	
N		I	Mrs							
K		J	Mr	it Road	ANUI				3f	
O	/S	K	Miss	Avenue	ANUI				4f	
K		S	Miss	Street	ANUI				5f	
N		C	Mr	ia Road	ANUI				2/	
T	R	T	Mrs	ot Stree	ANUI				1f	
H		V	Mr	ot Stree	ANUI				1f	
D	IRE	C	Mr	Road	gaehu Village	ANUI			3f	
L		K	Mrs	oad	OTARA				7f	
V	K	K	Mrs							
Y		N	Mr	ael Youn	x 2626	uilding			Cj	
W	IO	L	Miss	Harrison	ANUI				Flh	
F		C	Mr	ro Street	ANUI				4f	
P		F	Mr	Crescen	ANUI				2f	
P	JFU	T	Mrs	l Avenue	ANUI				4f	
Bi		J	Ms	wa Street	ANUI				1f	
R	DS	N	Mrs	Street	ANUI				1f	
K	BAKI	S	Mrs	nce	ANUI				3f	
M		C	Mrs							
N	S	Z	Mrs	Street	WAN ANUI				3f	

Figure 94: The global editing of caregiver data

The second global editing screen, accessed via the second tab shown in the Figure above, allows you to globally set flags for caregivers. Once again, the caregivers are listed on the table and all of their flags are displayed. To change a flag setting click in the cell and the tick will be turned on or off as appropriate. The screen for the global editing of caregiver flags is shown below.

Caregivers for ABACROMBIE, JAMES JEREMY

Global caregivers utilities

Hiding fields | Default details | Unconnected caregivers | Global editing of caregivers

Editing caregivers				Editing caregivers' relationships and flags									
Caregiver	Student	Relationship	Invoices	Reports	Voting right	Emergency	Living with	Legal guardian	Access right	User Flag	User Fl		
Mr ABBOTT	ABBOTT, COLIN GEOFFREY	Father	No	No	Yes	No	Yes	Yes	No	No			
Mrs ABBOTT	ABBOTT, COLIN GEOFFREY	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
none	ABBOTT, COLIN GEOFFREY	Uncle	No	No	No	No	No	No	No	No	No		
Mr ALDERTON	ALDERTON, KELVIN GEOFFREY	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs ALDERTON	ALDERTON, KELVIN GEOFFREY	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr ANDREW	ANDREW, MICHAEL GRAEME	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs ANDREW	ANDREW, MICHAEL GRAEME	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr ARMSTRONG	Armstrong, Jennifer Joan	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs ARMSTRONG	Armstrong, Jennifer Joan	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr ARNOLD	ARNOLD, TRACEY ANNE	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs ARNOLD	ARNOLD, TRACEY ANNE	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr ARNOTT	ARNOTT, LEIGH HELEN	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs ARNOTT	ARNOTT, LEIGH HELEN	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr ARTZ	ARTZ, CHERIE MAI	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs ARTZ	ARTZ, CHERIE MAI	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr BAINBRIDGE	BAINBRIDGE, GLENN RAYNAL	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs BAINBRIDGE	BAINBRIDGE, GLENN RAYNAL	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr BARR	BARR, CHRISTOPHER	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs BARR	BARR, CHRISTOPHER	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr BARRETT	BARRETT, MONIQUE CATHRINE	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs BARRETT	BARRETT, MONIQUE CATHRINE	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr BARRETT	BARRETT, NICHOLAS OLIVER	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs BARRETT	BARRETT, NICHOLAS OLIVER	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr BARRIE	BARRIE, NOEL LINDSAY	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs BARRIE	BARRIE, NOEL LINDSAY	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr BASSETT	BASSETT, LEIGHANNE	Father	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mrs BASSETT	BASSETT, LEIGHANNE	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		
Mr BASSETT	BASSETT, DIANNA JANE	Father	No	No	No	No	No	No	No	No	No		
Mrs BASSETT	BASSETT, LEIGHANNE	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No		

Figure 95: The global editing of caregiver flags

**Process to move students to a single Caregiver, and Delete Duplicate Caregiver**

This utility allows you to identify duplicate **caregivers** and move only the student(s) from the right to the left hand caregiver. The duplicate caregiver can then be deleted. This will benefit: financial, BOT elections, LMS etc.

NOTE: only the student moves. No caregiver details such as address or phone number will move.

### Search

Access this tab through any student's > caregiver Details > Access Caregiver Utilities > Identify Duplicate Caregivers.

Click "Search for Duplicates" button to display the duplicate caregiver list. Each Caregiver is displayed with a unique ID in the list.

### Fields

Caregiver and student details cannot be edited from this page.

### Field Colours

Green: a perfect match between duplicate caregivers

Yellow: no match between duplicate caregivers

Grey: no data to display

### Confirm as Valid

When two caregivers are displayed and are valid duplicates e.g. Mr Jo Jones and Mrs Jo Jones, you can choose to click "Validate Caregiver". They do not appear on the duplicate list next time.

### Transfer Students

If you have a perfect match between the two caregivers, but one has a student (appears on the right hand side and not the left hand side) you can click "<<Transfer Students" which will move the student only from the right to the left.

Once the student has been transferred you can click "Delete Right Hand Caregiver". This will remove the duplicate caregiver. Now the deleted caregiver displays on the list with a line through their name indicating they have been deleted.

Note: If you require information to be added to the other caregiver such as phone numbers etc, note these down and these can be entered through the "Global editing of caregiver" tab.

### Switching Caregiver Position

The earliest added caregiver is displayed automatically on the left hand side. If you choose to keep the caregiver on the right hand side and not the left hand side, select the other caregiver from the "duplicate list". This will then highlight their name in the list and position them on the left hand side.

### Three or More Caregivers

When there are more than two duplicate caregivers, the right hand side "CaregiverID" has a dropdown for you to select another duplicate caregiver. This only rotates on the right hand side.

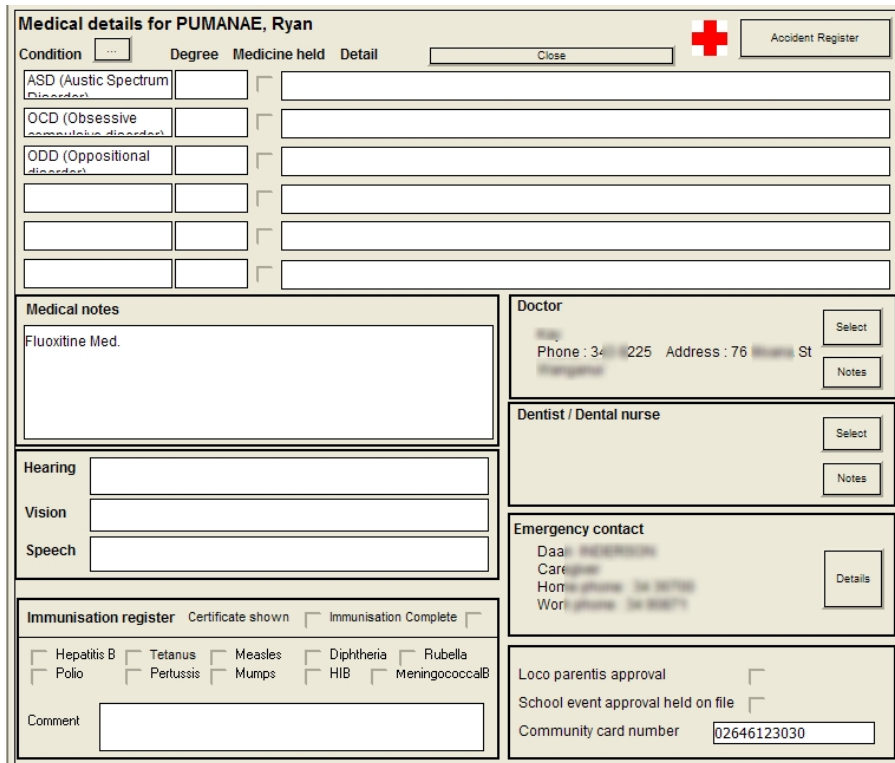
### Back - Exit Duplicate Caregivers

To exit the duplicate caregivers page you can click the "back" button to return to the caregiver utility screen.

When you re-enter this page and click "Search for Duplicates", the list is refreshed.

## 10.4 Medical details

Prior to designing this screen we consulted with the Ministry of Health to ensure that we were offering all of the data that they might wish schools to have access to. You can now store details relating to up to six medical problems, including whether or not medicine is held by the school and a separate notes field for each problem.



**Medical details for PUMANAE, Ryan**

Condition	Degree	Medicine held	Detail
ASD (Autistic Spectrum Disorder)		<input type="checkbox"/>	
OCD (Obsessive compulsive disorder)		<input type="checkbox"/>	
ODD (Oppositional disorder)		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

**Medical notes**  
Fluoxetine Med.

**Hearing**   
**Vision**   
**Speech**

**Immunisation register** Certificate shown  Immunisation Complete

Hepatitis B    Tetanus    Measles    Diphtheria    Rubella  
 Polio    Pertussis    Mumps    HIB    MeningococcalB

Comment

**Doctor**   
Phone : 34 225 Address : 76 Balmoral St

**Dentist / Dental nurse**

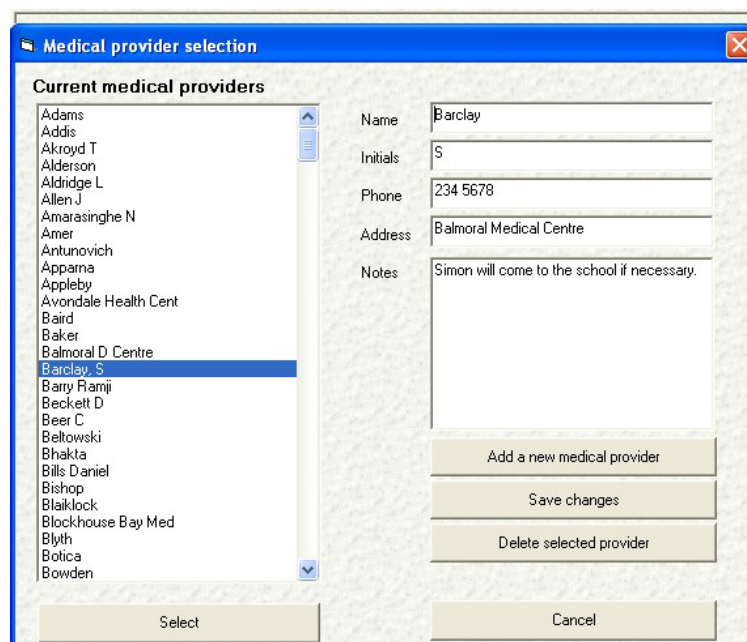
**Emergency contact**   
Daa:   
Care:   
Home phone:   
Work phone:

Loco parentis approval   
School event approval held on file   
Community card number

Figure 96: The medical details screen

You also have open-ended medical notes and the three original categories : Hearing, Vision and Speech.

If you click on either the 'Doctor : Select' or the 'Dentist : Select' buttons you will arrive at the following screen.



**Medical provider selection**

**Current medical providers**

- Adams
- Addis
- Akroyd T
- Alderson
- Aldridge L
- Allen J
- Amarasinghe N
- Amer
- Antunovich
- Apparna
- Appleby
- Avondale Health Cent
- Baird
- Baker
- Balmoral D Centre
- Barclay, S
- Barry Ramji
- Beckett D
- Beer C
- Belowski
- Bhakta
- Bills Daniel
- Bishop
- Blaklock
- Blockhouse Bay Med
- Blyth
- Botica
- Bowden

Name:   
Initials:   
Phone:   
Address:   
Notes:

Figure 97: The file of doctors and dentists

Use this screen to record the various medical and dental practitioners used by the students from your school. To attach a particular entry to a student select the entry from the list on the left and click the 'Select' button below.

You can enter notes relating to each practitioner and, if you click on the 'Doctor : Notes' or the 'Dentist : Notes' buttons on the main screen you will access their notes directly, as shown below.

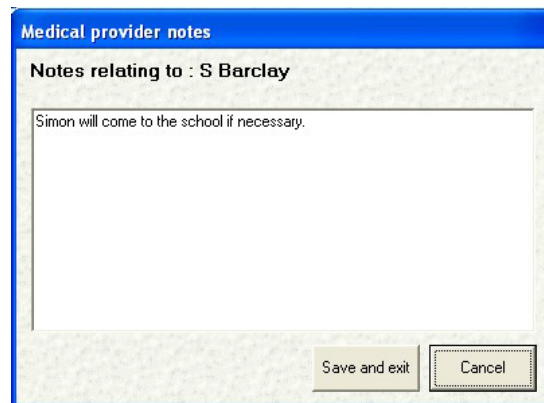


Figure 98: The doctor/dentist notes screen

At the top of the main screen (in 800 x 600 mode) there is a button to access the second screen of medical details.

Immunisation register			
Certificate shown	<input checked="" type="checkbox"/>	Immunisation Complete	<input checked="" type="checkbox"/>
Hepatitis B	<input checked="" type="checkbox"/>	Tetanus	<input checked="" type="checkbox"/>
Polio	<input checked="" type="checkbox"/>	Measles	<input checked="" type="checkbox"/>
Diphtheria	<input checked="" type="checkbox"/>	Pertussis	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	Rubella	<input checked="" type="checkbox"/>
		Mumps	<input checked="" type="checkbox"/>
		HIB	<input checked="" type="checkbox"/>
Comment			
<input type="text"/>			

Emergency contact	
Mr BAINBRIDGE	<input type="button" value="Details"/>
Cousin	
Home phone : 354 6543	
Work phone : 354 5566	

Loco parentis approval	<input checked="" type="checkbox"/>
School event approval held on file	<input checked="" type="checkbox"/>
Community card number	<input type="text" value="123-456-789"/>

Figure 99: The second medical screen

This screen includes the immunisation record, the student's emergency contact details, and three other fields relating to this student.

There is also a button which takes you to an 'Accident register' screen. This button takes you to the 'Osh' module. The full version of the OSH module is available via Staff Manager. See the end of this section for more information concerning the full range of features available.

The features available via Student Manager for the current student, are:

- The ability to see a list of all incidents involving this student
- The ability to create an incident report and an accident investigation report for new incidents involving the current student.
- The ability to print copies of these reports.

The Student Manager version of the OSH screen is shown below.

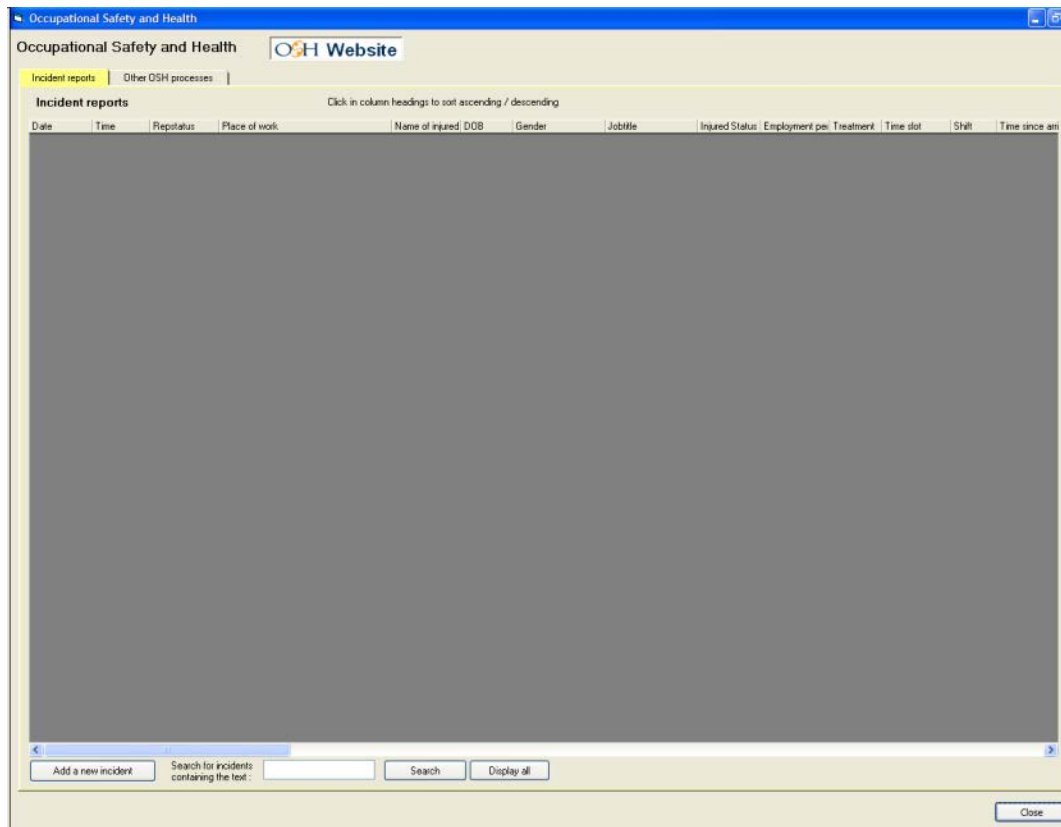


Figure 100: The 'Incident list' notes

This screen, empty above, displays all of the incidents relating to the current student. At the bottom of the screen is a button labelled, 'Add a new incident'. Clicking this button takes you to the Incident Report, as follows.

Occupational Safety and Health OSH Website

Incident reports | Other OSH processes

**Form of register or notification of circumstances of accident or serious harm**

Required for section 25(1), (1A), (1B), and (3)(b) of the Health and Safety in Employment Act 1992  
For non-injury accident, complete questions 1, 2, 3, 9, 10, 11, 14 and 15 as applicable

**1 Particulars of Employer, self-employed person or principal:**  
*(Business name, postal address and telephone number)* This information is obtained from cm/sm configuration

Business name :  
Postal address : PO Box [redacted]  
Wairarapa  
New Zealand  
Telephone Number : 5003

**2 The person reporting is :** [dropdown]

**3 Location of place of work**  
[text box] *(shop, shed, unit nos., floor, building, street nos. and names, locality/suburbs, or details of vehicle, ship or aircraft)*

**4 Personal data of injured person**

Name: Jess [redacted] MITION  
Residential address: 5 Emerald Street  
Wairarapa  
Date of Birth: 24/06/1993 Gender: Female [dropdown]

**5 Occupation or job title of injured person**  
*(employees or self-employed persons only)*  
Student

**6 The injured person is** [dropdown]

**7 Period of employment of injured person**  
*(employees only)* [dropdown]

**8 Treatment of injury** [dropdown]

**9 Time and date of accident / serious harm**

Time: [text box] Date: [text box]  
Hours worked since arrival at work: [text box]

Save changes Delete this incident Print reports Investigation report Incident list

Close

Figure 101: The 'Accident' notes

Enter the relevant information into the boxes on the green screen. As you enter boxes lower on the screen, it will automatically scroll up to reveal the next set of information entry areas. You can, alternatively, move up and down the form using the scroll bar at the right side of the screen.

**NOTE:** to enter the next line in a text box, you **must** use Ctrl-Enter - as described on the report above.

The full incident report form is shown below.

The screenshot shows a web-based incident report form with the following sections:

- 7 Period of employment of injured person** (employees only): A dropdown menu.
- 8 Treatment of injury**: A dropdown menu.
- 9 Time and date of accident / serious harm**: Fields for Time, Date, Hours worked since arrival at work (employees and self-employed persons only), and Shift.
- 10 Mechanism of accident / serious harm**: A dropdown menu.
- 11 Agency of accident / serious harm**: A dropdown menu.
- 12 Body part**: A dropdown menu.
- 13 Nature of injury / disease** (specify all): A grid of checkboxes for various injury types, including fractures, dislocations, sprains, head injuries, internal injuries, amputations, open wounds, superficial injuries, bruising, foreign bodies, burns, nerve injuries, puncture wounds, poisonings, multiple injuries, damage to artificial aids, nervous system diseases, musculoskeletal system diseases, skin diseases, digestive system diseases, infectious/parasitic diseases, respiratory system diseases, circulatory system diseases, tumours, and mental disorders. There is also a checkbox for 'Fatal'.
- 14 Where and how did the accident / serious harm happen?**: A large text area for description.
- 15 If notification is from an employer:** Two questions with radio button options for Yes/No:
  - Has an investigation been carried out?
  - Was a significant hazard involved?

A red box highlights the question: "What is 'Serious harm'? OSH provide a document which answers this question. If you have Acrobat Reader installed then you can view it here." Below this box is a "View document" button.

At the bottom of the form are five buttons: "Save changes", "Delete this incident", "Print reports", "Investigation report", and "Incident list".

Figure 102: The incident entry screen scrolled down

Alongside the nature of the harm questions is a red area 'What is serious harm?'. OSH provides a small booklet on this topic and a copy of this may be viewed, providing that you have Acrobat Reader installed, by clicking on the 'View document' button.

It is important to emphasise the need to investigate **all** incidents to determine if there is a significant hazard to be managed, irrespective of the outcome. Some no harm incidents identify significant hazards. It assists the school in self managing its own health and safety. (Rob Scriven, Service manager, Wellington/Kapiti region, OSH)

Buttons at the bottom of the incident report screen are:

1 Save changes

Once you have finished your changes, click this button to have them saved back to both the database and the display grid. This will also return you to the list of incidents.

2 Delete this incident

You can delete an incident which you either entered in error or no longer require.

3 Print reports

This allows you to print the displayed entry. Both the incident report and its associated accident investigation report will be printed.

5 Incident list

This button returns you to the list of incidents.

4 Incident report

The student's details are inserted into the OSH Accident investigation report (shown in part below), again this will automatically scroll as you edit fields. This is completed in the same way as the green incident report form – again, note press Ctrl-Enter to enter the next line in a text box as described on the report in green.

Occupational Safety and Health OSH Website

Incident reports | Other OSH processes

Making a difference! Accident investigation OSH DEPARTMENT OF LABOUR TE TARI MARI

Name of organisation: Branch/Department: Muriel Gym Club

NB To move to another line in the multiline entries (e.g. Address), press Ctrl-Enter

**PARTICULARS OF ACCIDENT**

Date of accident: 10/02/2009 Time: 11:35 am Date reported: 10/02/2009

Location: In the boys' changing rooms

**THE INJURED PERSON**

Name: Harry Potter Address: 5 Hogwats Street WHANGAREI

Age: 15 Phone number: 32 34567

Length of employment - at plant: - on job:

Type of injury: Laceration/cut or Other (specify)

Injured part of body: facial injuries Remarks:

**DAMAGED PROPERTY**

Property / Material damaged: There was quite an amount of damage caused to the surrounding walls with all manner of strange events occurring.

Nature of damage:

Object substance inflicting damage: Unknown

**THE ACCIDENT**

\*Description Describe what happened. Keep associated diagram (essential for vehicular accident) on file.

\*Analysis What were the causes of the accident?

Save changes Delete this incident Print reports Incident report Incident list

Figure 103: Viewing / entering an investigation report

The 'Print reports' button at the bottom of the incident report screen shows the printing screen, with your two reports displayed ready for final checking and, if you wish, printing. Printing is done via the small 'printer' button at the top of the print area. The other buttons allow you to enlarge or reduce the display. A section of this screen is shown below.



**Form of register or notification of circumstances of accident or serious harm**  
Required for section 25(1), (1A), (1B), and (3)(b) of the Health and Safety in Employment Act 1992  
For non-injury accident, complete questions 1, 2, 3, 9, 10, 11, 14 and 15 as applicable

1. Particulars of employer, self employed person or principal:  
(business name, postal address and telephone number)  
Business name: MUELC  
Postal address: Taupo  
Telephone number: [ ]

2. The person reporting is: An employee

3. Location of place of work:  
In the boondocks  
(shop, shed, unit nos., floor, building, street nos. and names, locality/suburb, or details of vehicle, ship or aircraft.)

4. Personal data of injured person

9. Time and date of accident / serious harm  
Time: 8.05 am  
Date: 10/01/2005  
Shift: Afternoon  
Hours worked since arrival at work (employees or self-employed persons only): 17

10. Mechanism of accident / serious harm: sound or pressure

11. Agency of accident / serious harm: mobile plant or transport

12. Body part: multiple locations

13. Nature of injury / disease (specify all) Fatal: Yes

Figure 104: A printed incident report

The equivalent screen for the printing of an investigation report is shown below.

**Accident Investigation**

Name of organisation: MUELC  
Branch/Department: Chess club

PARTICULARS OF ACCIDENT			
Date of accident	Time	Location	Date reported
10/01/2005	8.05 am	In the boys' locker room	10/01/2005

THE INJURED PERSON	
Name: Freddy Mercury	Address: 14 John Street 37 Woodfield Grove Levin or Wanganui
Age: 16	Phone number: 123 4567
Date of accident: 10/01/2005	Length of employment - on job: 2
Length of employment - at plant: 4	Injured part: Big toe right foot
Type of injury:	Remarks: Painfull

DAMAGED PROPERTY	
Property / material damaged: Actually there was quite a lot. When Jimmy kicked Freddy he slipped and created a whirlpool in the adjacent sink which caused all manner of strange events to occur.	Nature of damage: Quite a bit of waterlogging was experienced in the vicinity of the sink.
	Object/substance inflicting damage: Strangely, nothing but Jimmy's foot and some water.

Figure 105: A printed investigation report

At the bottom of the accident investigation report you must have the form signed by the relevant person.

Having entered a couple of incidents for James Jeremy Abacrombie, the 'incidents list' now appears as follows. You can return to editing a particular incident by double-clicking on the relevant row of the list.

Occupational Safety and Health **OSH Website**

Incident reports | Other OSH processes

**Incident reports** Click in column headings to sort ascending / descending

Date	Time	Repstatus	Place of work	Name of injured	DOB	Gender	Jobtitle
10:30:00 a.m.	08/02/2005	A principal	Outside the T-block	JAMES JEREM	28/02/1991	M	Student
8:45:00 a.m.	11/02/2005	A principal	In the darkroom	JAMES JEREM	28/02/1991	M	Student

Figure 106: The bottom of the incident report

Should you click on the 'Print reports' button at the bottom of the screen while editing then the screen will change to the print-viewing display, as shown below. Both of the two current reports will be available for viewing / printing.

Occupational Safety and Health **OSH Website**

Incident reports | Other OSH processes

1/2

**Accident Investigation**

Name of organisation : Hutt International Boys' School  
Branch/Department :

**PARTICULARS OF ACCIDENT**

Date of accident	Time	Location	Date reported
08/02/2005	10:30:00 a		21/02/2005

**THE INJURED PERSON**

Name : JAMES JEREMY ABACROMBIE		Address : 10 CARGILL STREET LEVIN	
Age : 10	Phone number :		
Date of accident : 08/02/2005			
Length of employment - at plant :		Length of employment - on job :	
Type of injury :		Injured part :	
Remarks :			

**DAMAGED PROPERTY**

Property / material damaged :	Nature of damage :

Print both

Figure 107: The bottom of the incident report

On the left of this screen is a button labelled 'Print both'. Should you click this button then you will be returned to the main incident list screen from which you may select multiple reports.

At the bottom of this screen will be the now familiar buttons – apart from the first....

Proceed to printing

Search for incidents containing the text :

Search

Display all

Figure 108: Buttons on lower screen

.... which causes the selected incidents or investigations to be printed. These will be displayed back on the printing screen, where they may be examined (using the magnifying glass!) prior to printing.

As shown below, there are now more than one pages available and you may move backwards and forwards through the printed pages using the arrow buttons pointed at below.

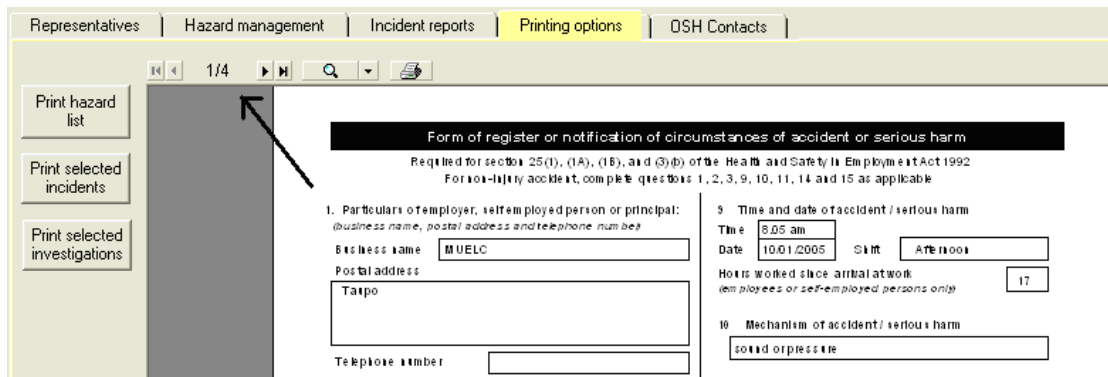


Figure 109: The multiple display of printed reports

Finally, the OSH screen has a second tab which provides more information about the facilities available through the full module in Staff Manager. This screen is shown below.

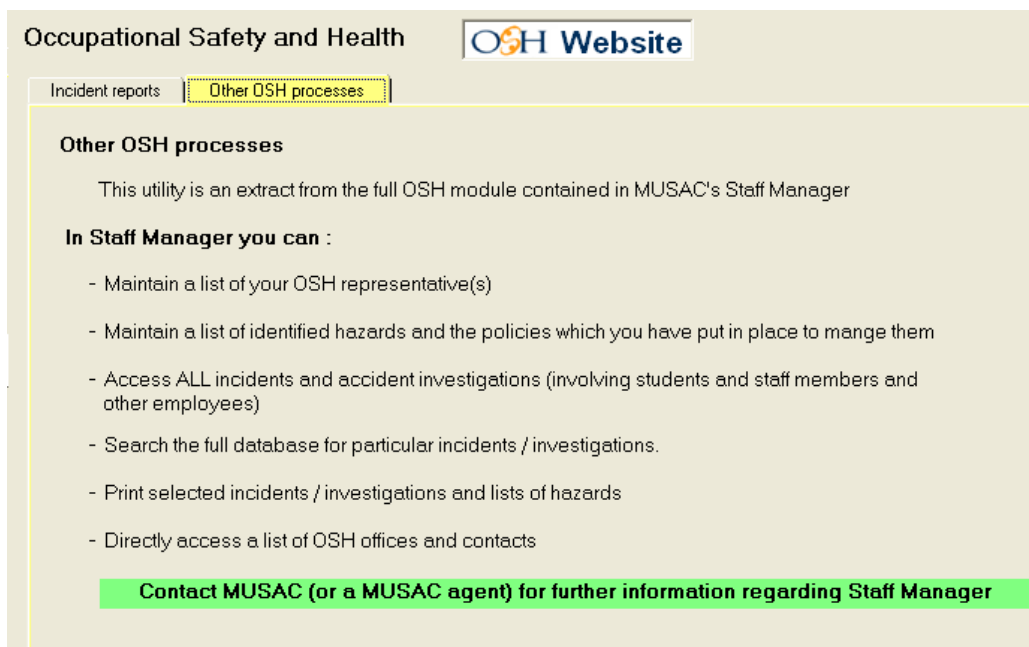


Figure 110: The other OSH facilities

## 10.5 Ministry of Education details

**Note** The Ministry of Education makes annual changes to this part of Student Manager, so please refer to the Document Library section of our website for the latest changes and guide for completing your Returns.

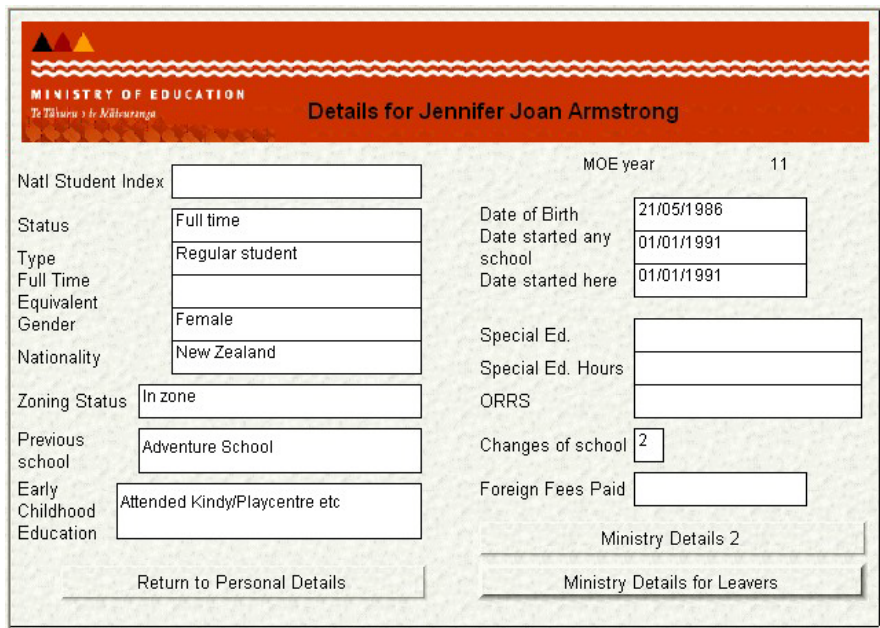


Figure 111: The first MOE screen

The first has the usual range of Ministry information required for each student, and the second contains ethnicity details as required by the Ministry.




Figure 112: The second MOE screen

**Note:** Some of these fields are repeated on other documents. That's been done for the sake of simplicity. Wherever you enter details (eg. Iwi) the data is stored back to its one spot in the database and will appear thenceforth whenever you view that information.

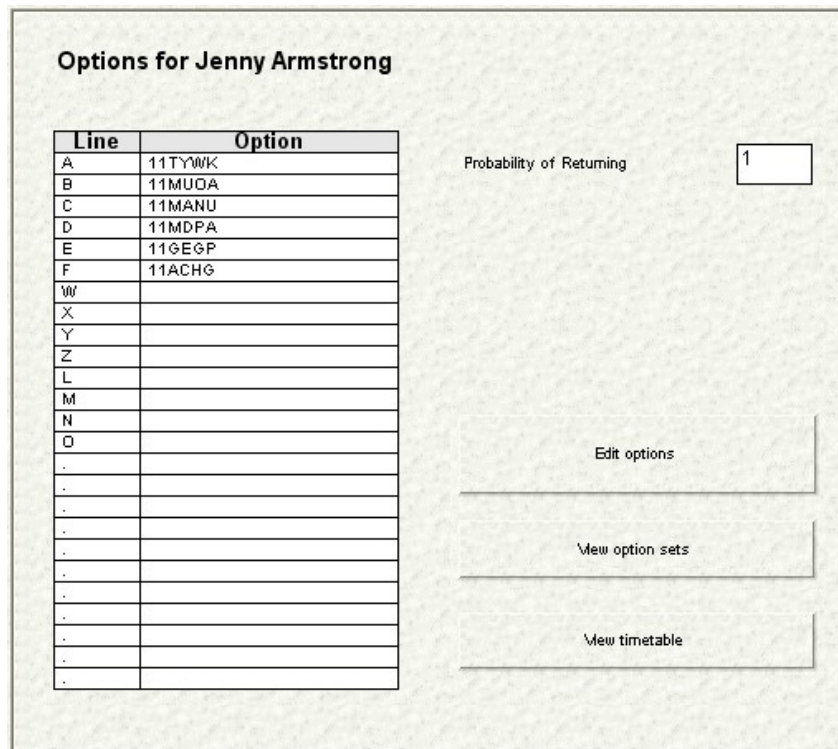
## 10.6 Options and Timetable

Students' courses are determined by both the compulsory subjects which they take and the option classes which they select.

Compulsory subjects, generally referred to as 'Core' (because some compulsory subjects (eg.English) are frequently taken as options), are those taken by all students in a particular horizontal class eg. a form class.

Options are those subject/teacher combinations selected from lines of such classes within a set of lines - An option set. Some schools rotate options and students may move between more than one set during a particular year. At any one time during the year one particular set of options will be 'Active'.

Students option choices are displayed on their 'Options' document, an example of which is shown below.



Line	Option
A	11TYWK
B	11MUDA
C	11MANU
D	11MDPA
E	11GEGP
F	11ACHG
W	
X	
Y	
Z	
L	
M	
N	
O	
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Probability of Returning

Edit options

View option sets

View timetable

Figure 113: The student's options document

To access the editing screen click 'Edit options' for the following screen.

Student : **Armstrong, Jennifer Joan** Year : **11**

Selected option set: [This year's options (attached to column set 1)] Year: [2003]

Student's current options

Line	Option	Pin	Markbook
1	11TY_WK		11TY 2003
2	11MU_DA		11MU 2003
3	11MA_NU		11MA 2003
4	11MD_PA		11MD 2003
5	11GE_GP		11GE 2003
6	11AC_HG		11AC 2003
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			

Select options from:

Key	Option	No.	Markbook
A			
B			
C			
D			
E			
F			
G			
H			
I			
J			
K			
L			
M			
N			
O			
P			
Q			
R			
S			
T			
U			
V			
W			

Student's core subjects

Subject	Markbook
11PE_	11PE 2003

Buttons: Pin all, Save changes, Recount, **To view class members right-click on the number column above**, View all of student's option sets, Print change notification

Figure 114: The options data entry screen

There are three lists on this screen. The left displays the student's current options. The centre list displays the various option classes in the currently selected option line, and the right displays the current student's 'Core' classes.

To change or select options click in the first list, in the row corresponding to the option line for which you wish to make a selection. The various option classes available in that line will be displayed in the centre list. Click on the required option from this list and it will be attached to the student in the selected line (row).

Key	Option	No.	Markbook
A	11MA HP	9	11MA 2003
B	11EG PK	6	11EG 2003
C	11w/w PA	3	11w/w 2003
D	11EG RT	6	11EG 2003
E	11GE PT	9	11GE 2003
F	11HI MO	5	11HI 2003
G	11Mw DV	12	11Mw 2003
H	11SC DN	24	11SC 2003
I	11MA RA	21	11MA 2003
J	11TY WK	8	11TY 2003
K	11MA BT	10	11MA 2003
L			
M			

Figure 115: The available options

The centre list also displays the number of students who are currently attached to each option and the name of the electronic markbook (if any) associated with the subject. By default, when you click on a row, the options available AT THE LEVEL OF THE STUDENT will be displayed. (In the example above the student is in Year 11, so the year 11 options are displayed.)

To move to a different year's options (eg. if our student is taking a year 12 option in a particular line) then you can display the required set of options using the navigation buttons at the top of the centre column.

A faster way to allocate options to students is to type the number corresponding to the required option line, followed by the letter corresponding to the required option. Thus you can enter a range of options for a student by typing eg. 1 B 2 G 3 C 4 A etc

The left list also displays whether or not each option is pinned thus causing the entries to be NOT altered when automatic option allocation is performed using MUSAC's Timetable Assistant software.

This table also displays the markbooks of which our student is a member.

Line	Option	Pin	Markbook
1	11TY_WK	✓	11TY 2003
2	11MU_OA	✓	11MU 2003
3	11MA_NU	✓	11MA 2003
4	11MD_PA	✓	11MD 2003
5	11GE_GP	✓	11GE 2003
6	11AC_HG	✓	11AC 2003
7			

Figure 116: Pinned options and their markbooks

At the bottom right of the screen is a button which will cause a printout of a student's changed options to be generated.

Returning to the centre list : If you click on the number of students taking a particular option then their names will be displayed, as shown below.



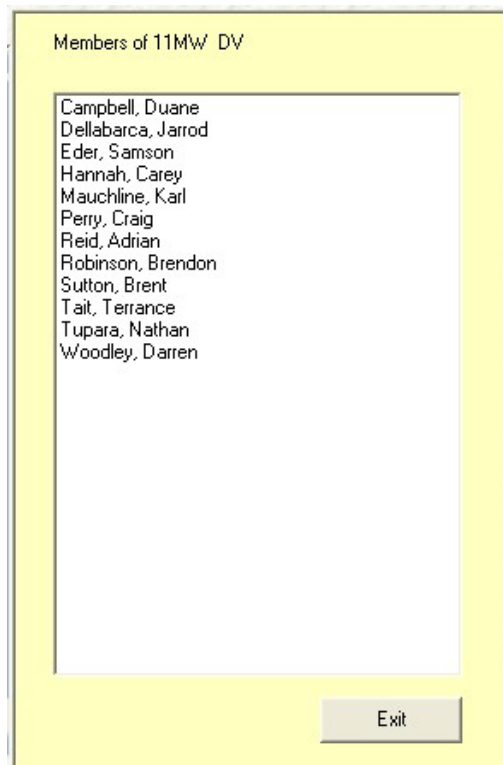


Figure 117: The members of an option class

From the main options screen click 'Display option sets'.

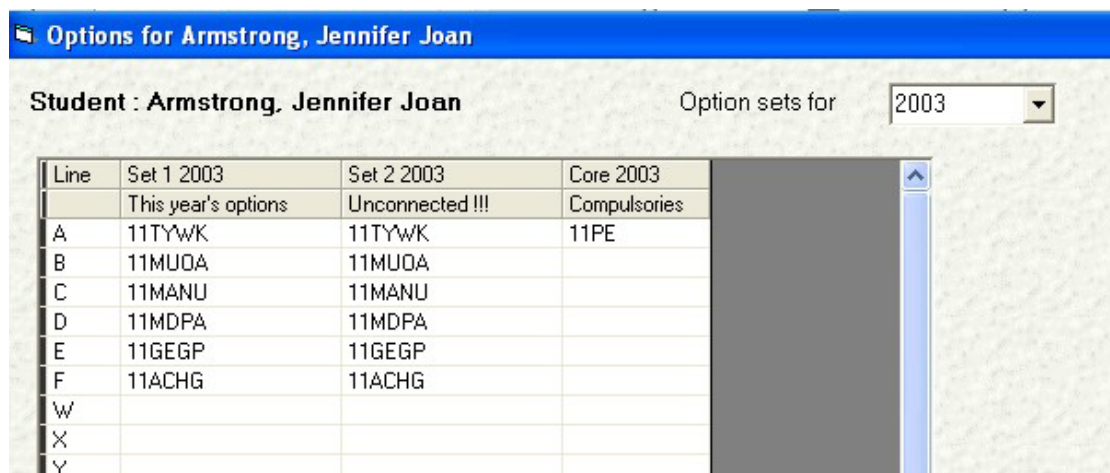


Figure 118: The historical record

All of the current student's option sets for the current year are displayed. Select 'All years' and view lists of all of the options ever taken by this student.

Finally, the third button allows you to view the current student's current timetable.

If you have not previously visited this screen, you will need to click on the small button at the top to 'Select' for the following window to display.



**Timetable selection details**

**Default settings for timetable display and printing**

Year: 2003

Option set: This year's options  
The selected option set is linked to option column set number 6

Timetable path: d:\TT5\

Timetable: TEACHERS.5A4

Format: 3 lines per cell

Teacher name (3 lines per cell only):  Code  Full name from timetable per cell only

The numbers of days and periods are determined from the definition of the selected timetable

Exit

Figure 119: Connecting to a timetable

Select the year, option set, the timetable path (to our Timetable software), the timetable version currently in operation, and the display format which you wish to view. You have a choice of three display formats - one, two or three lines per cell, and you can also have either the teacher's name or code displayed.

Once you have successfully made your selections, the student's timetable will be displayed, a partial example of which is shown below.

**Student : Leighanne Bassett** Year

Year : 2003 Option set : 1 - This year's options

	MON	TUE	WED
Period 1	PE PETERS M GYM	SS THRUPP M 8	EG PITTUCK M T4
Period 2	SC RILEY K 2	EG PITTUCK M T4	MM CLARKE M T5
Period 3	MM CLARKE M T5	MM CLARKE M T5	SS THRUPP M 8
Period 4	SS THRUPP M 8	AM KAIN L Art	SC RILEY K 2

Figure 120: A student's timetable

Using the Print button at the top of the screen you can print individual or multiple students' timetables. These are also available via the 'List printing' routine.

## 10.7 Financial transactions

The financial document appears as shown below. The first few of the student's financial transactions are shown, along with his or her current total debt. To access the finer details of the transaction history, and to create or manage transactions, click on the 'Adjust transactions' button at the top of the screen.

**Armstrong, Jennifer Joan**  
Year : 11 Form 11RA Group VF1  
Total outstanding debt : \$0.00

Adjust transactions    Student's details

Date	Inv/Rcpt	Detail	Db Amnt	Cr Amnt	Balance	G.S.T.	St.
15/04/200:	Counter	Locker Key	5.00			.56	Y
15/04/200:	Counter	Uniform	116.70			12.97	Y
15/04/200:	Counter	Rugby Junior	15.00			1.67	Y
15/04/200:	Counter	Hockey	60.00			6.67	Y
15/04/200:	Counter	Shakespeare Festival	19.00			2.11	Y
15/04/200:	Not issued	Payment received		215.70		23.98	A
< Back			Next >				

Figure 121: A student's financial details document

This will move you through to the student's financial area described in full (refer 'Financial'). An example of the screen involved is shown below.

**Student Manager financial transactions**

Edit Links View Options Automatic payments Practice area

**Student : ARMSTRONG, JENNIFER JOAN**      Year : 11    Form :    Group :

Date	Invoice/Receipt	Detail	(Click in headings to so	Db Amount	Cr Amount	Balance	G.S.T.	St.	Ledger	Method
15/04/2003	Counter	Locker Key		5.00			0.56	Y		
15/04/2003	Counter	Uniform		116.70			12.97	Y		
15/04/2003	Counter	Rugby Junior		15.00			1.67	Y		
15/04/2003	Counter	Hockey		60.00			6.67	Y		
15/04/2003	Counter	Shakespeare Festival		19.00			2.11	Y		
15/04/2003	Not issued	Payment received			215.70		23.98	A		1 Cheque

Figure 122: The financial transactions data entry screen

The second button at the top of the screen, 'Student's details', displays a summary of the current debt position of the student, as shown below.

Figure 123: The student's current debt

## 10.8 Pastoral transactions

This document displays the current student's pastoral transactions, as shown below.

Figure 124: The 'Pastoral' document

Pastoral transactions cannot be edited via this screen. This can only be done via the Pastoral utility, accessed from the main menu screen. At the bottom of the screen, not visible above, is a button allowing you to filter the displayed transactions. The filter screen follows.

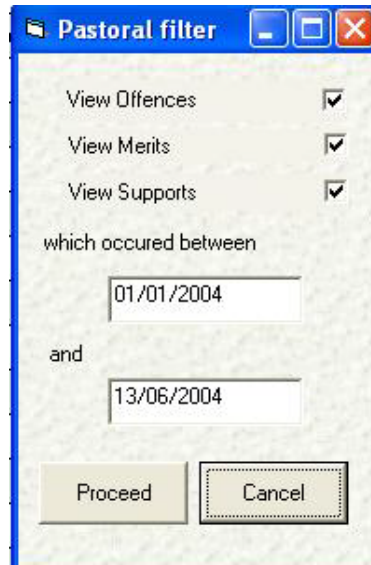


Figure 125: Filtering pastoral transactions

### 10.9 Attendance details

The attendance summary screen is as shown below.

Term 1		Term 2		Term 3		Term 4	
05/01	XXXXX	05/04	XXXXc	05/07		04/10	
12/01	XXXXX	12/04	ccXXX	12/07		11/10	
19/01	XXXXX	19/04	XXXXX	19/07		18/10	
26/01	XXXXX	26/04	XXXXX	26/07		25/10	
02/02	XXXXX	03/05	XXXXX	02/08		01/11	
09/02	XXXXX	10/05	XXXXX	09/08		08/11	
16/02	XXXXX	17/05	XXXXX	16/08		15/11	
23/02	XXXXcX	24/05	XXXXX	23/08		22/11	
01/03	XXXXX	31/05	XXXXX	30/08		29/11	
08/03	XXXXX	07/06	cXXXX	06/09		06/12	
15/03	XXXXX	14/06		13/09		13/12	
22/03	ccccc	21/06		20/09		20/12	
29/03	ccccc	28/06		27/09		27/12	
Half days Term 1 : 4		Term 2 : 5		Term 3 : 0		Term 4 : 0	
Year : 9							
Current year summary details				Attendance audit trail details			

Figure 126: The student's attendance screen

The screen above displays the student's current attendance data. If you have MUSAC Absences this screen is not editable, otherwise you can enter student attendance directly. If you do have MUSAC Absences, this is where the data is maintained.

This lists, for each term, the weeks (Monday dates), the school's calendar days open, and the student's attendance pattern.



If a student leaves during the year, this will be shown, and if the student later returns during the year then this, too, will be displayed.

### 10.10 Renamable categories

These are fields attached to popup files which you can modify (apart from the first - Ethnicities - where the entries are specified by the Ministry of Education).

**Renamable categories for : Jimmy Abacrombie**

MoE ethnicities 1	Other groups	New Zealand Maori		
Religious Affln 1	Methodist			
Immunizations 1	Measles/Mumps			
Old ethnicities 1	Malay			
Category 5 1				
Category 6 1				
Excursion 24/8s 1	Library			
Category 8 1				
Category 9 1				
Daughter of O.G 1				
Category 11 1				
Category 12 1				
Sports 1	Athletics			

Figure 127: Renameable categories – Page 1

The bottom right button takes you to page two, which has a similar button to return you to this page.

You can alter the contents of the categories directly from this screen. Click on 'Configure renameables' to take you to the screen below.

**Use this process to rearrange your renameable categories**  
 You can : a) adjust which page each category appears  
 b) link the categories to the popup files of your choice.  
 c) display up to four columns for each category  
 d) adjust the entries within certain of the popup files

Title	Attached Popup	Shown columns
MoE ethnicities 1	MoE ethnicities	4
1	Special Type	4
1	SUMMER SPORTS	4
1	INTERNET USER	4
MERIT 99 1	MERIT 99	4
1	Mrit Cert94	4
1	Mrit Awards 2001 Ct	4
Mrit 2000 1	Mrit 2000	4
Merit Award 2001 1	Merit Award 2001	4
2001 Merit Cert 1	2001 Merit Cert	4
2001 Merit Badge 1	2001 Merit Badge	4
Prefect 1	Prefect	4
1	Mrit Cert 96	4
<b>Page Break</b>		
1	WINTER SPORTS	4
1	Old ethnicities	4
1	Merit 99	4
1		4
1		4
1		4
1		4
1		4
1		4
1		4
1		4
1		4
1		4
1		4
1		4
1		4

Figure 128: Adjusting the renameable categories

This screen lists all twenty six categories, with a page break in the middle.

If you click in the centre column then a list of all available popup files is displayed. This allows you to attach any popup file to any of your categories. For example if you required more than four entries for a particular category then you could attach the same popup to a second row.

Title	Attached Popup	Shown columns
MoE ethnicities 1	MoE ethnicities	4
Religious Affln 1	Religious Affln	4
Immunizations 1	Immunizations	4
Old ethnicities 1	Old ethnicities	4
Category 5 1		4
Category 6 1		4
Excursion 24/8s 1	Excursion 24/8	4
Category 8 1	Excursion 24/8s	
Category 9 1	Daughter of O.G	
Daughter of O.G 1	Sports	
Category 11 1	Gender	
Category 12 1	Nationality	
Sports 1	Language	
Page Break	School	
Category 14 1	Form next year	
Category 15 1	Group next year	
Category 16 1	Special Education	
Category 17 1	Hook fee	
Category 18 1	Yes/No	
Category 19 1	Qualification	4
Category 20 1	Iwi	4
Category 21 1		4

Figure 129: Attaching a category to a popup

**Note:** If you have connected popup data to students in a particular category then you alter the popup to which the category is connected then you could no longer select it from the popup list.

By changing the number in the right hand column you can reduce (but cannot increase) the number of entries against this category on the main documents.

Finally, having selected a particular row, you can rearrange the order in which it appears and can even move it across the page break. In the example below I've moved the category 'Excursion 24/8s 1' category to the top of the second page.

Title	Attached Popup	Shown columns
MoE ethnicities 1	MoE ethnicities	4
Religious Affln 1	Religious Affln	4
Immunizations 1	Immunizations	4
Old ethnicities 1	Old ethnicities	4
Category 5 1		4
Category 6 1		4
Category 8 1		4
Category 9 1		4
Daughter of O.G 1	Daughter of O.G	4
Category 11 1		4
Category 12 1		4
Sports 1	Sports	4
Page Break		
Excursion 24/8s 1	Excursion 24/8	4
Category 14 1		4
Category 15 1		4

Figure 130: Adjusting the display order

If you wish to edit the contents of a particular popup then click on the button at the bottom of the screen which takes you to the popup configuration utility.

**Note:** Not all popups may be edited. For example, MOE Ethnicities are specified by the Ministry of Education and will not be available for modification.



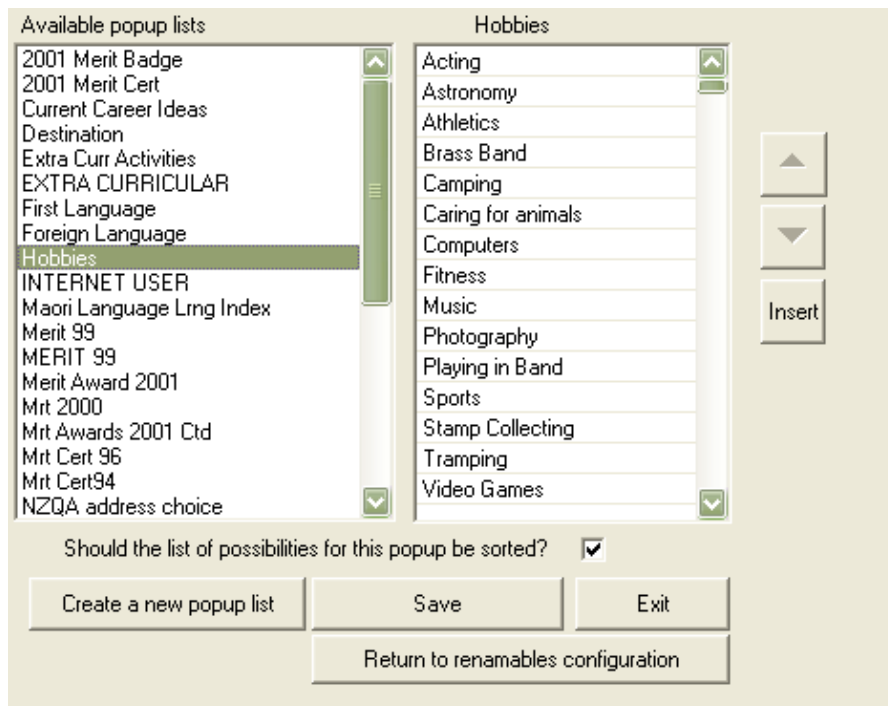


Figure 131: Adjusting popup entries

## 10.11 School-defined fields

**School defined entries for Jenny Armstrong**

Bike stand no.	1253	Fees '91	\$1500
Title 2		Title 4	
Title 5		Title 7	
Title 6		Title 8	
Title 9		Title 11	
Title 10		Title 12	
Fathers Work			
Mothers work			
Title 14			
Title 16			
Title 15			
Title 18			
Other siblings	Jessica Mary in 11HG		
Title 20		Title 22	
Title 21		Title 23	

Check on the use of these fields

Figure 132: The 'User-defined' fields

You can now click on the button at the bottom of the screen, and arrive at the following screen.

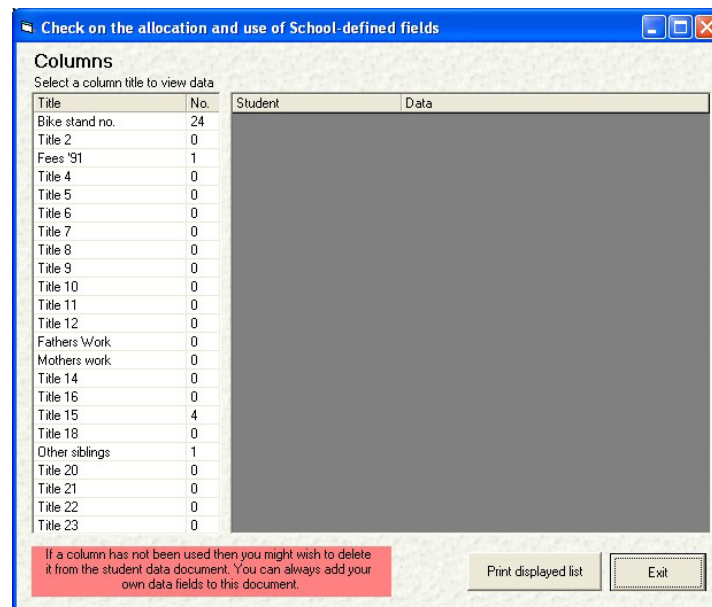


Figure 133: Checking the use of a field

This screen lists the fields and the numbers of students who currently have entries in them. Click on one of the numbers in the second column and the names of the students concerned are displayed on the right hand side, as shown below.

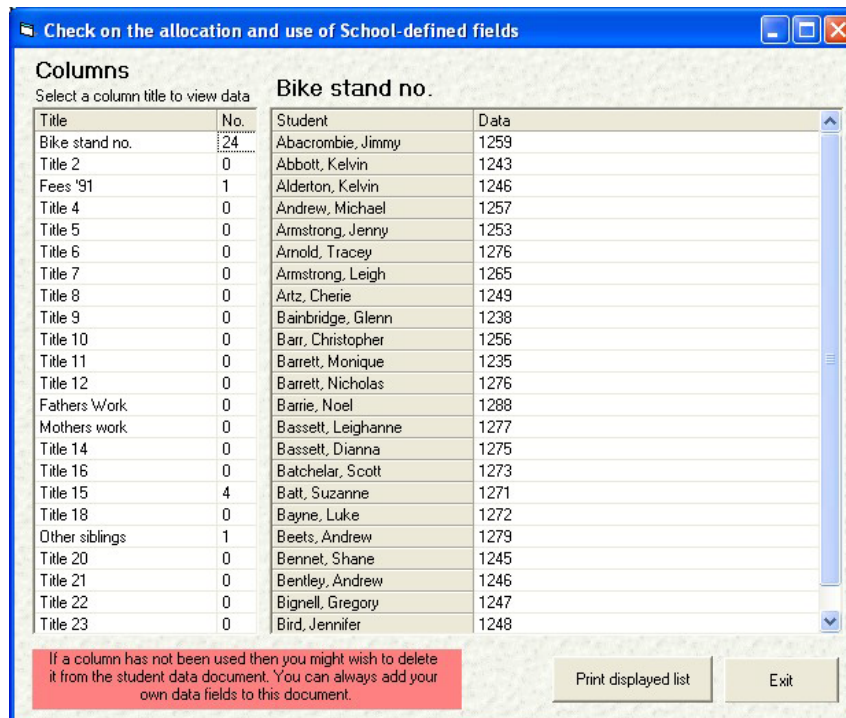


Figure 134: Students with entries in a field

You can print this list by clicking on the relevant button at the bottom of the screen.

To alter a field's title, select it from the left hand column and you will be able to edit it. (Press the space bar to begin the editing process).

Remember too, as the message says, that you can add you own fields to this and other documents via the editing process.

## 10.12 Photo album

Classroom Manager introduced the ability to save against a student more than one multi-media object – a picture, a sound byte or a video clip etc.

Student Manager makes use of this ability to allow you to store multiple photographs of each student and provides some 'Photo album' documents to allow you to do this.

An example of one of the albums is shown below.



Figure 135: The Years 1 to 6 photo album

To connect a photograph, right click in the empty (or full) photo area. The following capture window will appear.

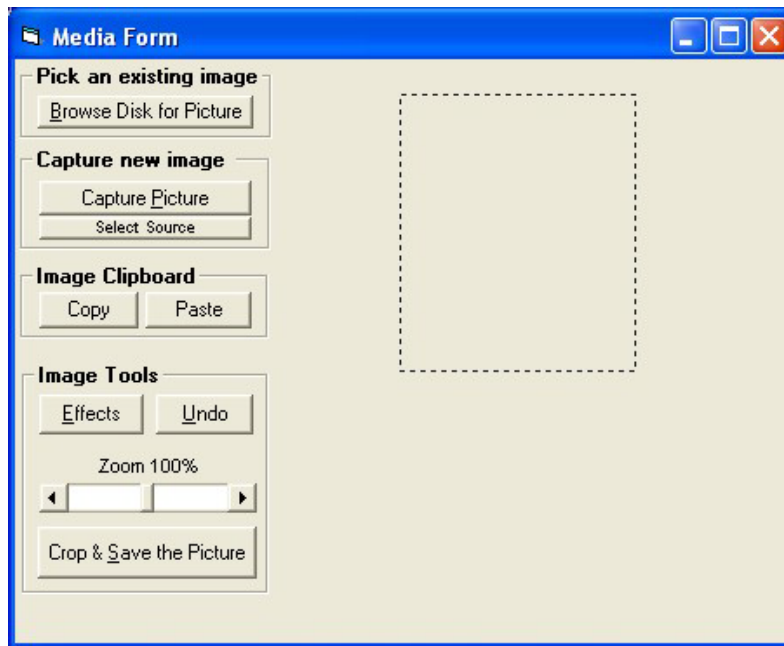


Figure 136: The image capture screen

If the image is to be captured from an external source (eg. a video camera) then Select the Source and Capture the Picture.

If the picture you require is already available then simply click on 'Browse disk for picture'. The 'File open' dialogue, shown below, will appear....

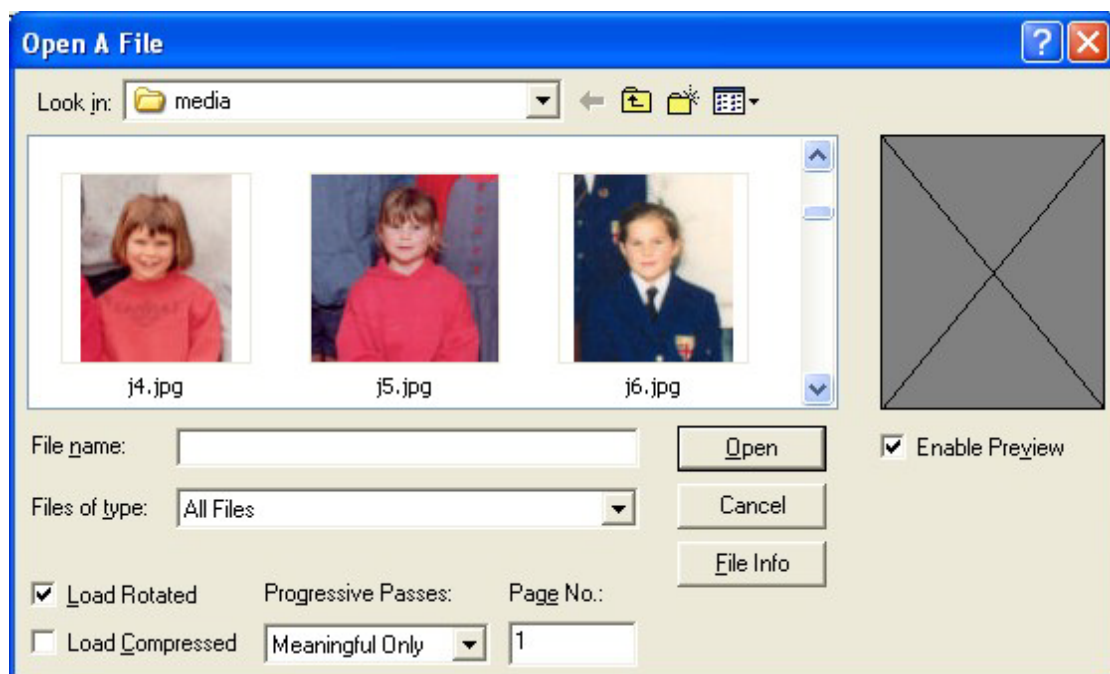


Figure 137: Selection of an image

... via which you may identify the required photograph. Select it and you will move back up a window, this time with the required picture available from editing.

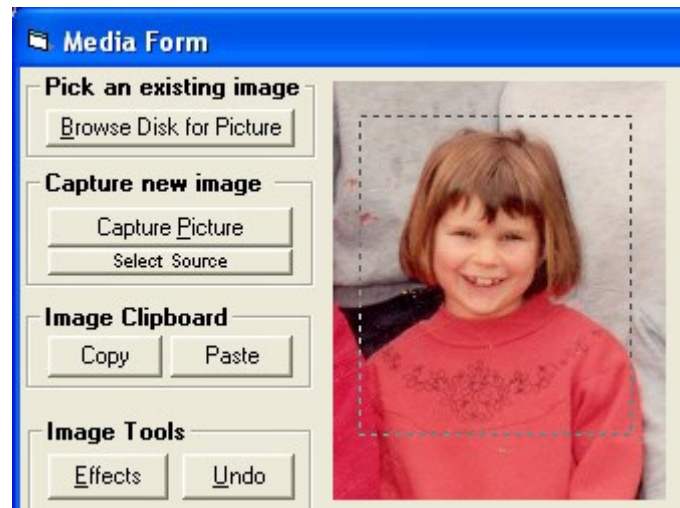


Figure 138: Adjustment of the size

Use the Zoom control to adjust the size of the picture and then centre the frame over the portion to be cropped as shown above. Once you are satisfied, click the 'Crop and save' button and your picture will be displayed in all its radiant beauty.

You can also capture handwriting examples, artwork, video clips etc.

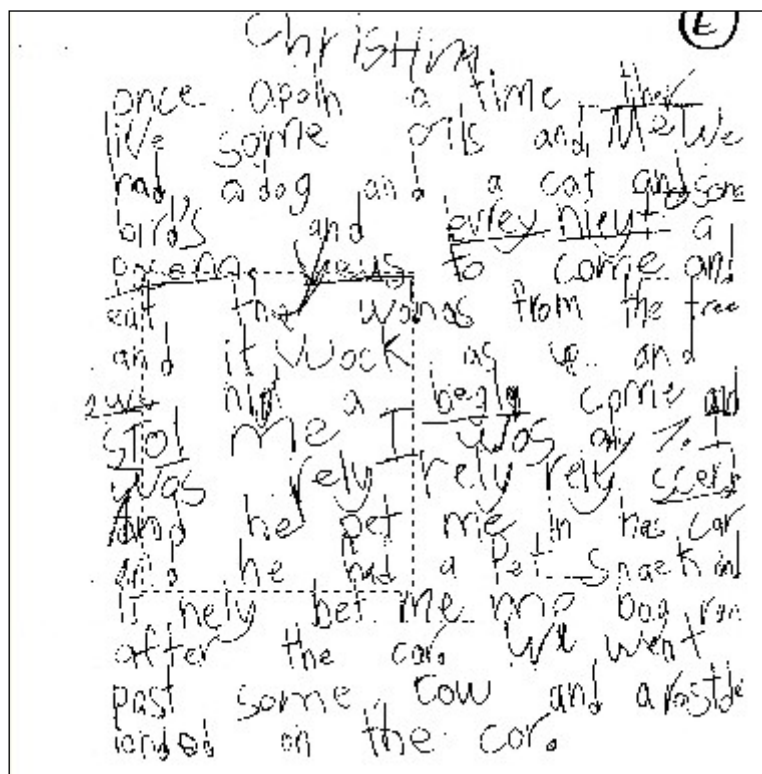


Figure 139: A handwriting sample

### 10.13 Notes

The main relevant document is 'Default Notes.dmt', shown below.



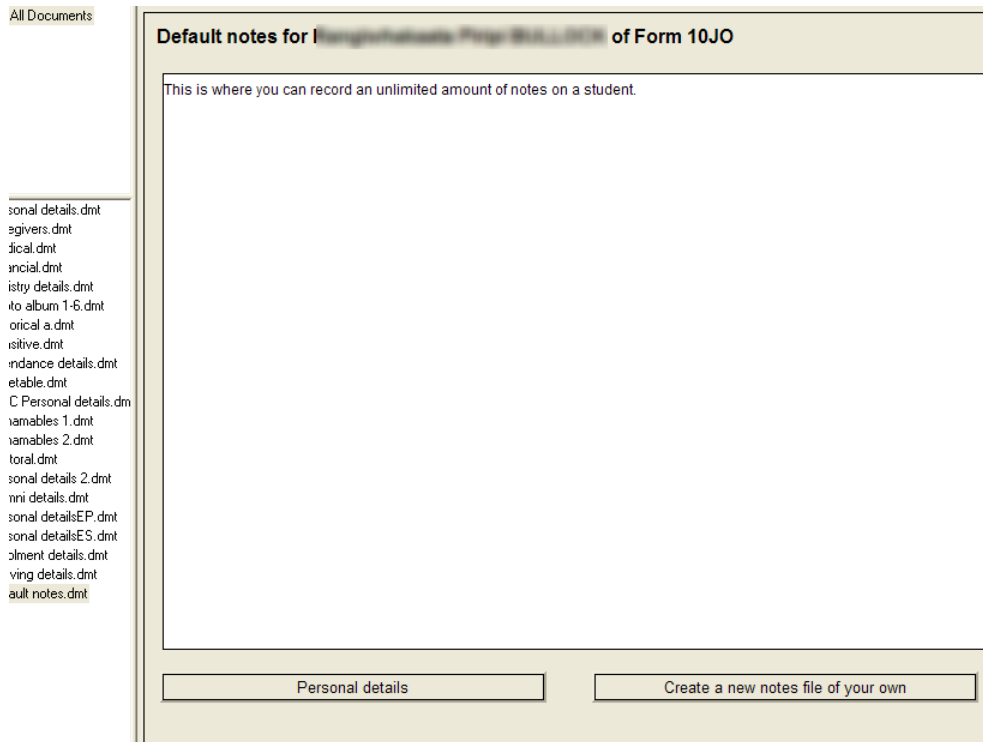


Figure 140: The 'Notes' document

The default notes are not pass-warded. The notes are, however, encrypted in the database so that they cannot be deciphered by those without proper access to the notes.

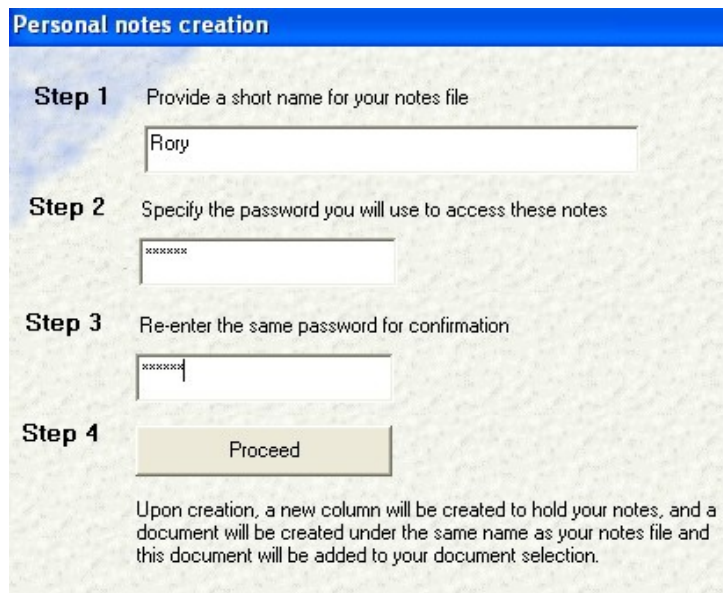
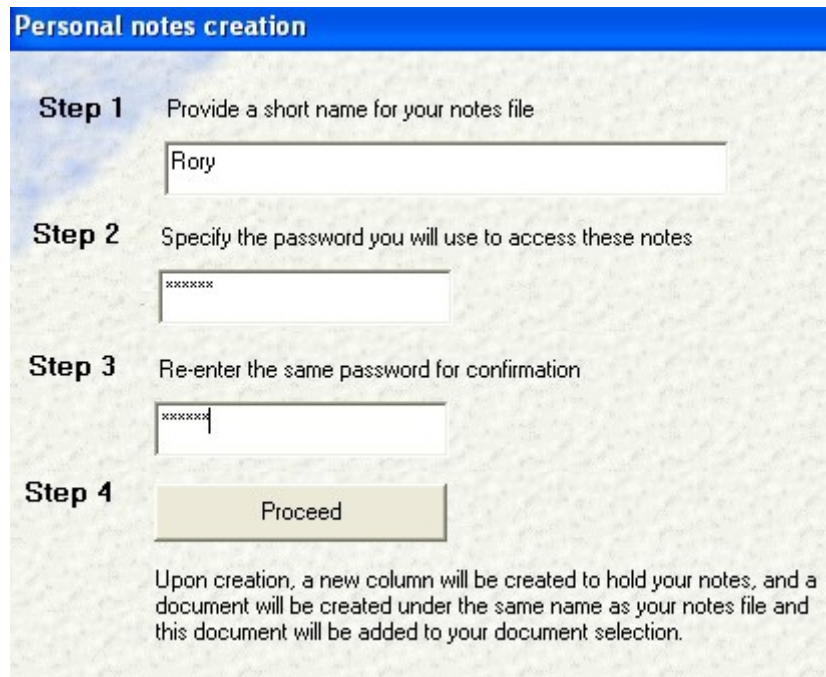


Figure 141: Creating a set of personal notes

However, to have your own personal password-protected set of notes click on the button at the right hand bottom of the screen. The following screen will appear.



**Personal notes creation**

**Step 1** Provide a short name for your notes file  
Rory

**Step 2** Specify the password you will use to access these notes  
\*\*\*\*\*

**Step 3** Re-enter the same password for confirmation  
\*\*\*\*\*

**Step 4** Proceed

Upon creation, a new column will be created to hold your notes, and a document will be created under the same name as your notes file and this document will be added to your document selection.

Figure 142: The specification is complete

Give your notes a name by which you will recognise it and enter a password twice. When you proceed you will be returned to the main screen where you will find that a new document has been created for you - named according to your set of notes.

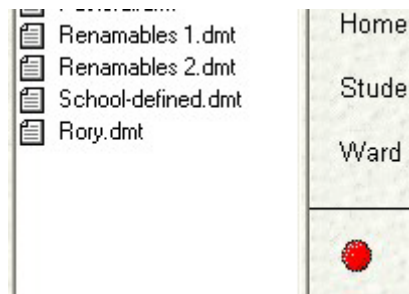


Figure 143: The new document appears in the menu

Select this document and you will be asked for the password.



**Password entry**

Please enter the password to view

Cancel Proceed

Figure 144: The password request

Enter the password and you will be able to type in your notes.

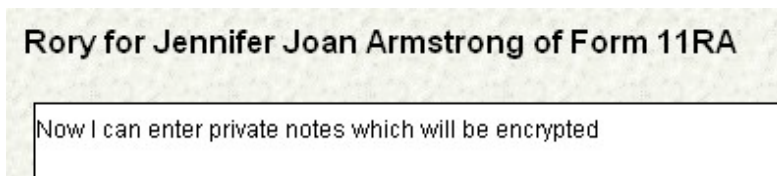


Figure 145: The entry of personal notes

Your correctly entered your password is remembered during your current session using the program. The next and subsequent times you visit your notes page you will be asked for your password. Previous to entering it you will be able to see that there are notes but they will be somewhat difficult to read!

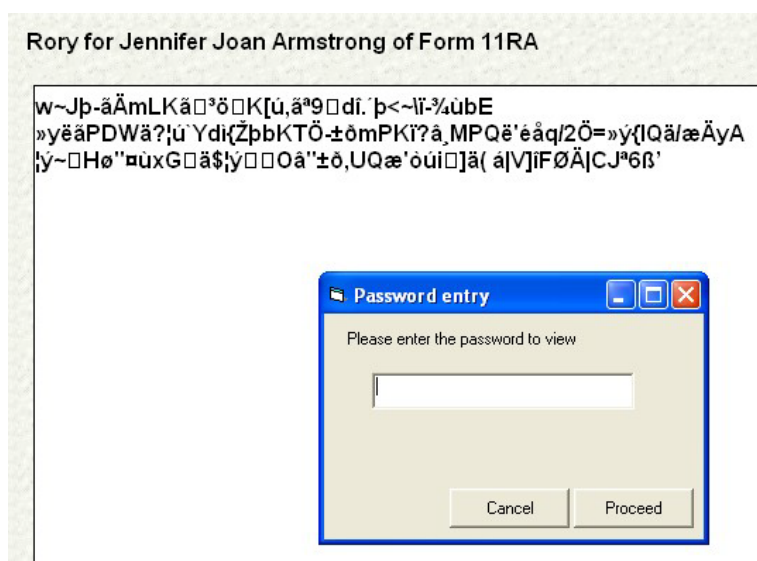


Figure 146: The view prior to entering a password

## 10.14 Alumni details

The following screen allows you to record details relating to ex-pupils and their details concerning the current school reunion



Alumni details.dmt ABACROMBIE, JIMMY	
<b>Alumni details</b>	
Student : JAMES JEREMY ABACROMBIE Year : 9 Form : 9HG Group : long	
Last known address details	
Address	16 CARGILL STREET
	LEVIN
Details confirmed	
<input type="checkbox"/> Yes	
Home phone	06 357 7766
Personal phone	021 123 4567
Email	jimjam@hotmail.com
Comment	
N.B. You may add your own new fields to this document	
Married name	
Qualifications	B.Sc.
Place of work	Hort. Research
Partner's name	Jenny
<b>Reunion details</b>	
Registration date	09/06/2004
Registration number	213
Partner attending	Yes
Reunion notes	07/06/2004 Rang to ask if partner could attend reunion

Figure 147: The 'Alumni' details document

## 11 Adding a New Student

There are several steps which you can take to automate the process of adding a new student; the setting of default data, and the nomination of a small selection of documents. You can, of course design your own data entry document to meet those needs peculiar to your school.

### 11.1 Adding a New Student

To add a new student to your database, click on the 'Add student' button at the top of the main screen.

The following window will appear.

Figure 148: The 'New student' screen

There are only seven items of information which are essential before a student can be added to the file. These are grouped together in the first section of the window.

If the new student has the same family name as an existing student already in the database then, once you have entered the family name matching students will be listed in a box on the right hand side of the screen. Only one match was found for Abbott, as shown below.

**Essential details for** Greymouth High Sch

Family name: Abbott  
First names:   
Preferred name:   
Date of Birth:   
Gender: Female

Once the family name has been entered, other students with the same family name will be listed below.

If you wish to duplicate selected details then select a name from the list.

ABBOTT, COLIN GEOFFREY  
Date of birth : 19/09/1991  
Year : 8

Figure 149: The recognition of other students with the same family name

If you wish to duplicate the caregiver and address details of one of the existing students then select that student from the right hand list, as shown below.

If you wish to duplicate selected details then select a name from the list.

ABACROMBIE, JIMMY  
ABBOTT, KELVIN  
ALDERTON, KELVIN  
ANDREW, MICHAEL  
Armstrong, Jenny  
ARNOLD, TRACEY  
ARNOTT, LEIGH  
ARTZ, CHERIE  
BAINBRIDGE, GLENN  
BARR, CHRISTOPHER  
BARRETT, MONIQUE  
BARRETT, NICHOLAS  
BARRIE, NOEL  
BASSETT, DIANNA  
BASSETT, LEIGHANNE

Selected sibling : ABBOTT, COLIN GEOFFREY

Select an unlisted student

Figure 150: Selection of an unlisted student

Fill in the rest of the essential details.

A trick or two are necessary to do this without using the mouse;

- Gender, just press the 'M' or the 'F' key.
- Ethnicity - to select New Zealand Maori, just type the letter NEW and press <Enter>. To select NZ European, just type 'NZ' and press <Enter>.
- Status, just type the first letter of the required status if you require 'Full time' or 'Part time' student.
- For ethnicity and status, if you require one of the other possibilities then you might have to resort to the mouse.

Below the essential details are some optional ones you might wish to enter at this point.

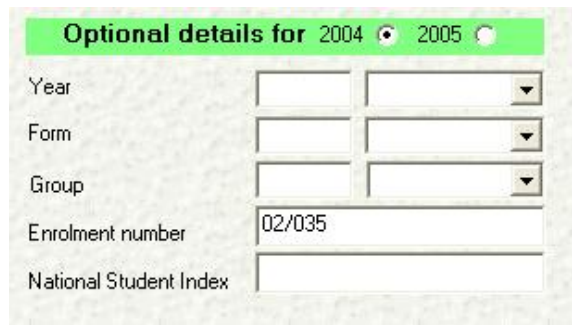
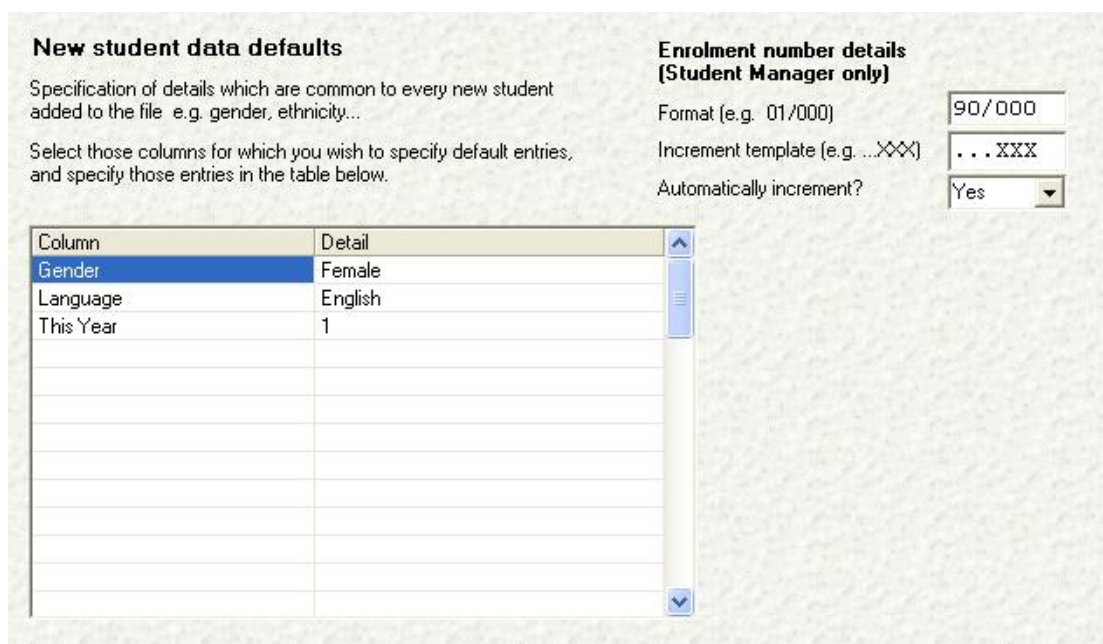


Figure 151: The non-essential details

The first three can be entered by either typing them into the text boxes on the left or selecting the entries from the dropdown lists on the right. In either case, your entry, when complete, should be reflected in the 'other' box. i.e. BOTH boxes should select your entries in each case. If not, then it is possible that an entry on the left has been misspelt.

Along the top of the screen are four tabs. We've now dealt with the first of these.

The second allows you to specify default data entries which you wish to apply to every new student. Click on the second tab and the following screen will be displayed.



**New student data defaults**  
Specification of details which are common to every new student added to the file e.g. gender, ethnicity...

Select those columns for which you wish to specify default entries, and specify those entries in the table below.

Column	Detail
Gender	Female
Language	English
This Year	1

**Enrolment number details (Student Manager only)**

Format (e.g. 01/000)

Increment template (e.g. ...XXX)

Automatically increment?

Figure 152: The new student default entries

The table on the left displays your current defaults. Three have been entered and another is about to be added.

Click in the left hand column, the 'Column' column, and the 'Column selection tool', shown below, will appear. (See an appendix for full details concerning the use of this tool.)

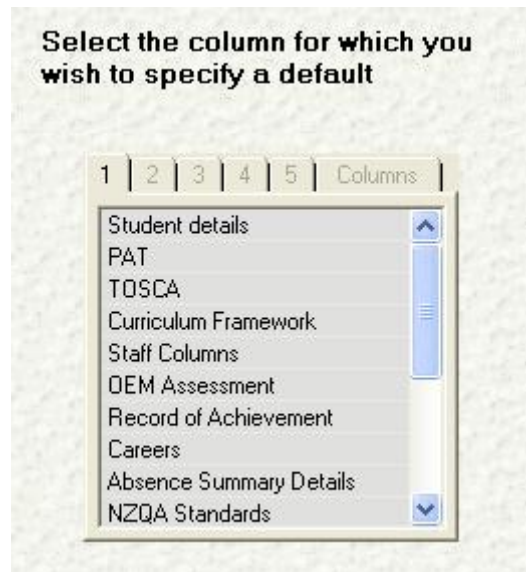


Figure 153: The column selector

By selecting 'Student Details', followed by 'Renameable categories 1', followed by 'MOE Ethnicities 1' (for that is the column for which we wish to make a default entry), the following display results. The column name has been entered into the left hand column and the program has recognised that this is a popup list, so has displayed the list for you to make your selection.

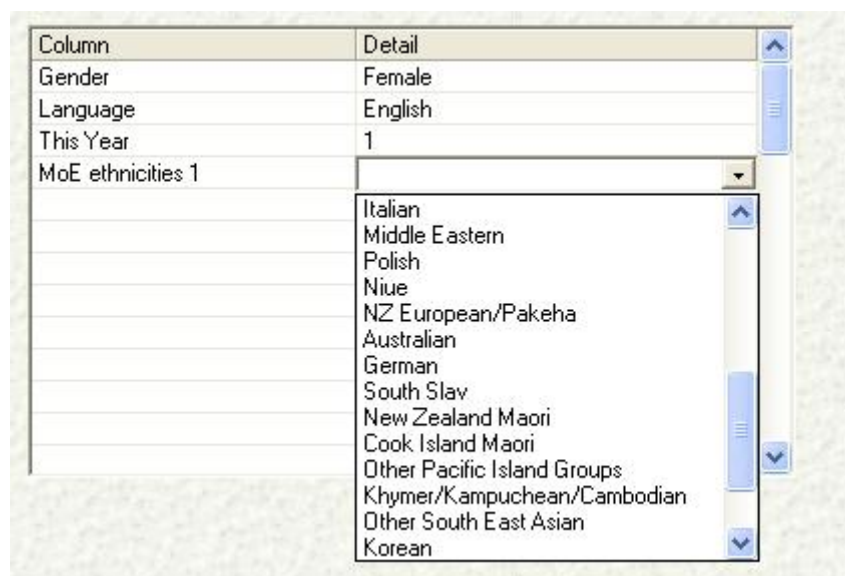


Figure 154: Selection of popup entry

The default settings will appear on each new student entered into the database. It is, of course, inevitable that they will not all be correct for every student and you will need, in these cases, to visit the relevant student data screen to make the necessary change.

The third tab allows you to select those documents (from your personal list of documents) which you wish to appear when you are adding a new student. It is likely that you will not wish to visit every one of your documents each time a new student is entered. Hence, you can select just those which you wish to have appear.

The first, 'Personal details', is essential of course.

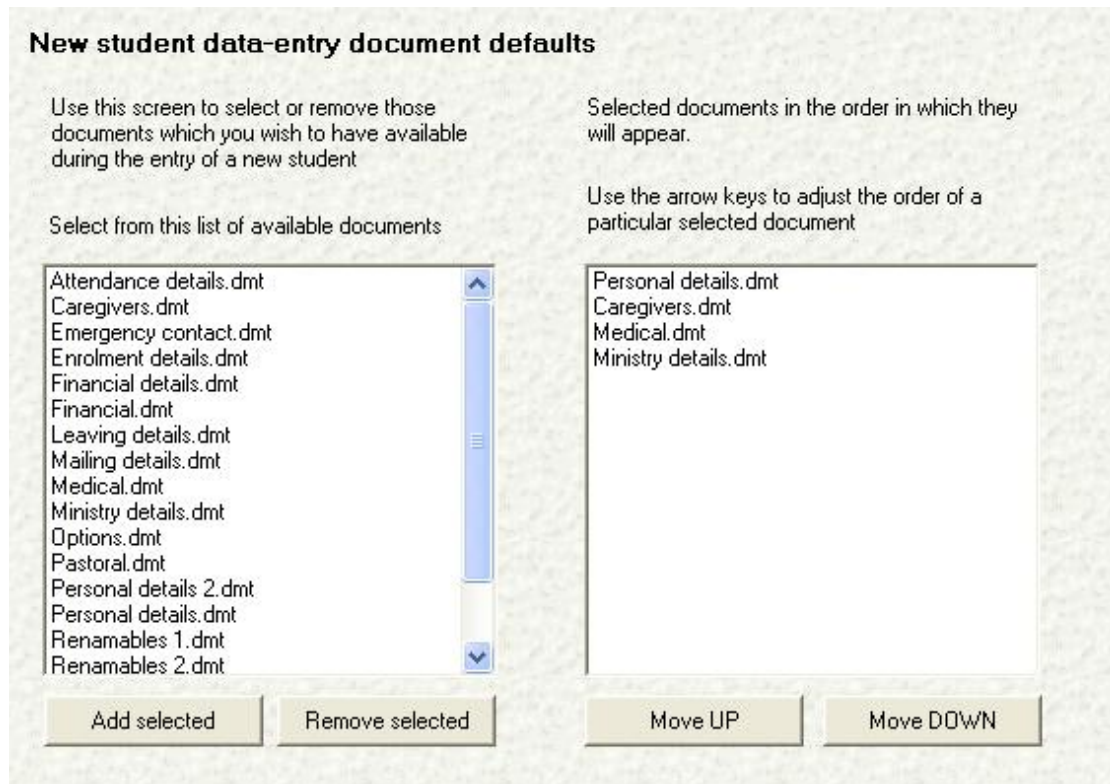


Figure 155: Selection of the 'new student' documents

Select your requested documents, adjust their order, and, as you finish adding a new student by clicking the large green-surrounded 'Proceed with this student' at the bottom of the first screen, you will be returned to the main data entry screen, with your new student visible in the first document.

The screen capture below illustrates just four visible documents. To redisplay all of your documents click on the yellow 'All documents' folder at the top of the left hand side of the screen. The reduced selection will only apply when you return to the main screen having 'Proceeded' with a new student.



Figure 156: The four selected 'new student' documents



## 12 Creating Documents

- 1 Design of a new document and the printing of a document.
- 2 Secondly the process of printing documents. An example of printing a letter is included at the end of each of the two sections.

### 12.1 Creating a new document



In the bottom left corner of the main data entry screen, providing that you have been given the right to access it, is a button labelled 'Add document'. This button lets you through to the process whereby you can design your own data entry documents for students.

The first window you will see is shown below.

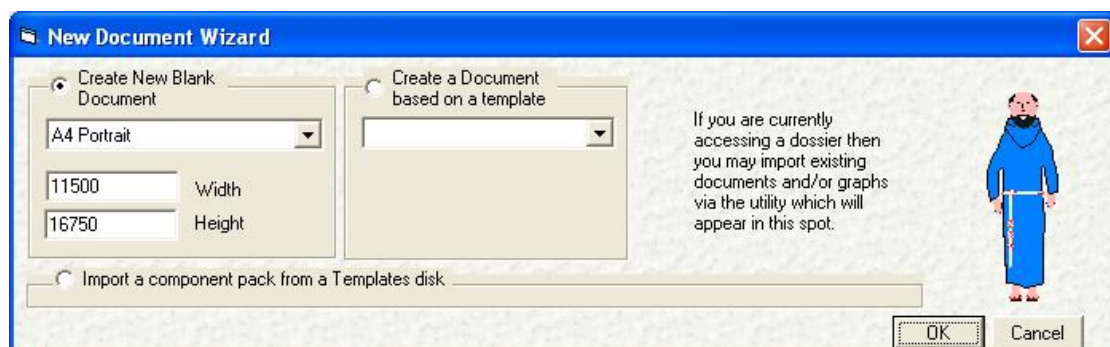


Figure 157: Creation of a new document

You are really only concerned with the first of the three possibilities on this screen - 'Create a new blank document'. The other two are more relevant to Classroom Manager processes.

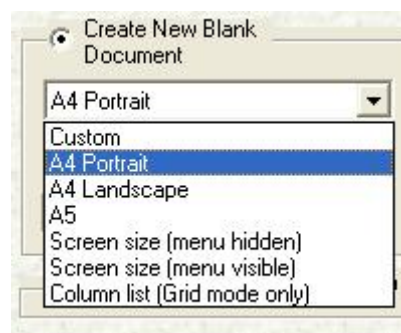


Figure 158: Selection of the document size

Click on the dropdown list and select your document size. For the purposes of Student Manager we have used the 'Screen size (Menu visible)' option. Having made your selection you will return to the main screen which should now be covered in dots! It will also have some new buttons along the top and down the left hand side you will see a bar called 'Design Tools'.

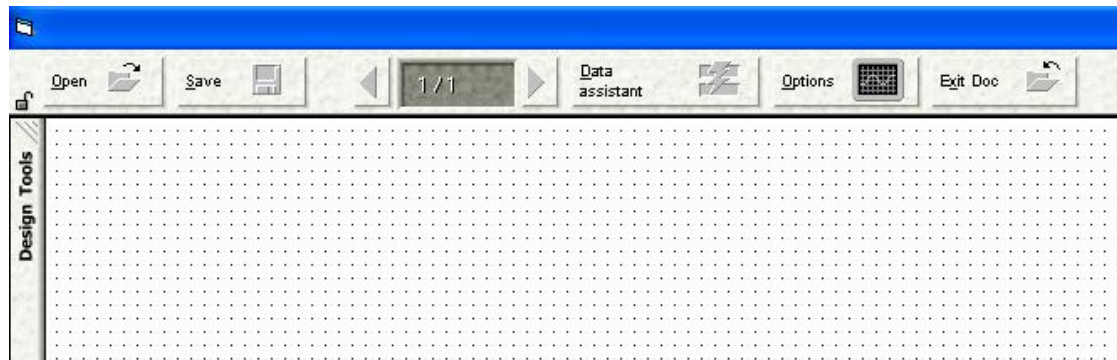


Figure 159: The 'Design Tools' toolbar

First, click on the small lock in the top left hand corner of the display (to lock the toolbar in place) then hover your cursor over the 'Design Tools' bar. It will slide out and will, as requested, be locked in place. If we had not locked it then it would slide away every time we needed it!

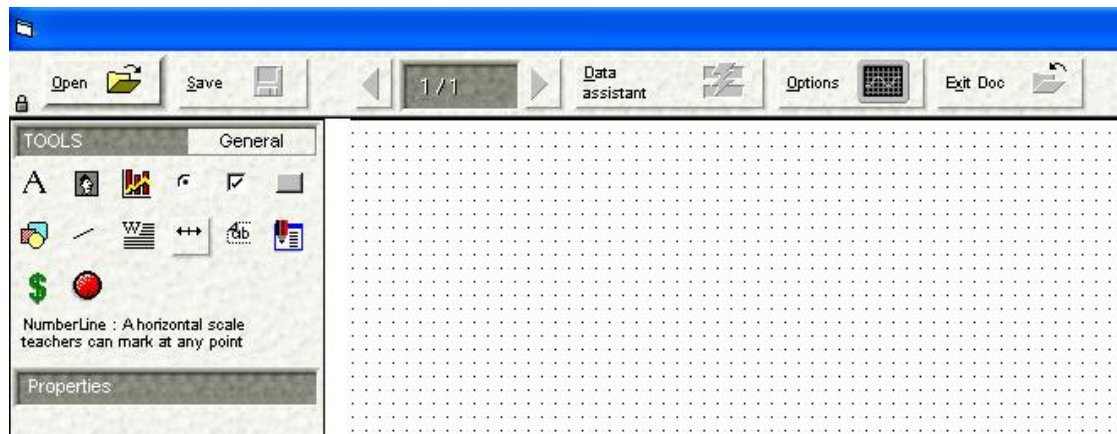


Figure 160: The Tool tray in the 'out' position

This tool bar displays the variety of objects which you can place on a document. Several specific to Classroom Manager have been removed, and we shall deal with those remaining - some in detail and some in passing.

Here is a summary of the tools' functions.





Figure 161: The available objects (tools)

Let's look at the Word processor tool first. That's the one in the middle with a W and looks a little like a USA flag.

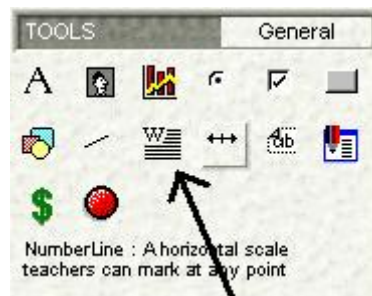


Figure 162: The word processor

Click on this tool to select it then move your mouse back to the dotted area. Holding the left mouse button down, drag a rectangle out over an area of the 'document' grid.

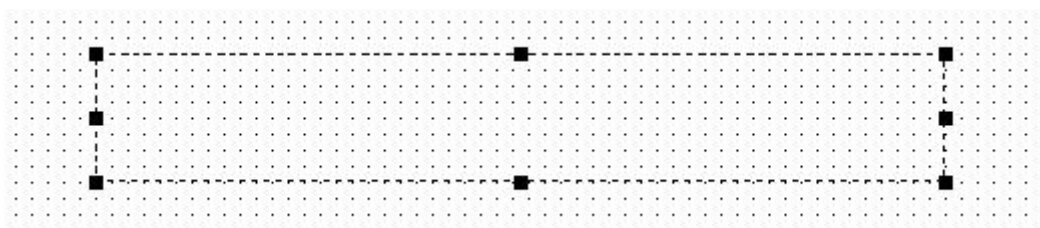


Figure 163: An object dragged on to a document

This is the size and shape of our word processor tool. This area will NOT be connected directly to a data column, but will display whatever we type in to it. Frequent uses for this tool are ; your school name, complex labels, or data from the student which is NOT editable via this document.

For example, it is wise NOT to make students' names editable as then every staff member using your document would be able to change students' names. NOT a good idea!

If you right-click in the word processor then the following menu will appear. The choice that we are interested in is the last.

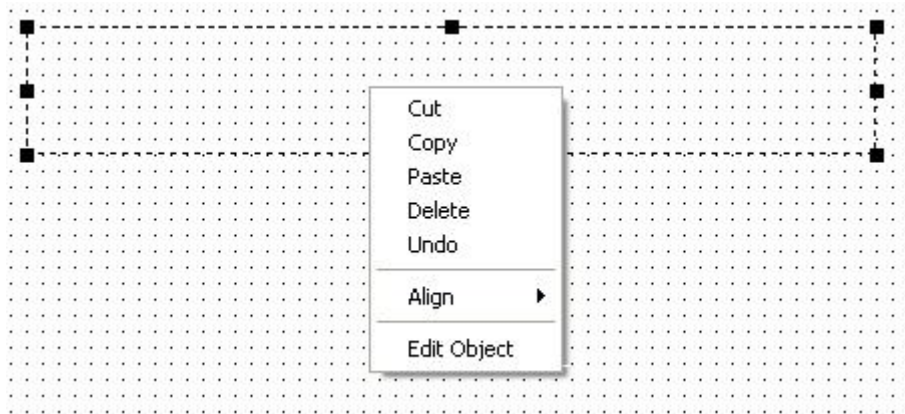


Figure 164: The right-click menu

Select the 'Edit object' option and the word processor will appear, as shown below.

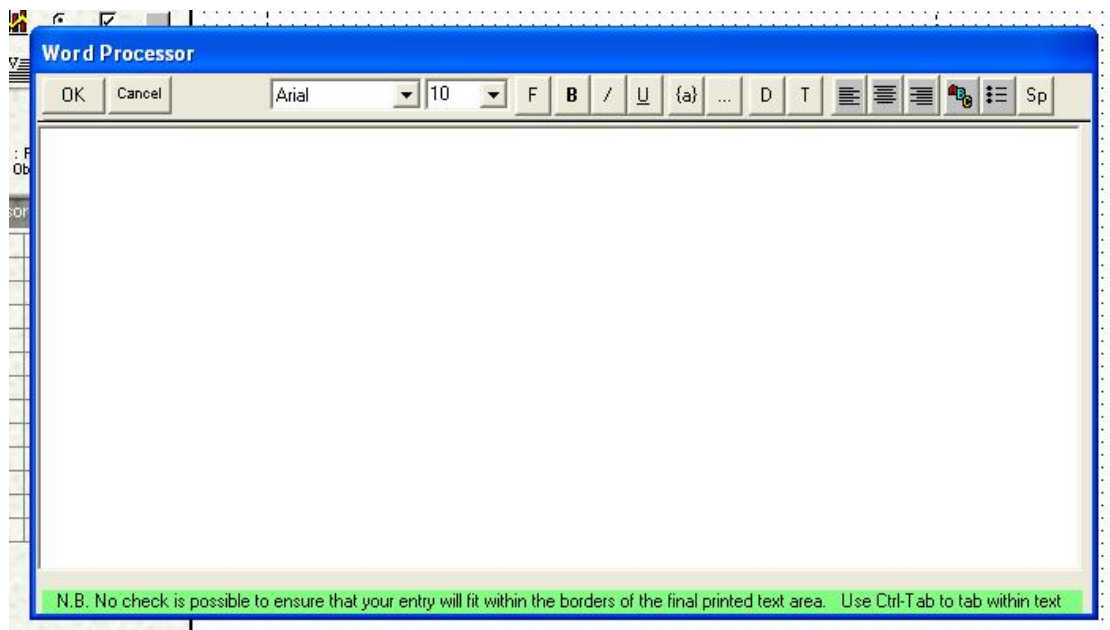


Figure 165: The word processor

It has the usual array of word processor buttons along the top and we'll assume that you are familiar with the majority of these - eg. Bold, Italics, Underline, left, centre and right aligning, font colours and tabs. The last key 'SP' turns the automatic spell-checking on or off.

Type in some text – for example : your school's name?



Figure 166: An entry in the word processor

Highlight it (by dragging the mouse cursor back across it). I've now changed the font name and size...

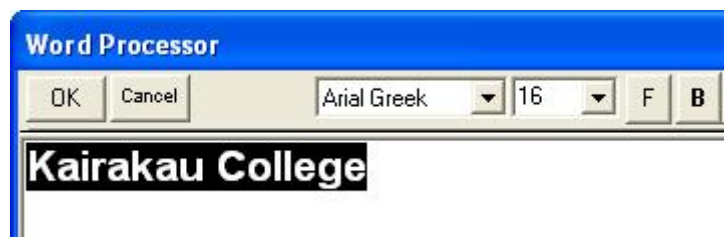


Figure 167: The change of font

... and also clicked 'Bold' on.

If you now click the 'F' button (for Font) you will be given the option to make this choice your personal default font.

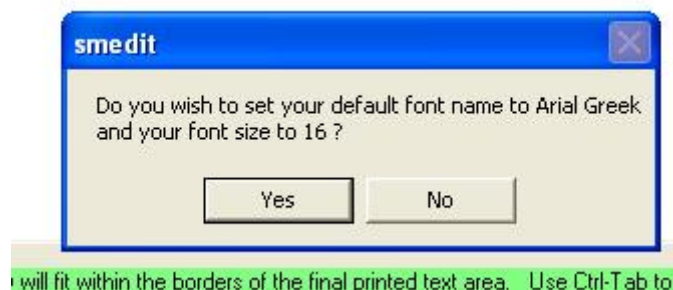


Figure 168: Saving the default font

It is now time to visit the {a} button. This button allows use to select from a wide range of codes, each of which will result in a student specific entry when the document is viewed or printed for a particular student. (It's really a mail merge with a variety of extra features).

Up will pop what is known as the 'Code insertion' tool – as it is used to insert a code into text in the word processor. (A full description of the use of this tool is provided in an appendix to this manual)

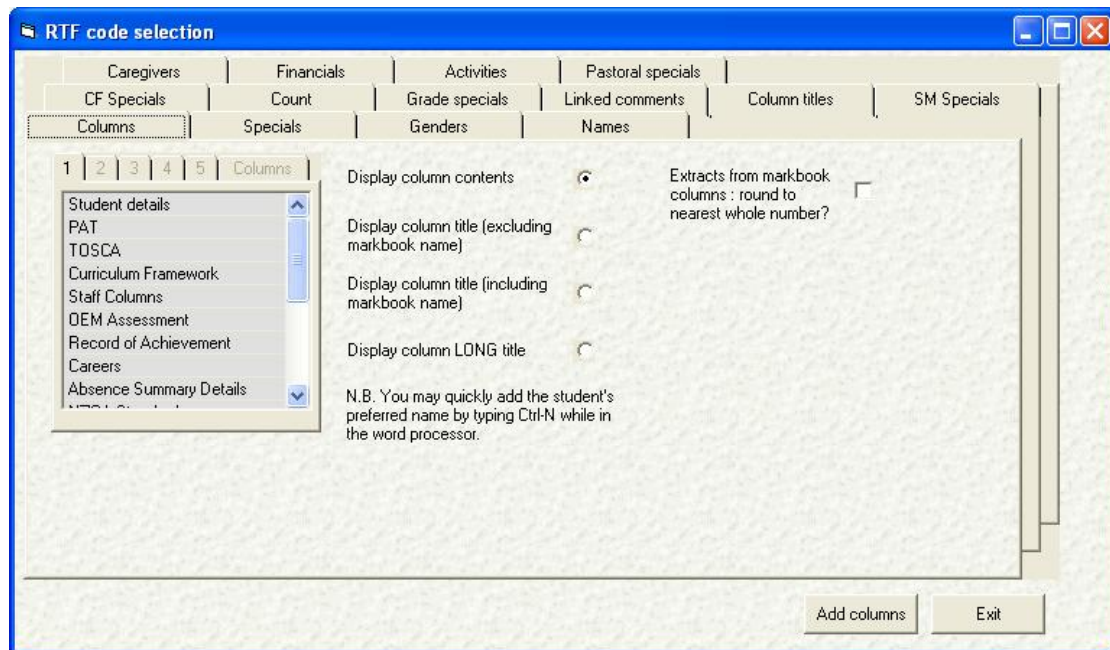


Figure 169: The 'insertion tool'

This has many tabs, and we shall visit a few of them here. The first one is 'Columns'. This allows us to simply extract a piece of student data from the database.

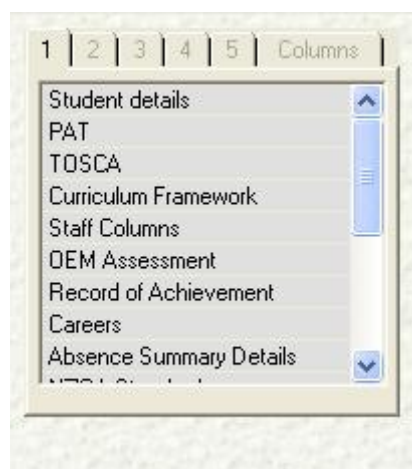


Figure 170: Selection of a column

Use the 'Column picker tool' on the tab to navigate via 'Personal Details' to select 'Mail to Whom' - the students caregiver(s) name(s). (A full description of the use of this tool is provided in an appendix to this manual)



Figure 171: Finding the 'Mail to whom' column

Select the 'Mail to whom' entry and the following code will appear in the word processor. This indicates to the program that, when printing for a particular student, the code should be replaced with the contents of the 4<sup>th</sup> column of data for this student in the cm database.

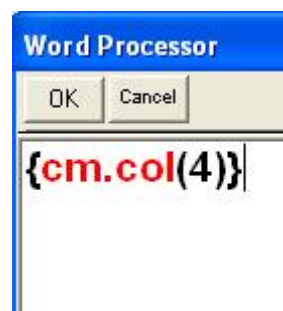


Figure 172: The inserted code

The red cm.col indicates a possible spelling mistake, but I'm happy with it.

**Note:** Do NOT edit the brackets in these displays. They are essential and if you were to remove one it would probably render your document invalid. We have salvaged documents for those who have insisted on being too adventurous.

Using this tab you can extract data from any column in the entire CM database. Other tabs provide access to other data and derived data (i.e. that which is calculated at the time of the extraction)

## The 'Specials' tab

Figure 173: The 'Specials' tab

This provides access to the fields shown above.

The SM Specials tab provides access to certain fields which are Student Manager specific.

Figure 174: The 'SM Specials' tab

Figure 175: The 'Caregivers' tab



## The Caregivers tab

First select the required caregiver from the dropdown list in Step 1, then select the field which you wish to extract for this caregiver. An example of the code inserted as a result is shown below.

```
Caregiver 1 Name  
{cm.cg(145)}
```

Figure 176: The inserted code

The 'Pastoral Specials' tab - allows you to report on details relating to pastoral transactions. These are relevant when designing a document which relates to a specific transaction - eg. the 'Smoking letter'.

Caregivers	Financials	Activities	Pastoral specials	Columns
These specials apply to a particular pastoral transaction - as passed to the pastoral document printing routine		These specials apply to all of a particular student's transactions in the current year		
Transaction date	Comment	Total pastoral points		
Teacher name	Action	Total offence points		
Detail 1	Action comment	Total merit points		
Points 1	Other	Number of offences		
Detail 2	Time taken	Number of merits		
Points 2		Number of supports		
Detail 3				
Points 3				

Figure 177: Pastoral specials

The Green Dollar sign generates the 'Financial' object. This is the basis of financial documents; invoices, receipts or statements. These will be dealt with in the chapter dealing with the design of financial documents. In the example below, the object has been placed and is, initially at least, designated as an invoice.

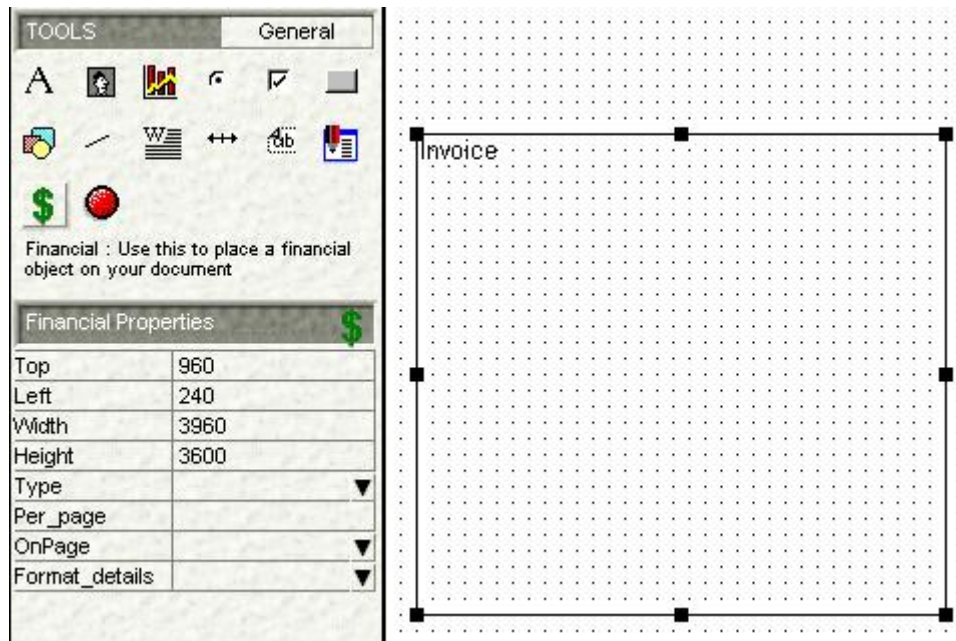


Figure 178: A 'Financial object'

The red dot appears on the 'Personal details' document when a student has entries in either their medical or sensitive information fields. Here's how it works.

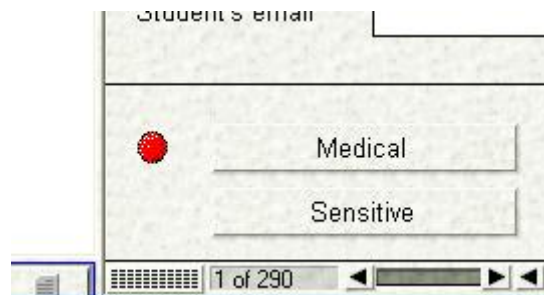


Figure 179: The 'Alert' object in use

Place a 'red dot tool' on your document. Then click on the 'Columnlist' property. The column selection tool will appear and you can select one or more data columns. If a particular student has an entry in one or more of the selected columns then the red dot will be visible for that student. The easiest way to place a data entry box on to your document is to use the 'Data assistant'

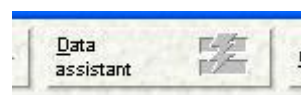


Figure 180: The Data Assistant button

Click on the button above your document and the following dialogue will appear.



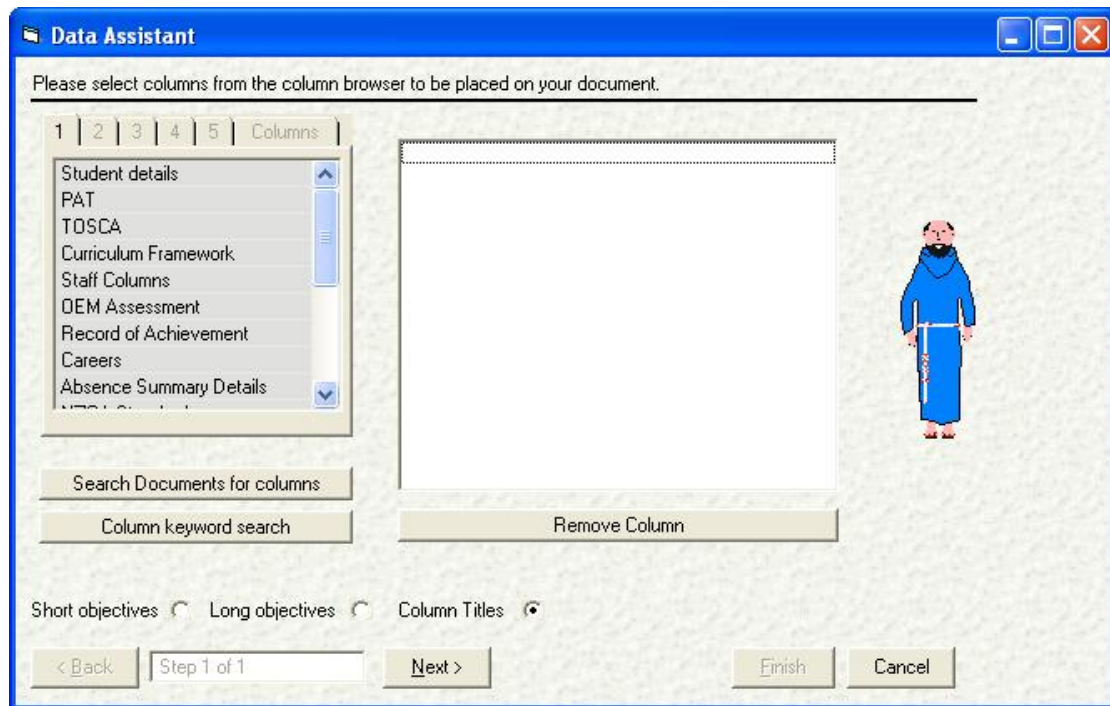


Figure 181: The Data Assistant screen

Use the column picker tool to select those columns for which you wish to create data entry fields on your document. I've selected a few from 'Personal details' / 'Ministry of Education'.



Figure 182: Selecting columns in the Data Assistant

Once you have made your selection, click next and you will arrive at the ultimate stage. This is where you select how you wish the fields to be displayed on your document. The most useful one, used virtually exclusively in student Manager, is the fourth one down, as shown below.

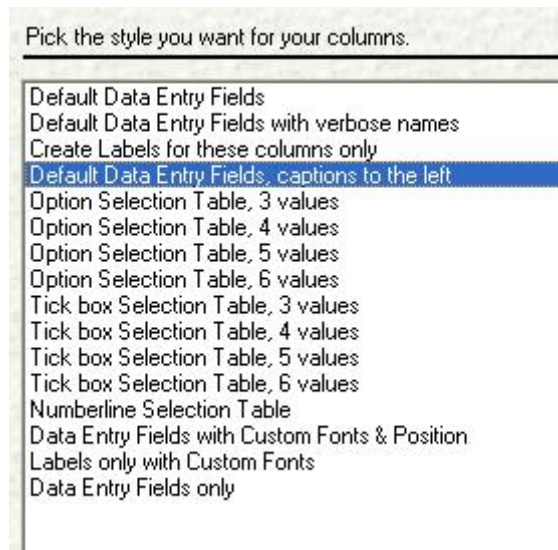


Figure 183: Selecting their appearance

Select this and click next, and you will be returned to your document with one or more blue boxes jammed in the top left hand corner.

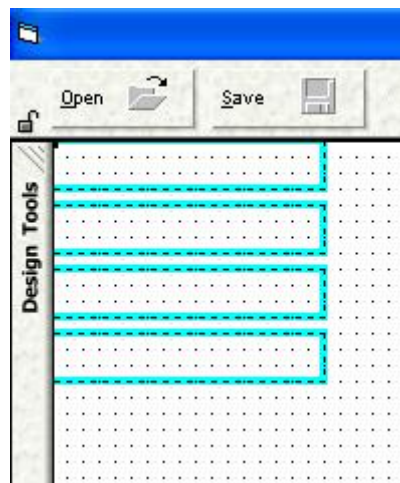


Figure 184: Four newly placed objects

Select them (with the mouse!) and slide them to a more useful place on the document. The turquoise borders indicate that more than one object has been selected. Once you have them in roughly the right position click elsewhere on the document to release the selection. The blue borders will become black.

In the Fees paid example below, it is selected and dragged a little higher.

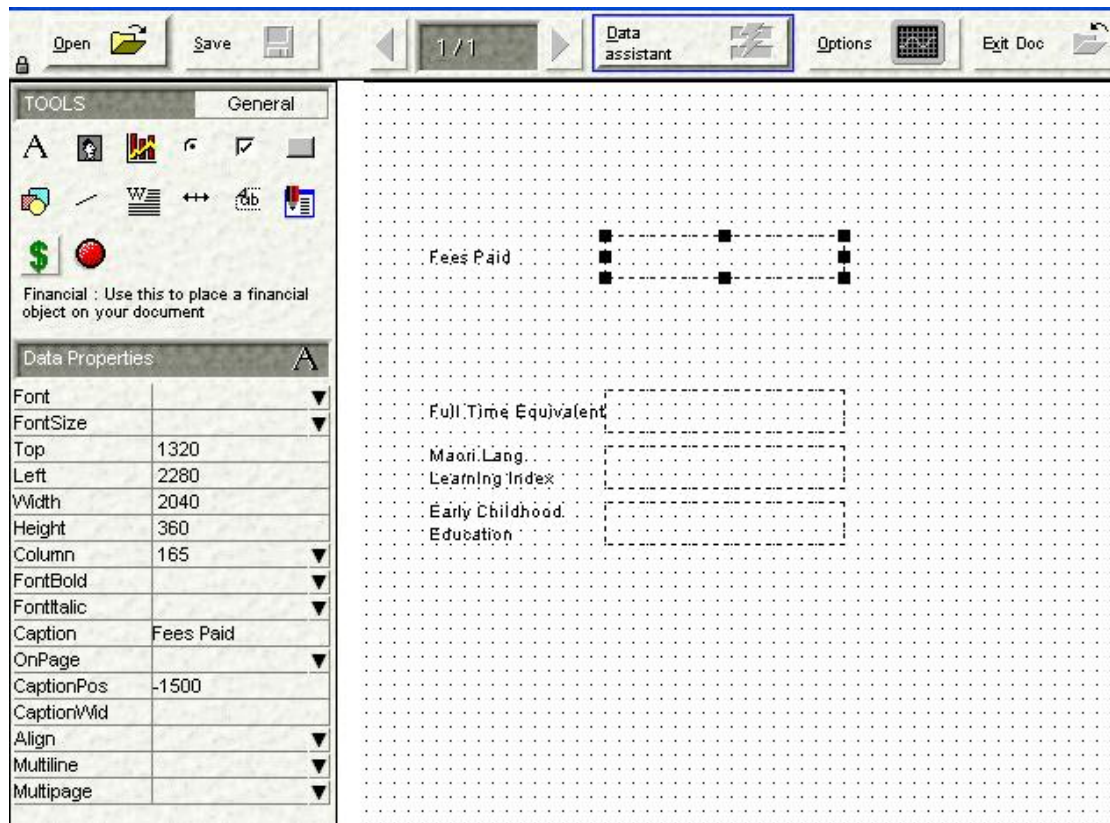


Figure 185: The four objects moved

When it was clicked, it gained boundary boxes - to indicate that it had been selected. The properties of the currently selected object are displayed in the lower half of the left hand side of the screen. This is where you can alter the properties. eg. You could change the caption, or the caption position (which is currently -1500 i.e. 1500 twips to the left of the object).

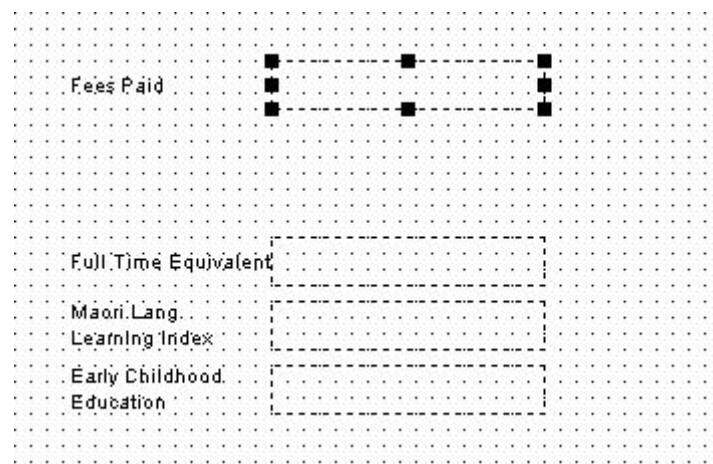


Figure 186: A single selected object

If you elect to change the font by clicking in either of the first two properties then the font dialogue will appear. Please ensure that you make a selection from ALL THREE of the properties - Font, Style and Size.

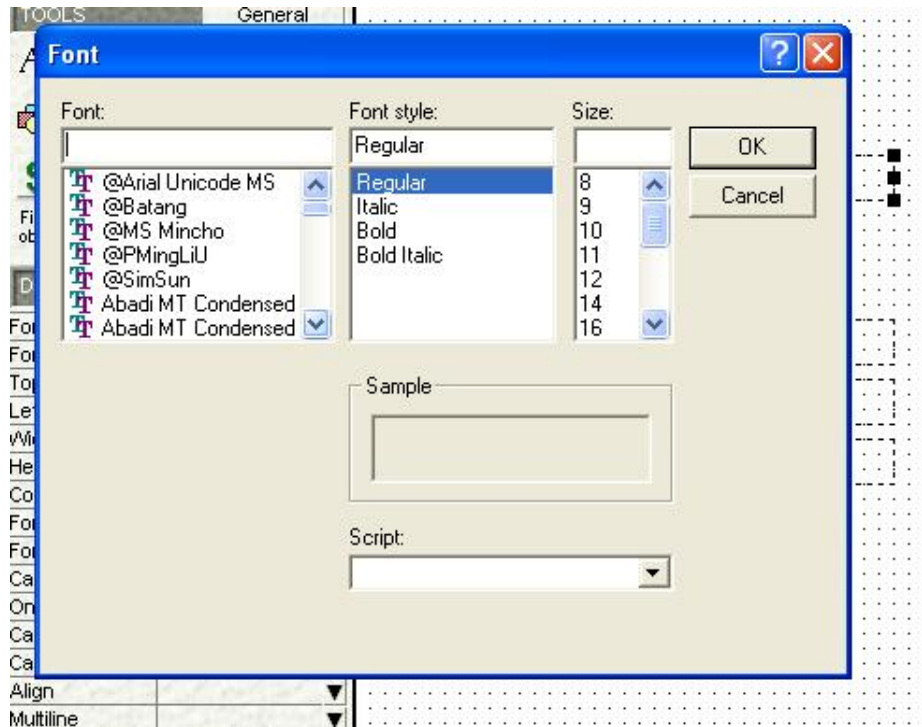


Figure 187: Selecting the font

**Note:** To put the student's name on the document, re-select all of the data entry fields by dragging the mouse over them.

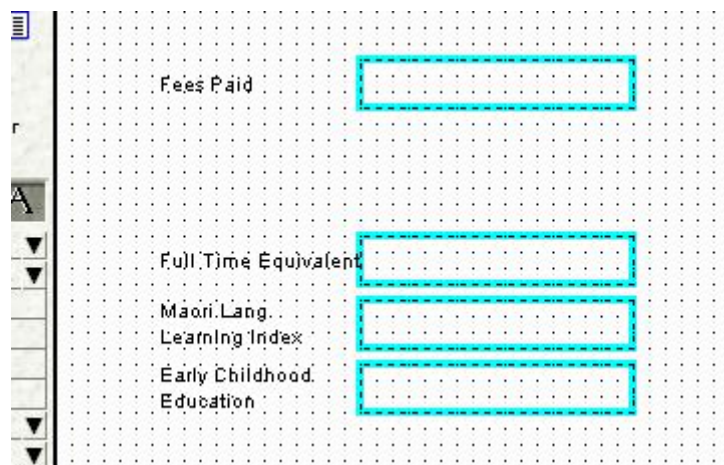


Figure 188: The four objects reselected

... and reposition them a bit further down the screen. Then place another word processor on the document in the gap created and right-click / edited it, and use the {a} button to link to the student's preferred name followed by their family name. This is visible in the screen capture below.



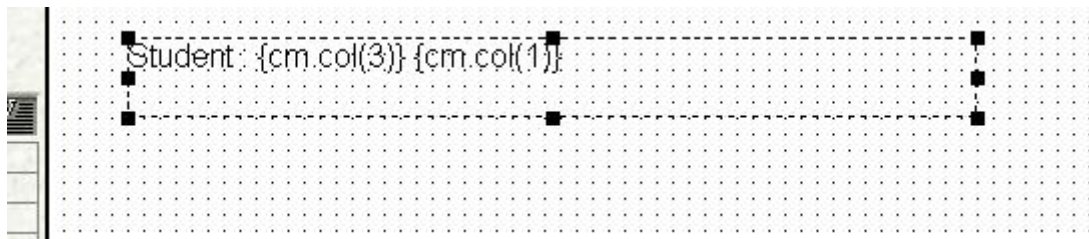


Figure 189: The student's name in a word processor

Next we shall put the student's photograph on the document, Select the picture object and place a 'Photo' on the document - over on the right hand side. There are two properties of the photo in which we are interested, depending on its purpose. If we simply wish to display the same picture on every copy of this document (eg. a school logo) then we click on the 'Filename' property. The following dialogue appears which enables me to select a picture image from the \CM directory. (You are restricted to images in this directory). In the example below we are contemplating prep10.gif.

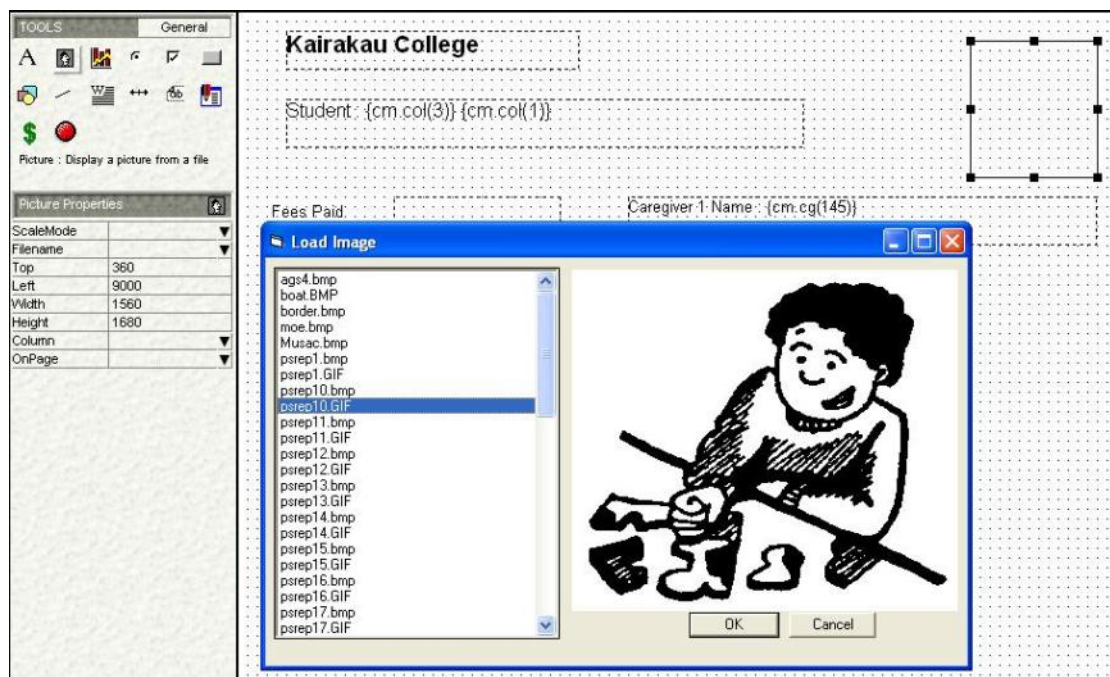


Figure 190: Selection of a picture

For a student's photo (or artwork or handwriting or video clip or audio track) to appear in the document, click on the 'Column' button and select the field which holds the filename of the photo for each student.

Student Manager comes with a full set of columns dedicated to this purpose - under 'Personal details' / 'Photographs'

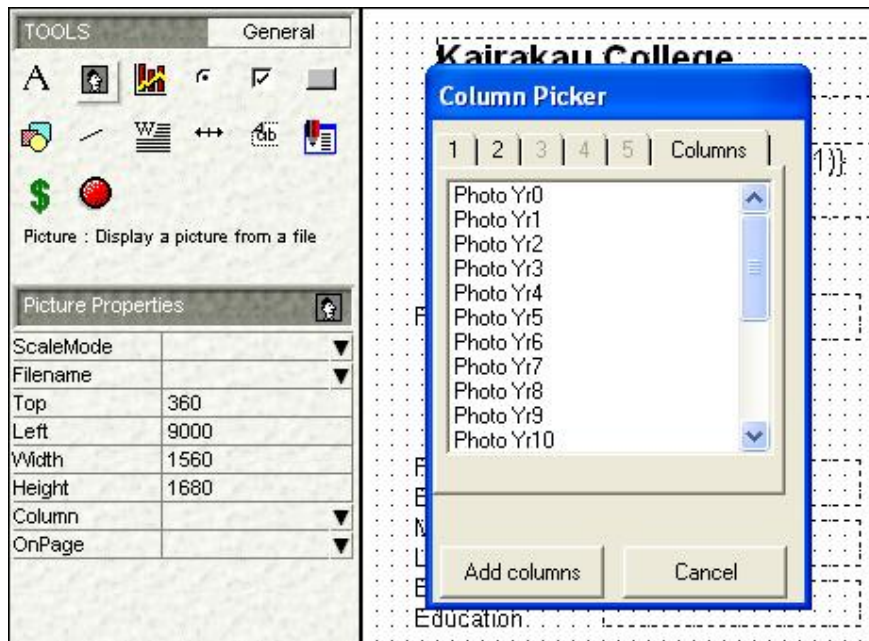


Figure 191: The year-photographs columns

Alternatively, under 'Student details' / 'Personal' you can find the column entitled 'Page 1 photo' - as shown below.

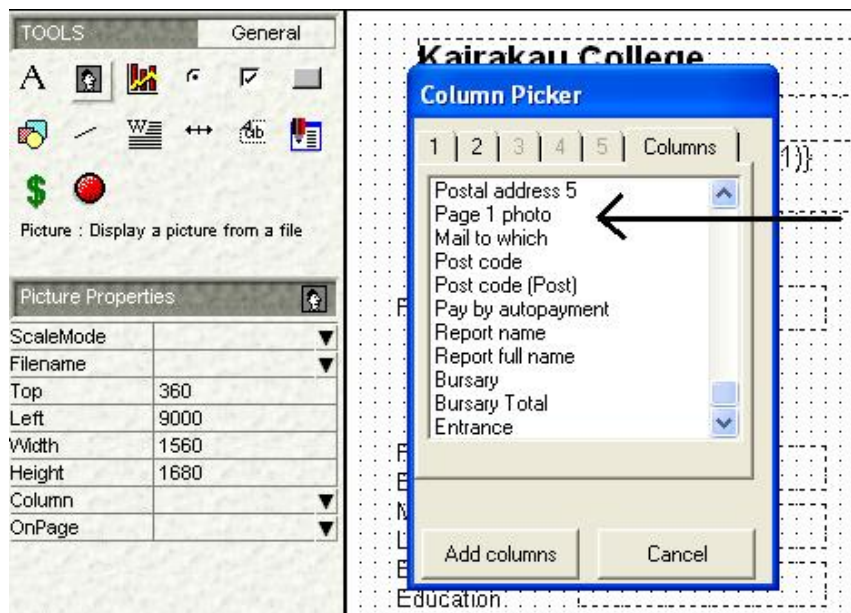


Figure 192: The Page 1 photo column

Click on the 'Options' button at the top of the screen and you can change some of the settings via the window below.

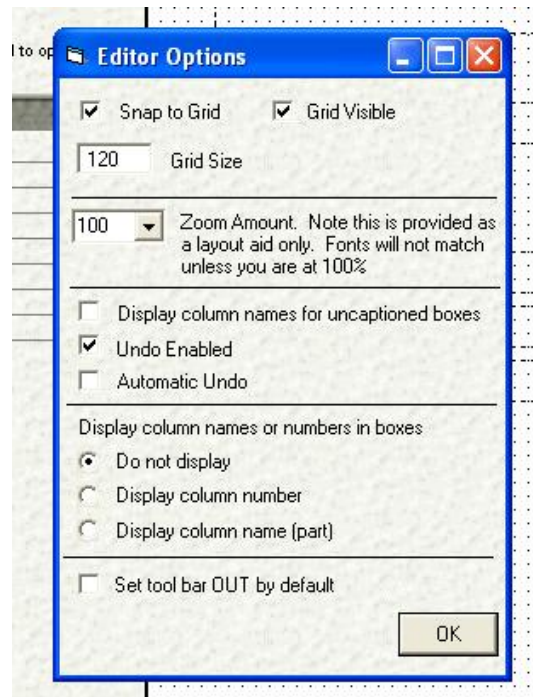


Figure 193: The editing options

The 'zoom amount' is useful when you wish to move an entire group of objects about a document. By setting the zoom amount to eg. 50 you can see them all in one screen relatively easily. This applies, of course, when your document is larger than 'screen size'.

'Snap to grid' is great if you are happy to be restricted to objects being aligned to the displayed grid. On several occasions in the development of the data screens for Student manager we had to turn 'Snap to grid' OFF - in order to get the best alignment. (Beware : If you edit the standard documents with grid mode turned ON then clicking on some objects will cause them to realign to the grid - destroying the beauty which we had so carefully created for you.)

How do you align objects? Simply select the objects which you wish to align, then right click to view the popup menu. Select 'Align' and then either top or left, as shown below.

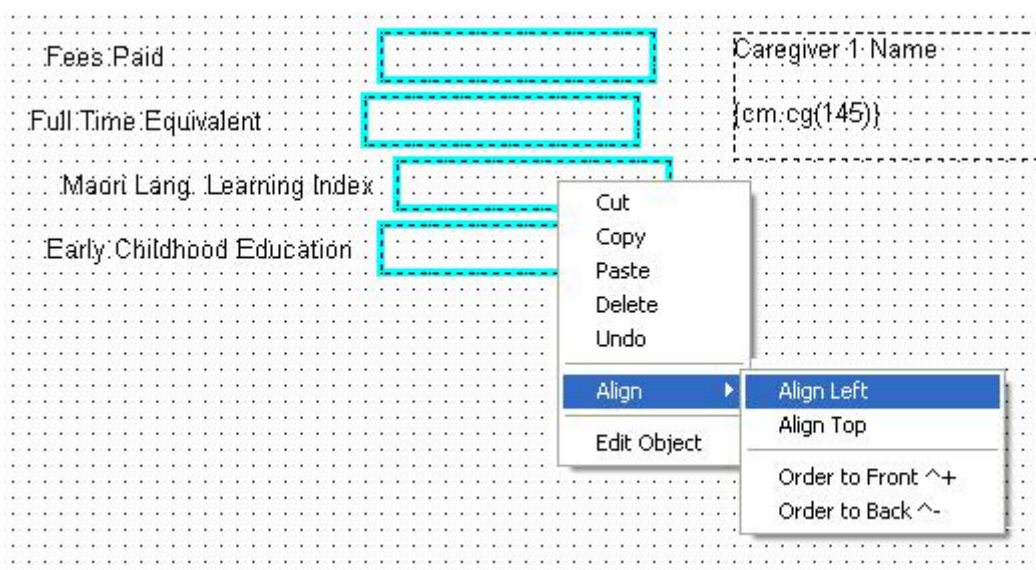


Figure 194: Alignment of several objects

Now save our document. Click on the 'Save' button in the top row and, via the resulting dialogue, give your document a name.

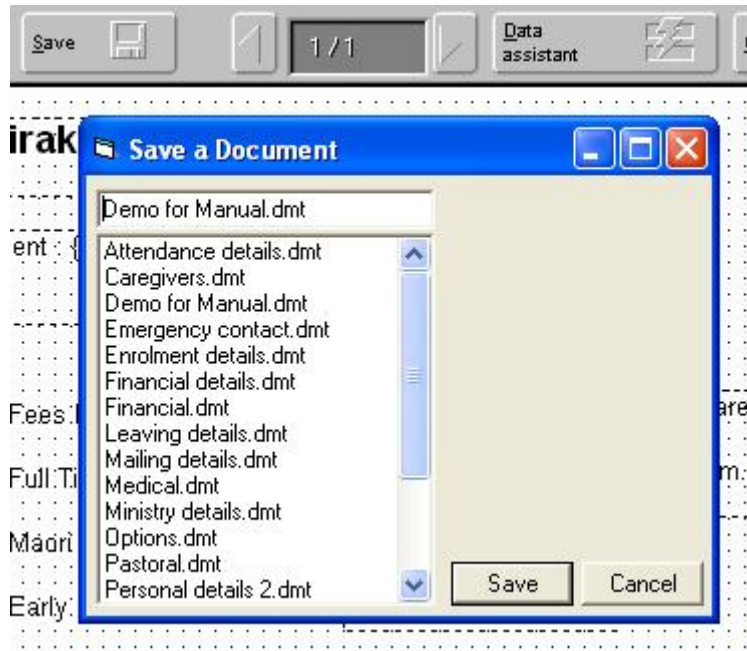


Figure 195: Naming your document

As you save it, you will be asked whether or not you wish to add the new document to your personal list of documents, as shown below.

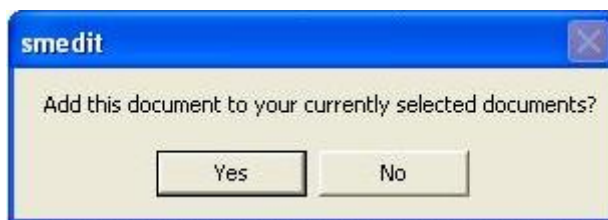


Figure 196: Adding a document to your personal list

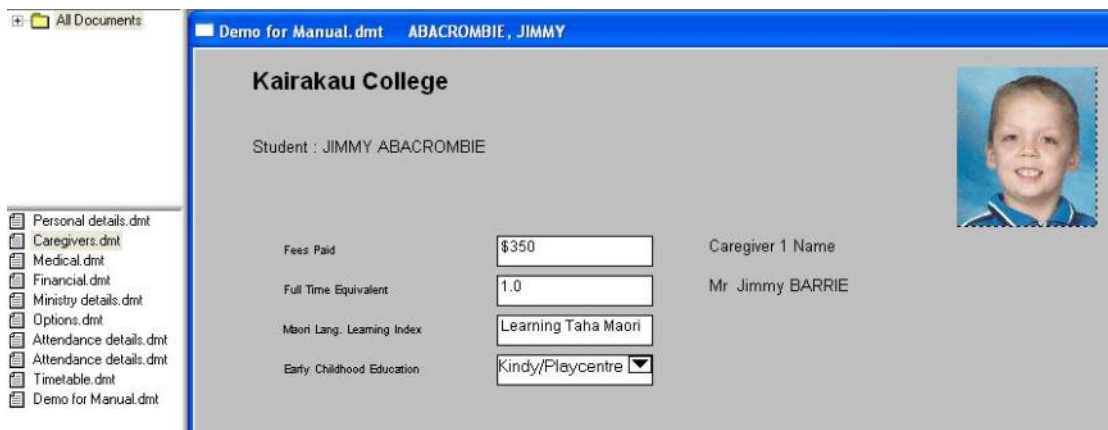


Figure 197: Your document in use



Now, when you return to the main screen, your document is available for selection - and data entry, as shown above.

Any data already entered in the fields via another document will, of course, be immediately visible.

Remember that documents can also be stored in your own private subdirectories.

If you have a directory available (Created via utilities - document management) then it or they can be accessed by clicking in the + button to the left of 'All documents' in the top menu panel. Your directories will be displayed. If you create a document while in one such directory then it will be stored there.

You can move documents between directories via the same utility - 'Document Management'.  
To edit an existing document:

- 1 Right click on the document name in the left hand menu.

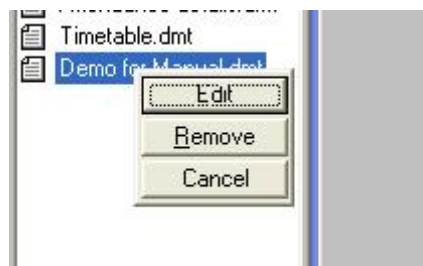


Figure 198: Right-clicking on a document in the menu

A small popup menu will appear via which you can elect to edit the document. This will take you directly into edit mode on the selected document.

- 2 Right click on a document while it is open and the following menu will appear. The second option on the menu allows you to edit. However if you edit an open document and remove one or more data entry fields or objects, the program will not know about this until you close the document and reopen it. This menu is shown below.

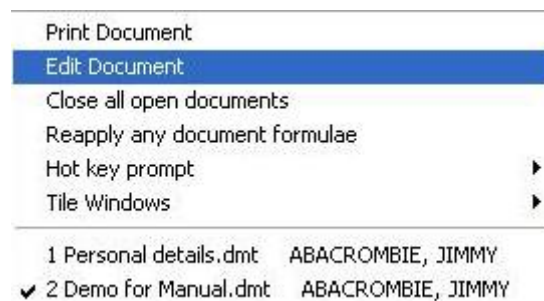


Figure 199: Right-clicking in the document itself

For a document designed to be printed as a letter, drag a large word processor box out across the document.

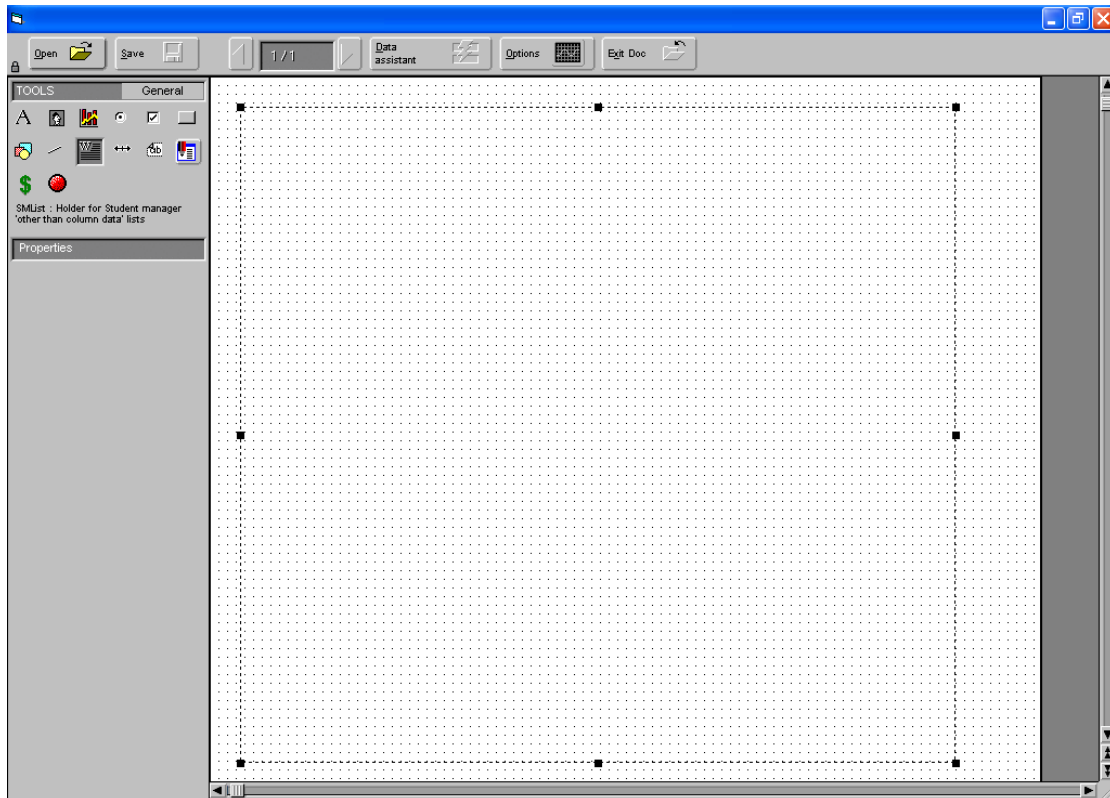


Figure 200: The empty word processor

Next edit it, writing your letter as the contents of the word processor. Of course, along the way, you will frequently use the {a} button to insert code into your letter wherever you come to a point where a student- specific entry is to appear. An example of a possible letter, complete with the inserted codes is shown below.

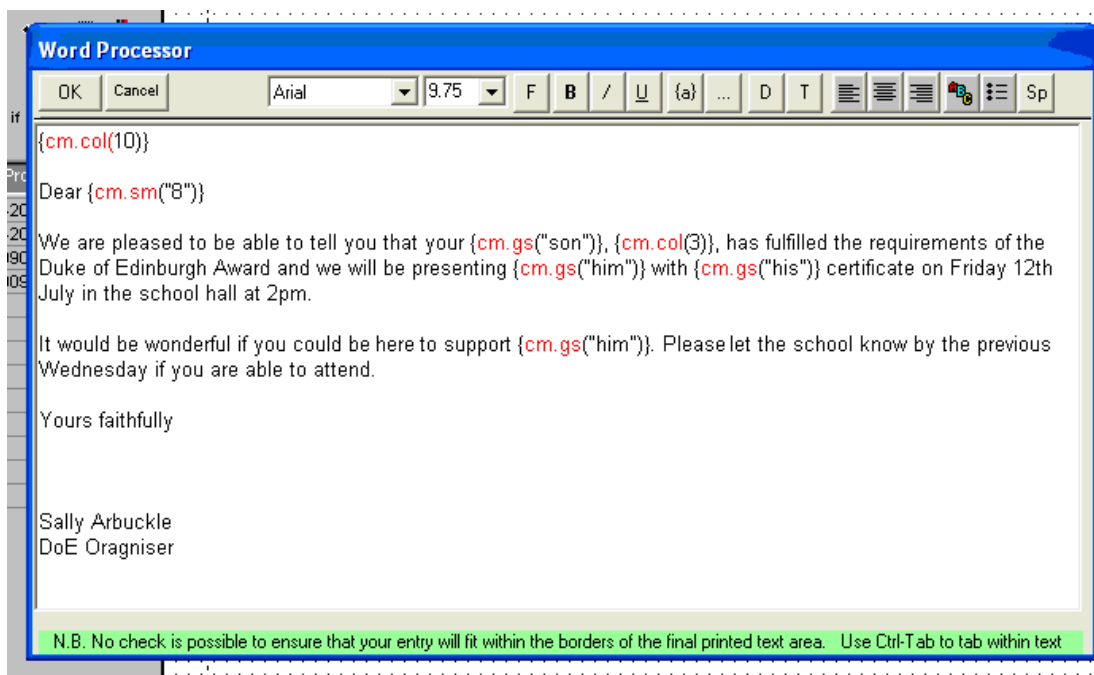


Figure 201: The composed letter

When returned to the document, the letter will appear as shown below.

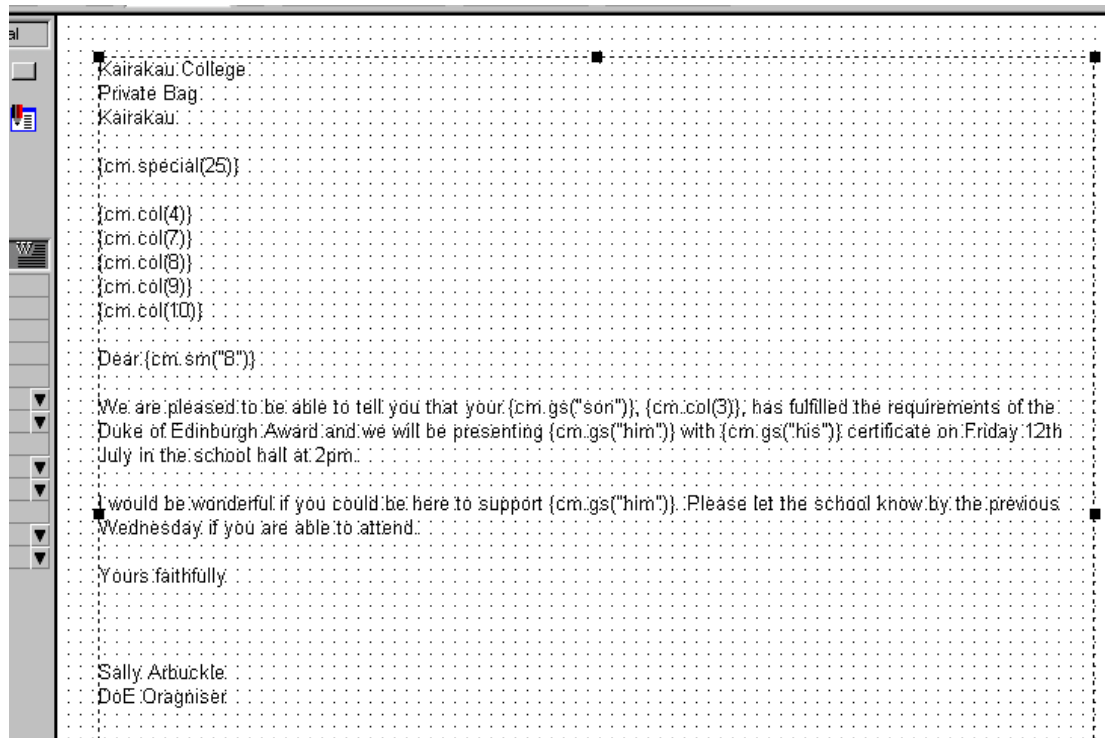


Figure 202: The letter in the edited document

When saved, and then viewed for a male student, the appearance will be as shown below.

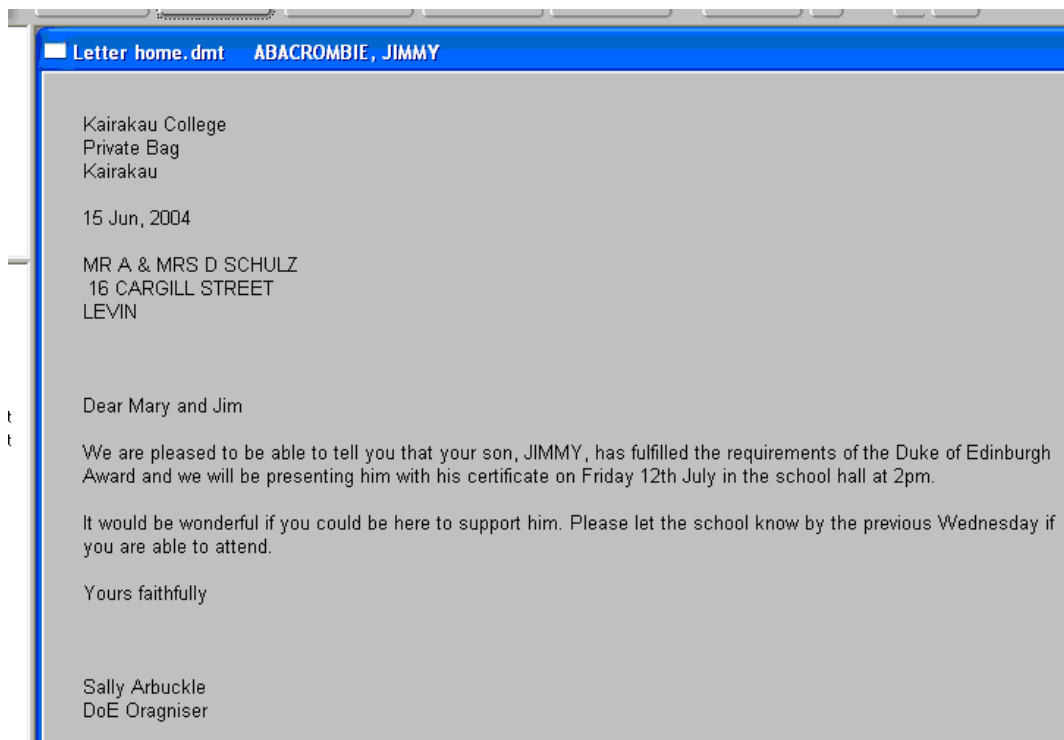


Figure 203: A male student's letter

And, for a female student :

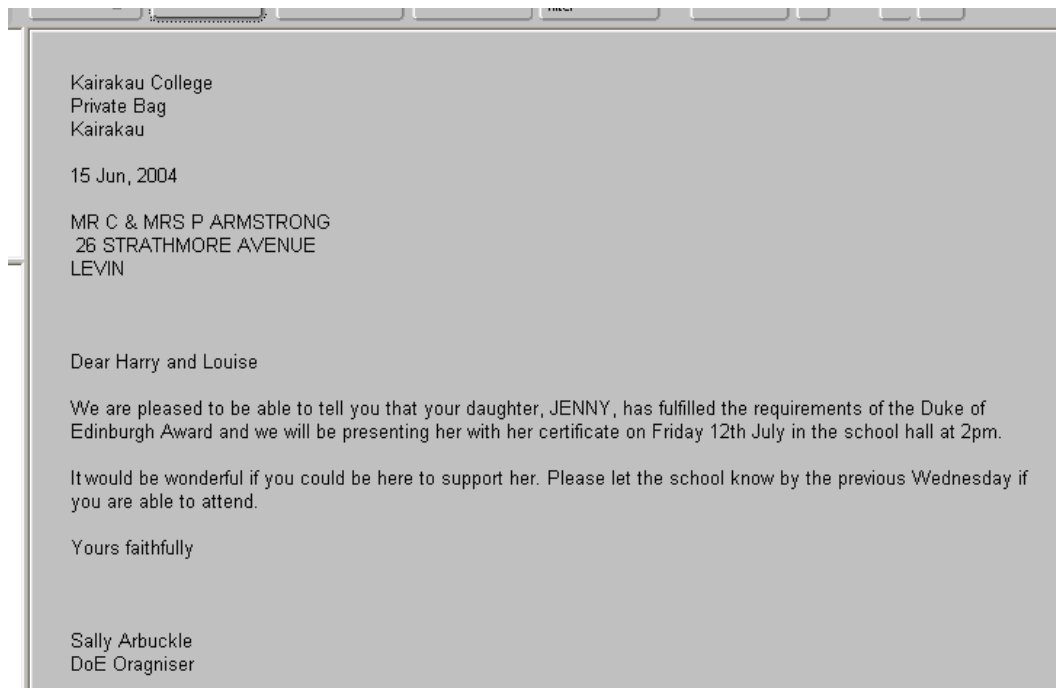


Figure 204: A female student's letter

When finally printed the appearance might be as shown below.

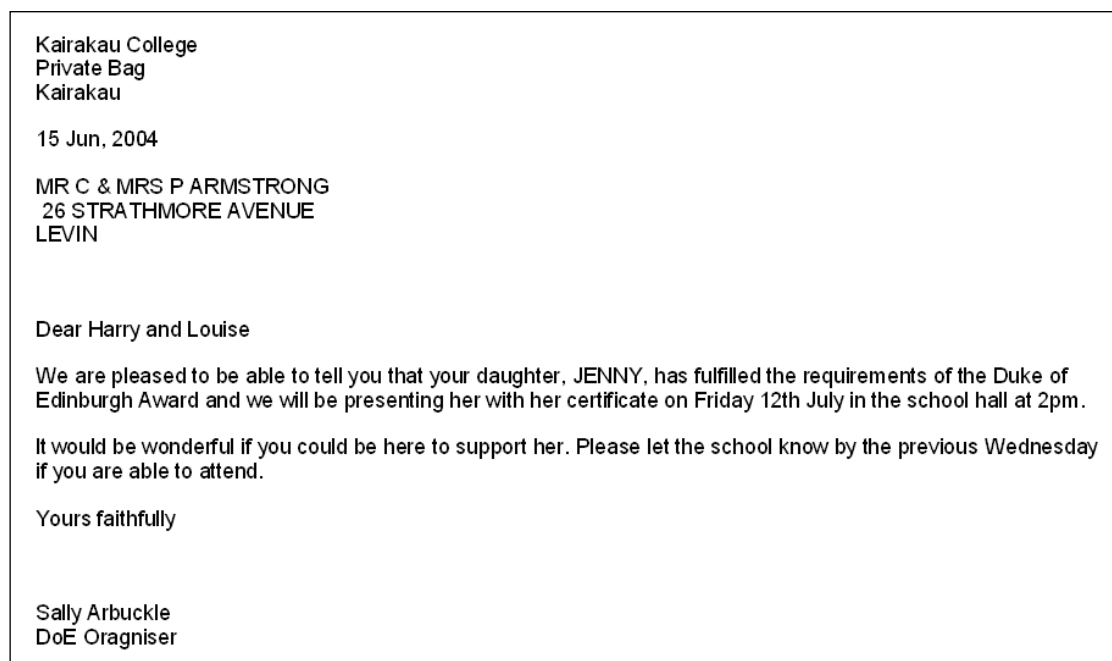


Figure 205: The printed result

You would include on the document the school logo and proper letterhead. The example above shows generating a letter.

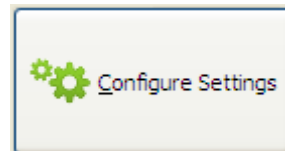
## 13 Printing Documents

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See Classroom Manager user guide for Printing Documents details.

## 14 Configuration

The configuration area of Student Manager is where you specify all of those aspects of the package which are unique to your school.



The Configuration buttons provides access to a number of processes associated with setting the package up for your school. These are accessed via a screen full of buttons shown below. You will quickly learn which buttons are used frequently and some you will perhaps never visit! The main screen for configuration is shown below.

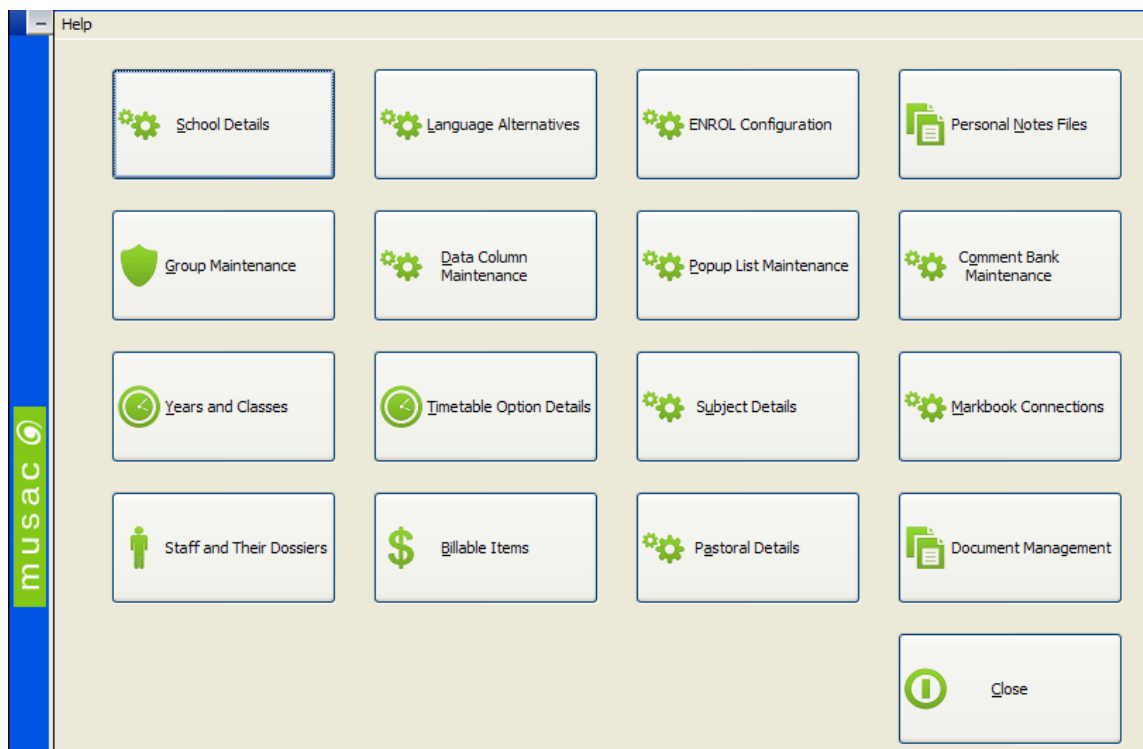


Figure 206: The configuration menu screen

### 14.1 School details

This configuration area allows you to specify two sets of information.

#### *School address details*

There is no 'Save' button as changes are saved as you make them.

The screenshot shows a web interface for 'Student Manager School Details'. The main heading is 'School address details' with a note: '(Note: Changes are saved as they are made)'. On the left, there are two buttons: 'School Address Details' and 'User Specified Details'. The form contains the following fields:

School name	Middle Earth School
School address	Address 1
	Auckland
	New Zealand
Post code	1234
School phone	64 9 345 6789
School fax	64 9 345 6780
School email	xxxxx.admin@xtra.co.nz
School web address	http://www.xxxxxxxxxx.school.nz
School email service provider *	
School number	0187

'School email service provider' is the digital address of the school's provider e.g. 'smtp.xtra.net.nz'

Figure 207: The school address details

Complete your school's email address, and your service provider, so teachers can email their student information home. This is done through Classroom Manager, which uses this same data. If you have Classroom Manager these will be complete.

Your email service provider's address may be for example, smtp.clear.net.nz or smtp.xtra.net.nz etc, ask your IT specialist.

### User-specified items

#### Enrolment number details

This can be up to six characters long. Some schools use the format shown and are currently on eg. 03/125, so their increment template would be ...XXX indicating that, as the next student arrives, increment the last three digits of the number. You may or may not wish to auto-increment the enrolment number. If you do, then each time you enter a student's enrolment number, that will become the basis of the following student's automatic entry.

Figure 208: The user-specified details

### Word Processor details

The Student Manager word processor is where you can set the default font information. You can always override this at the time, but these settings are what will be there each time you enter it.

Network delay - The above screen details this. Most schools have wisely upgraded their networks and treated them as valuable investments in the smooth functioning of their school.

### School category

Setting this causes some functions to be hidden. Some things are unique to secondary schools and are not required to be displayed in primary schools. Intermediate schools often require the features of both, and composite schools certainly do.

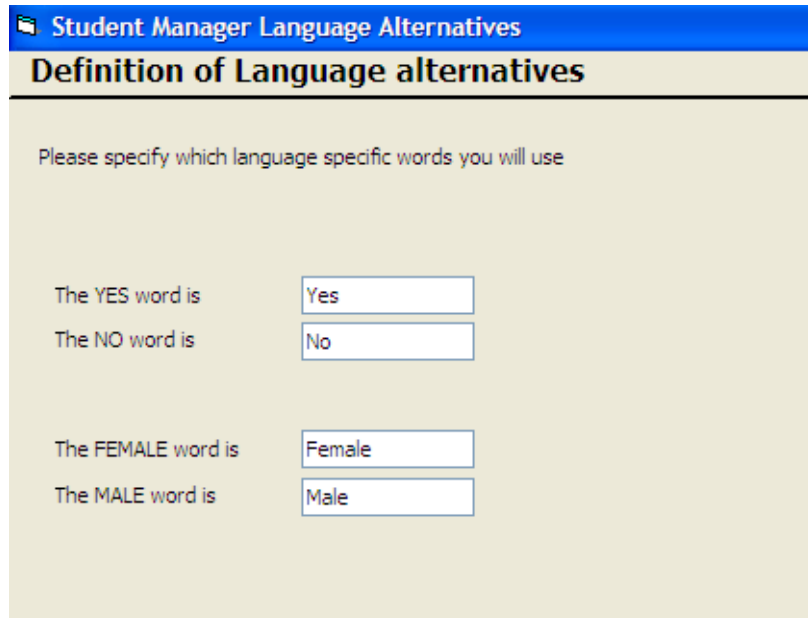
### Report dates

In designing documents (student screens) it is possible to display a date, and embed a formula which will reproduce the selected one of these four entries. For example, you might wish to date all of your student reports as 14 July. Should you later alter that entry here, then all of those reports are automatically updated.



## 14.2 Language alternatives

Click on the 'Language Alternatives' button.



The screenshot shows a web interface titled "Student Manager Language Alternatives" with a sub-header "Definition of Language alternatives". Below the header, there is a prompt: "Please specify which language specific words you will use". There are four input fields, each with a label and a text box:

The YES word is	<input type="text" value="Yes"/>
The NO word is	<input type="text" value="No"/>
The FEMALE word is	<input type="text" value="Female"/>
The MALE word is	<input type="text" value="Male"/>

Figure 209: The language alternatives

We have attempted to enable you to use different words for the four possibilities above. Some primaries have preferred 'Boy' and 'Girl' to 'Male' and 'Female'.

## 14.3 Group maintenance

Users of Student Manager can be members of groups. Each group has associated rights. Each user's rights are the combination of the rights of the various groups to which you belong.

Click on 'Group Maintenance' from the Configuration menu for the group maintenance screen shown below.

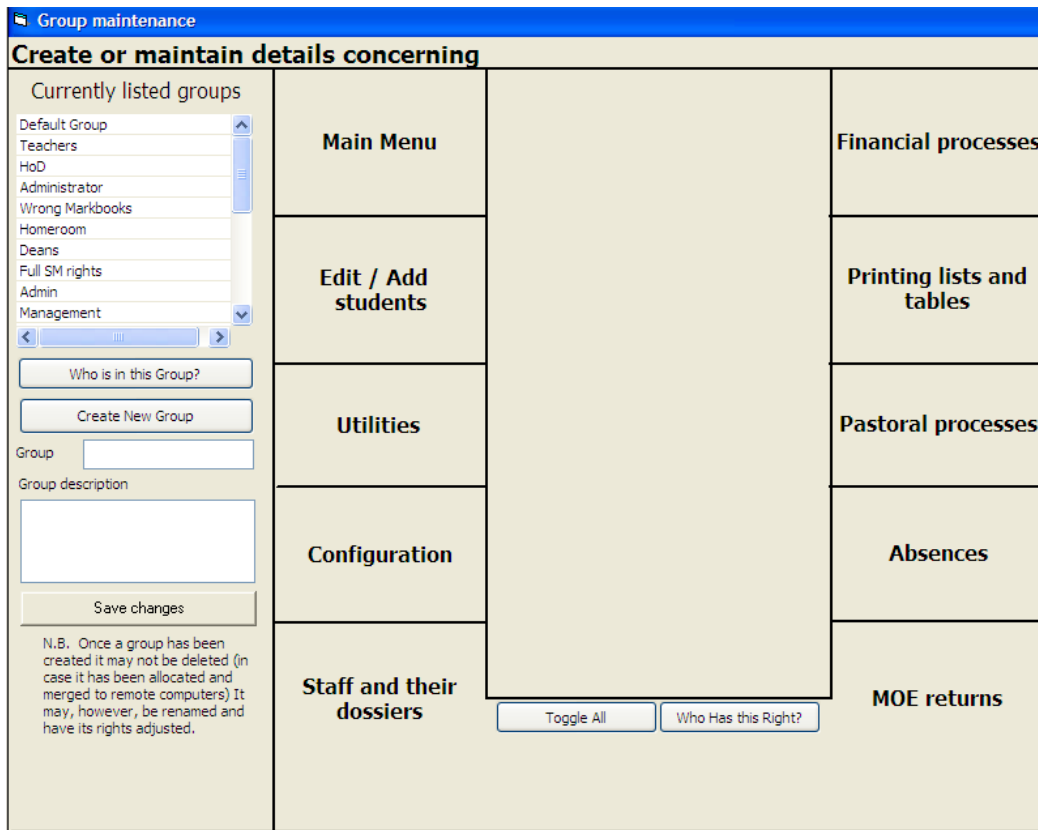


Figure 210: The Group maintenance screen

In the left top corner is a list of the existing groups. You can create a new group by using the relevant button, giving the group a name and description and then specifying the various rights, finally saving your changes.

The new name and description will be redisplayed.

On the right side of the screen is a display which lists the various categories of rights. In the illustration below, the 'Edit / add student' area has been selected and the rights associated with this group are displayed. You can see all of the possible rights have been allocated, probably having clicked the 'Toggle all' button at the bottom of the display.

	Edit / Add students	
<b>Main Menu</b>	Add new students	
	Access the data cube	
	View only access to financial details document	
	View only access to students' options document	
	View only access to pastoral details document	
	View only access to sensitive information document	
	View only access to caregiver details document	
<b>Edit / Add students</b>	View only access to Ministry details document	
	View only access to medical details document	
	View only access to attendance details document	
	Full access to financial details document	
	Full access to students' options document	
	Full access to pastoral details document	
	Full access to sensitive information document	
<b>Utilities</b>	Full access to caregiver details document	
	Full access to Ministry details document	
	Full access to medical details document	
	Full access to attendance details document	
	Deletion of financial transactions	
<b>Configuration</b>	View only access to personal details document	
	Full access to personal details document	
	Creation of document directories	
	Temporarily access all documents	
	Document selection via student screen	
	View only family details	
<b>Staff and their dossiers</b>	Able to edit/create documents	
	Access to Classroom Manager columns	

Figure 211: Setting individual rights for a group

You can click in the right column to allocate or remove particular rights from the display.

If you select a particular right, then click on the 'Who has this right?' button then those members of your staff who do have the selected right will be displayed.

details concerning	
	Who can : Full access to financial details document
<b>Main Menu</b>	ALLWOOD, B...
	AW...
	CHE...
	CO...
	Cun...
	DAN...
	DEC...
<b>Edit / Add students</b>	DOF...
	DOI...
	DOY...
	EKI...
	ETK...
	FOZ...
	GEE...
<b>Utilities</b>	GRO...
	HAF...
	HOT...
	HUF...
	INK...
	JEH...
	KER...
<b>Configuration</b>	KUD...
	LAS...
	LUV...
	Mck...
	McL...
	MIC...
	MIR...
<b>Staff and their</b>	MUL...
	PAR...
	PUK...
	RHI...
	ROL...
SOM...	
SUN...	

Figure 212: The holders of a particular right

Click the 'OK' button when you have finished and you will be returned to the previous screen. Under 'Teachers and Dossiers' the process of allocating group memberships to teachers and other users of the software is detailed.

## 14.4 Data column maintenance

The storage of student data in the database is based on columns. (Remember that the database may be conceived of as a spreadsheet). This process allows you to create and/or edit columns - not the data contained therein - but the column titles and types themselves.

From the Configuration menu click 'Data Column Maintenance'.

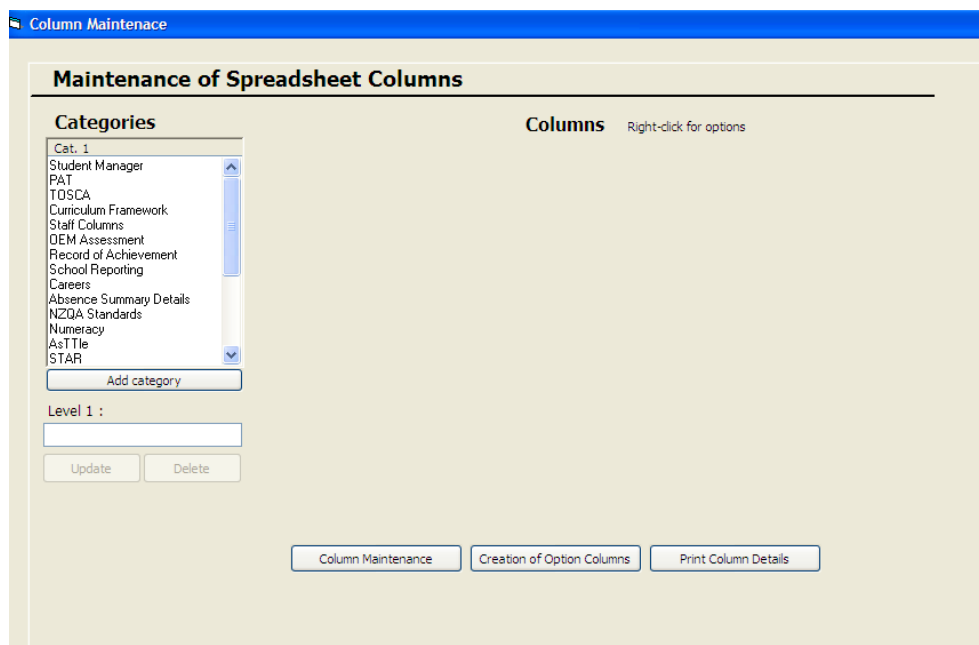


Figure 213: The column maintenance screen

The main column maintenance screen is shown above. At the left of the screen are the Level 1 categories. Student Manager columns all appear under the 'Student details' category.

### *What are categories?*

When in use, Classroom Manager and Student Manager may make use of thousands of columns. To keep track of all of these, they are subdivided into categories which are subdivided into categories too, and in turn perhaps subdivided into categories, if necessary, up to five layers deep.

Track a PAT column. Click on PAT and the Level 2 categories for these appear, as shown below, in an overlaid window.

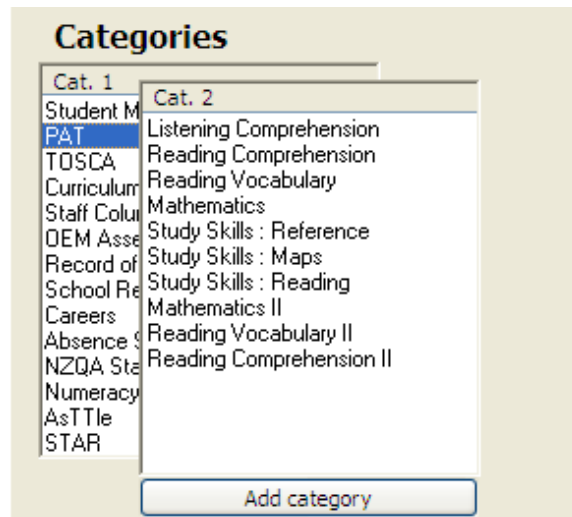


Figure 214: Category 2 - The PAT topics

Click on Mathematics, and its Level 3 categories are displayed. Click on Year 8 and - there are no further sub-categories - we've reached the point at which columns are defined. The display below shows the various columns which relate to PAT > Mathematics > Year 8.

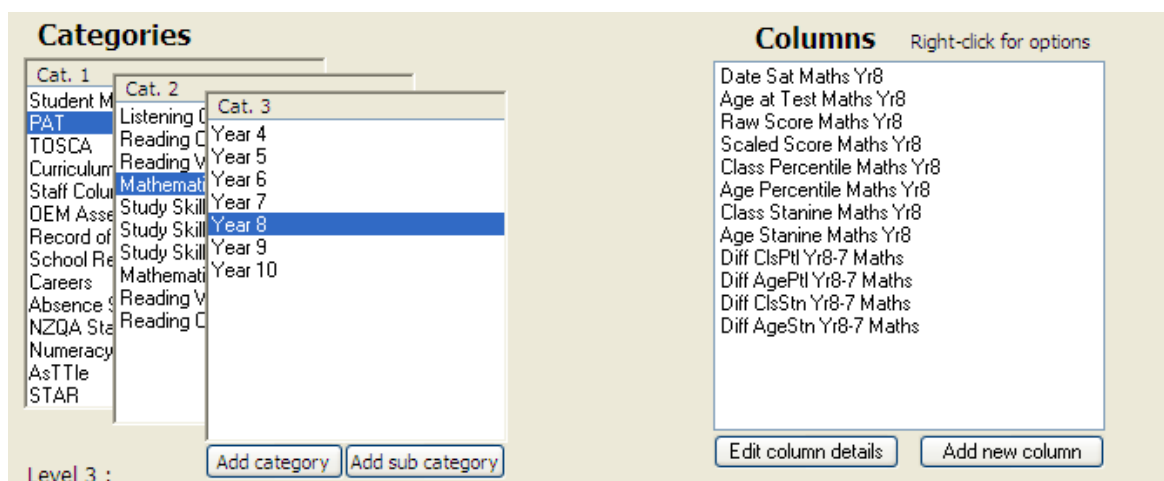


Figure 215: Category 3 – The years – and the columns

Select a column and then right-click on it. A popup menu appears. You may use this to copy bunches of columns which already exist to then move to another category where the columns have yet to be created, and right-clicking to paste the copied columns. The new ones will automatically be connected correctly to their categories.

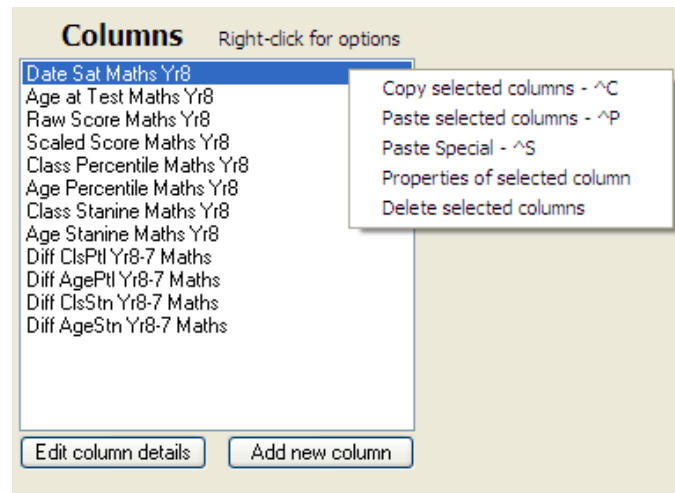


Figure 216: Copying columns

To create some columns relating to, for example, a rugby team; it is not wise to create a level 1 category called 'Rugby' - 'Sport' is better.

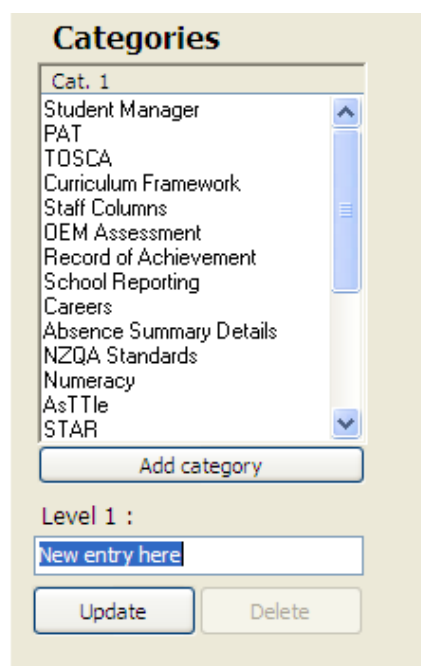


Figure 217: Creating a Level 1 category

To create the new Level 1 category, click 'Add category', Type 'Sports' in the space provided and click 'Update'.

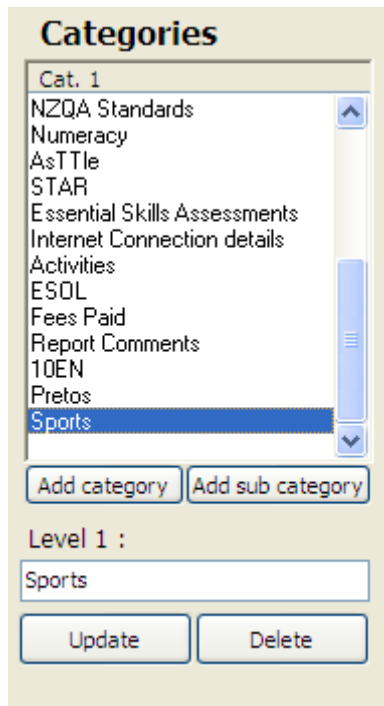


Figure 218: The new category is added

A new entry 'Sports' will appear at the bottom of the list. Select this, followed by the 'Add sub category' button, and type 'Rugby' into the space provided, followed by the 'Update' button.

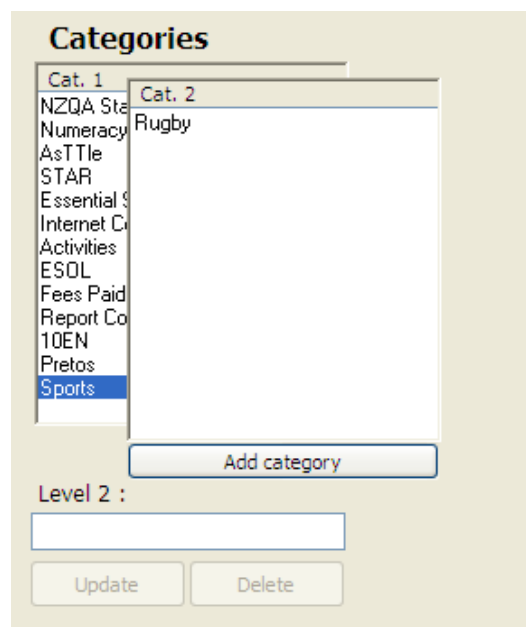


Figure 219: The Category 2 entry

The new sub-category, 'Rugby' will appear as shown above. You can add several more sub-categories under 'Sport' such as 'Netball', 'Tennis' etc, also visit 'Rugby' and create some teams in category level 3 (click on 'Add sub category').

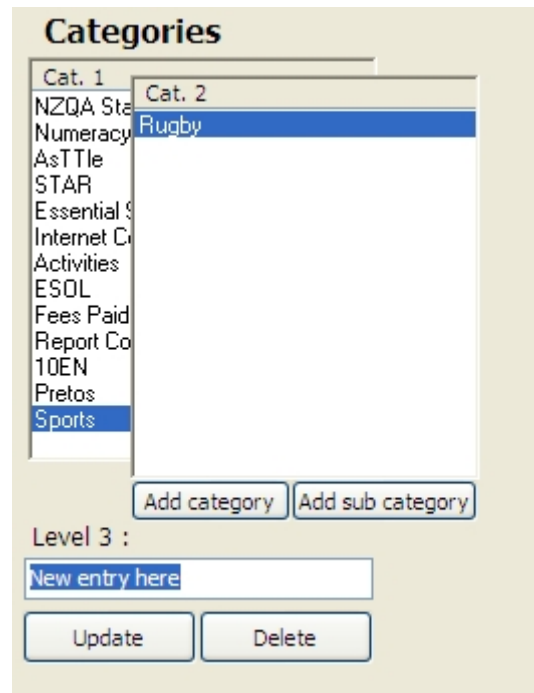


Figure 220: The new category in place with sub-category

To add a column under our level 2 category - Rugby, click on the 'Edit column details' button at the right of the screen. When the following popup window appears click the box at the bottom and then 'Close'.

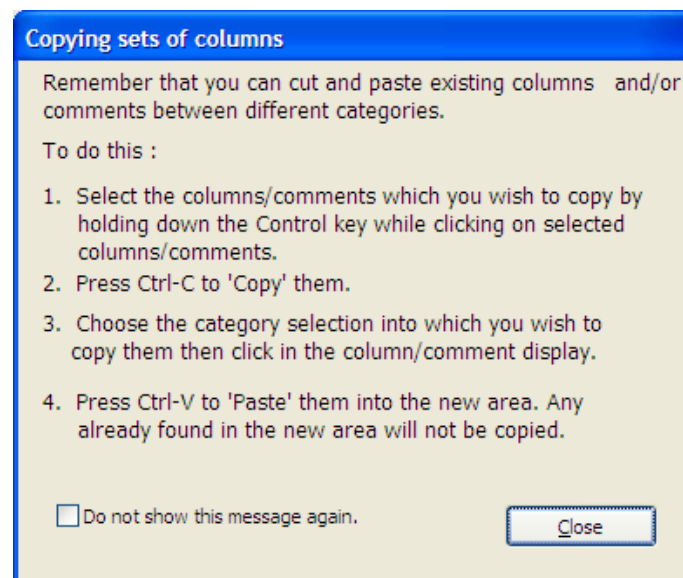


Figure 221: A note re the copying of columns

That will take us to the column specification screen. In the example below, I've added a column title : Points scored, selecting 'Numbers' as the type of column.



Figure 222: The creation of a column

There are several types of columns. This allows for increased efficiency in the storage of data in the database. Some are very simple, and others are quite complex:

- Numbers - are for purely numeric data, including decimals.
- Simple text - is text - up to many many many characters. Its in the billions, but its enough for anyone's family name!
- Date - to store birthdates etc
- Rich Text Format (AKA RTF - i.e. known in the profession as RTF) holds text where fonts and sizes and colours etc are embedded. This is actually also stored in the 'simple text' area of the database, but we distinguish between the two at this point.
- Popup list - such as 'Gender' (choice of two), 'Yes / No' - ditto, School of Origin - about 3000 entries... These are definable by the user (you...) via the 'Popup Maintenance' button - two along from this one (Data column maintenance)
- <11 characters - is a special type for small text entries eg. 2a, 3b,A, B, etc
- Curriculum Framework (used by Classroom Manager)
- Currency - for money -eg. fees.

There are more column data types but they all relate to Classroom Manager.

Figure 223: The extra details of the new column

A longer column description (which can later be displayed on documents) is given.

The button entitled 'Column Rules' allows you to specify a range of 'legal' entries to which the data entry person is restricted. See the illustration below, where specific column entries are limited to: a, b, c, d and e.

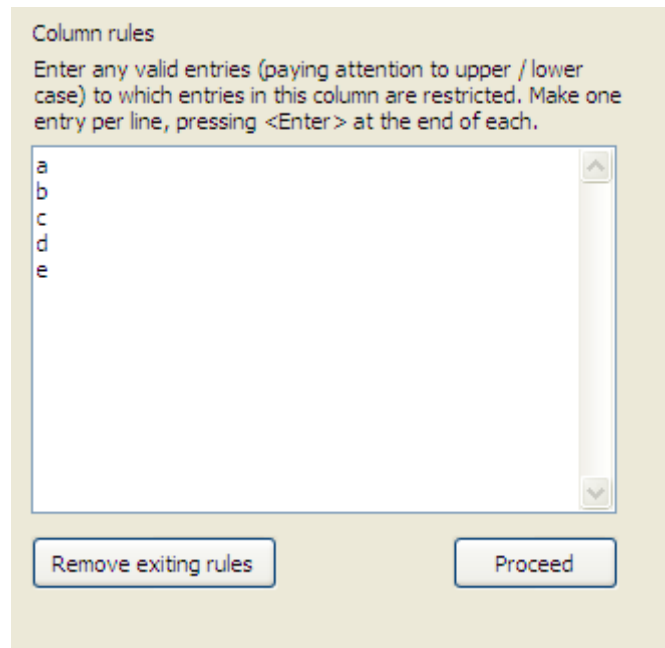


Figure 224: The column 'rules'

Click on the 'Proceed' button to return to the main screen, with the new column displayed. Similarly, you can add your own other 'Rugby' columns. If you were going to add one for 'Position' then you may visit the 'Popup Maintenance' area first to specify a group of popup data entries under this heading, to which you could then link via the column type : popup.

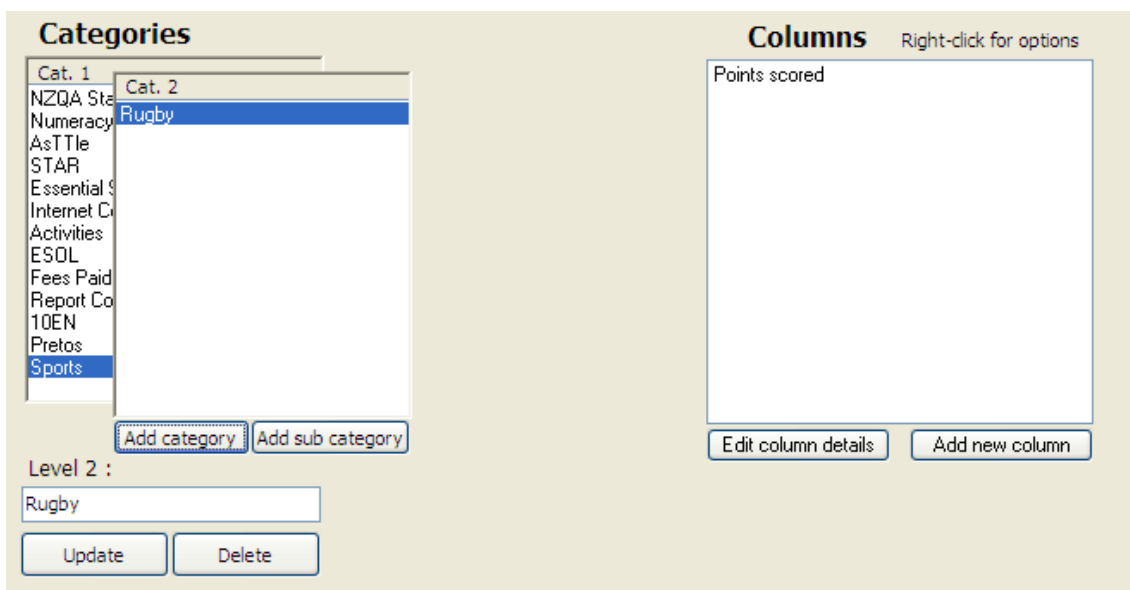


Figure 225: The new column in place

There are also 'Column Maintenance', 'Creation of Option Columns' and 'Print Column Details' buttons on the screen to create sets of columns for students' options, detailed under 'Options'. The screen is shown below.

**Creation of option/subject columns**

Options are stored in columns which appear under :

Category 1 : Record of Achievement  
Category 2 : Subject history  
Category 3 : Year

Columns are allocated in sets of twentyfive. You may request up to thirtyseven sets each year so that students may take several groups of options during the year.

Total no. of sets : 5 Change to :

Year :

Year category : 2008 FOUND

NOT ALL sets of option columns HAVE YET BEEN CREATED for 2008  
Core set of columns for 2008 have been created.

Figure 226: The option column set creation screen

Finally, the Print Column Details button prints out your columns and their categories to varying levels of detail.

The number of columns under each category are shown. Remember, most of these relate to Classroom Manager. Unless you have been active in this area, Student Manager is restricted to the first category.

**Column Maintenance**

### Printing the columns

Select those level 1 categories for which you wish to print columns.

Category	Columns
Student Manager	572
PAT	719
TOSCA	54
Curriculum Framework	2024
Staff Columns	340
OEM Assessment	10
Record of Achievement	1271
School Reporting	0
Careers	46
Absence Summary Details	1802
NZQA Standards	56
Numeracy	96
AsTTle	4536
STAR	195
Essential Skills Assessments	72
Internet Connection details	3

Total columns specified : 12090

Include MUSAC column numbers

Include category numbers

Include column types

Begin each Category 1 group on a new page

Print column title  Landscape

Print column short description (when available)  Portrait

Print column long description (when available)

Print

Column Maintenance    Creation of Option Columns    Print Column Details

Figure 227: The column details and printing options

## 14.5 Popup maintenance

Popup lists are a central part of data entry and are great options for entering particular data.

**Please note the red box at the top of the screen:** Some popups, eg. Ethnicities, Maori Language Learning Index, etc are specified by the Ministry of Education and you may not edit these. They are therefore not even displayed in this list, shown at the left of the main screen below.

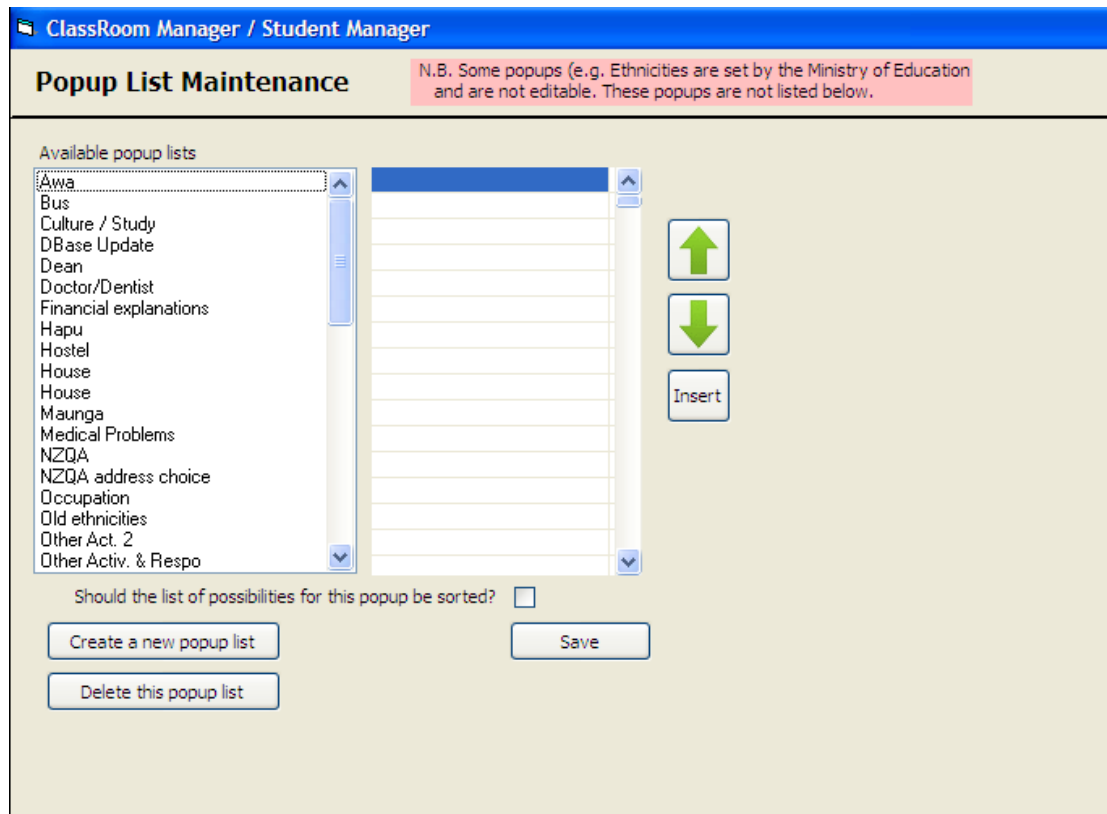


Illustration 20 : The popup maintenance screen

Selecting a previously designed popup - House - the four houses (from Linwood High School) are shown. Naturally, Ngarimu is on top!

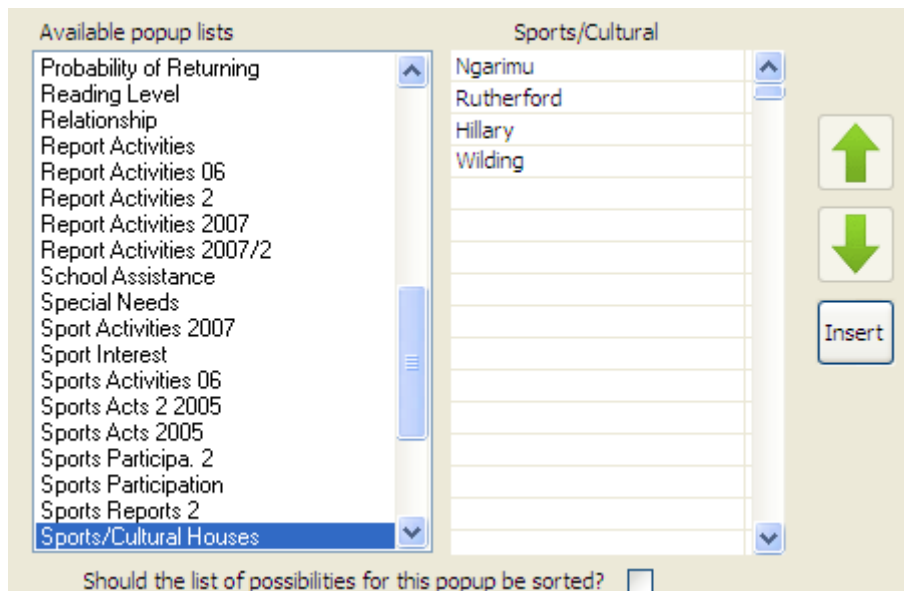


Illustration 21 : A popup and its contents

Rutherford is selected and use of the 'Down' button adjusts him to the bottom of the list.

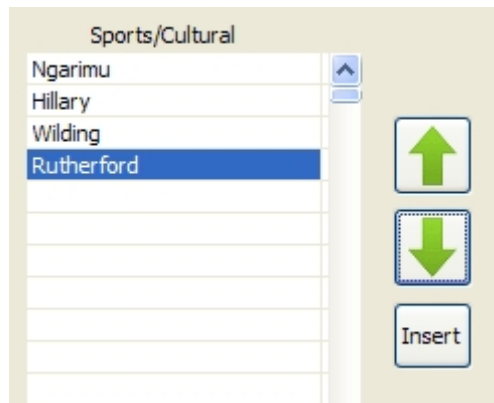


Illustration 22 : An entry is moved

To create a new popup of playing positions on a rugby field, return to column maintenance to define a new 'Position' column. When I click on 'Create a new popup', the following small window appears.

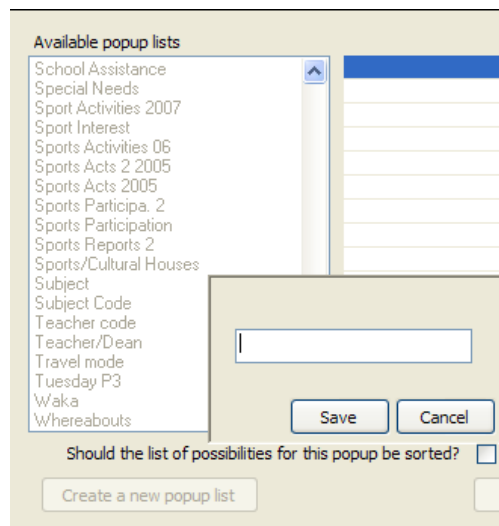


Illustration 23 : Creating a new popup

Into the window I typed 'Position' and clicked 'Save'

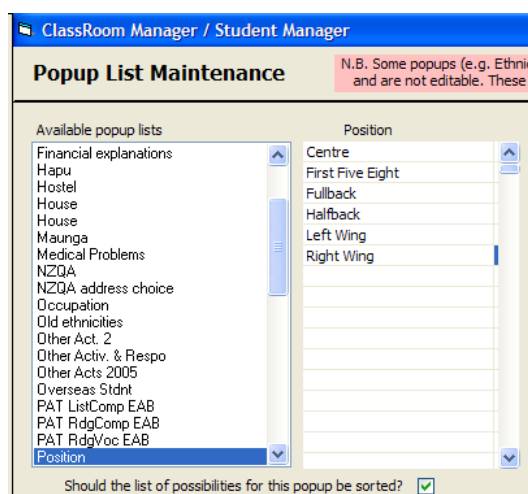


Illustration 24 : The entries are in place

'Position' has been added to the list of popups, so some of the entries are typed into the right hand side list – in a different order, but I then ticked the little box at the bottom of the screen and 'Save'd them - which put them into alphabetical order. To make changes I can untick the box and manually (using the Up and Down buttons) move each back into preferred positions.

## 14.6 Comment bank maintenance

Comment banks are used in school reports and, while used primarily by Classroom Manager users, the facility to configure them has been included here. Click 'Comment Bank Maintenance' from the Configure Settings menu. The main screen is shown below.

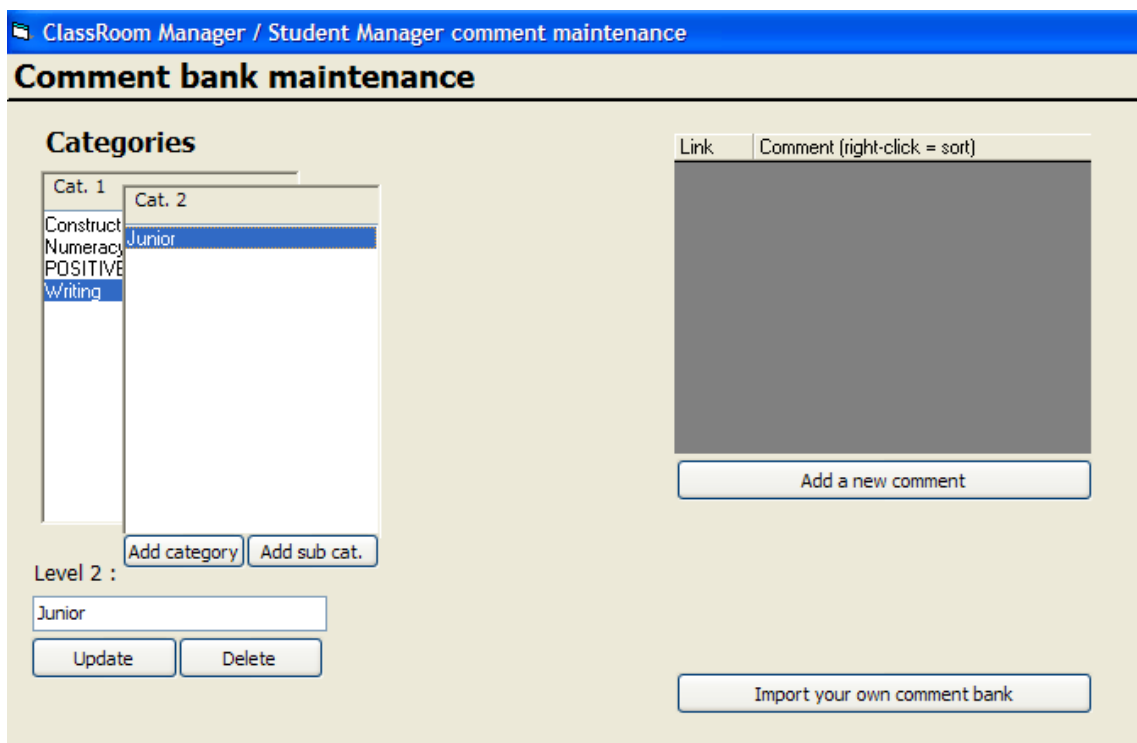


Illustration 25 : The comment bank maintenance screen

This screen is very similar to the screen used to set up columns, and the process is virtually identical. Again categories need to be set up, as covered above. For configuring the comments themselves; click on 'Add a new comment', or click on an existing comment, and the word processor, shown below, will appear.

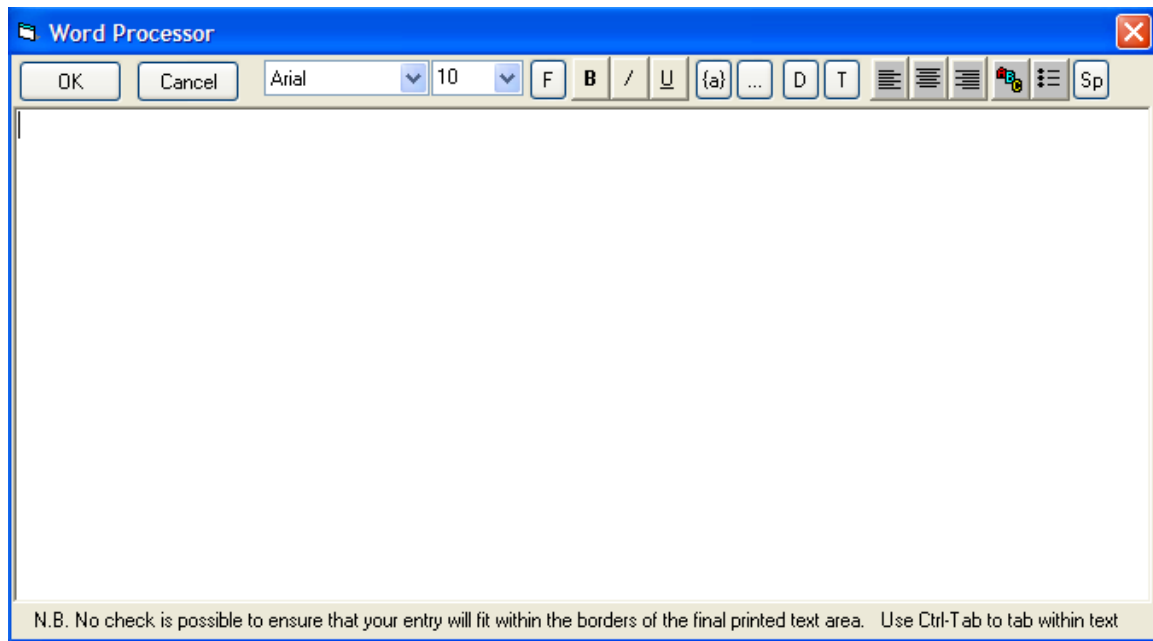


Illustration 26 : The word processor is used to define comments

Type in your comment, remembering that Ctrl-N can be used to insert the code for the student's preferred name. You can also use the {a} button to insert other codes such as the gender specific codes. An example is shown below, which includes a spelling error.

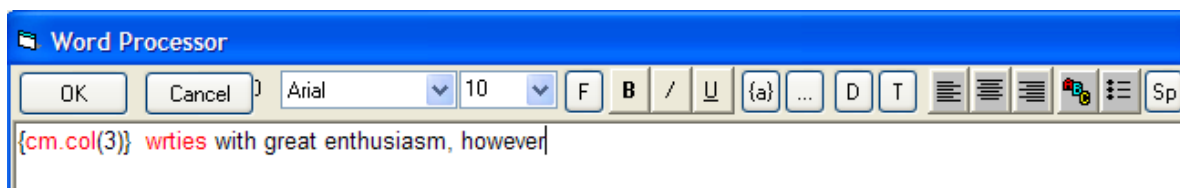


Illustration 27 : A small part of a comment (with spelling mistake)

If you have the Spell Checking turned on (this can be done via the 'Sp' button at the right hand end of the word processor buttons) ....

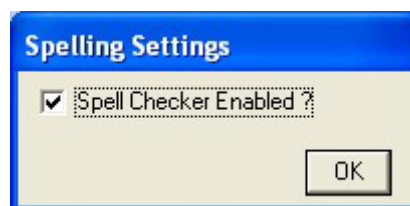


Illustration 28 : The spell checker is enabled

... then, when you right-click on the faulty word, the spelling assistant will appear, as shown below.



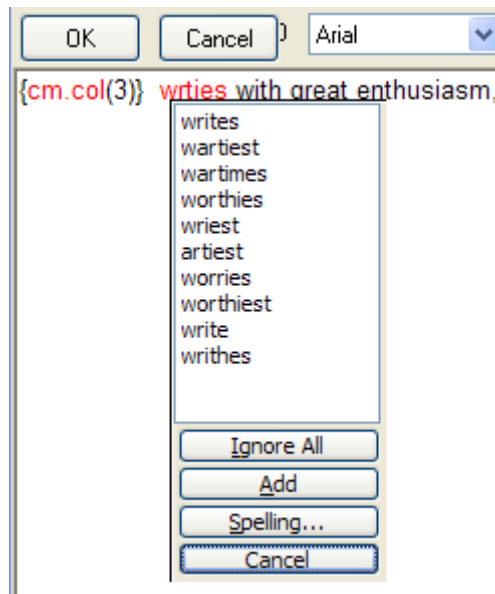


Illustration 29: Correcting a spelling mistake

The use of the {a} button to insert codes will be covered in full in Appendix 5, but a view of the tabs are reviewed here. The main insertion screen is shown below.

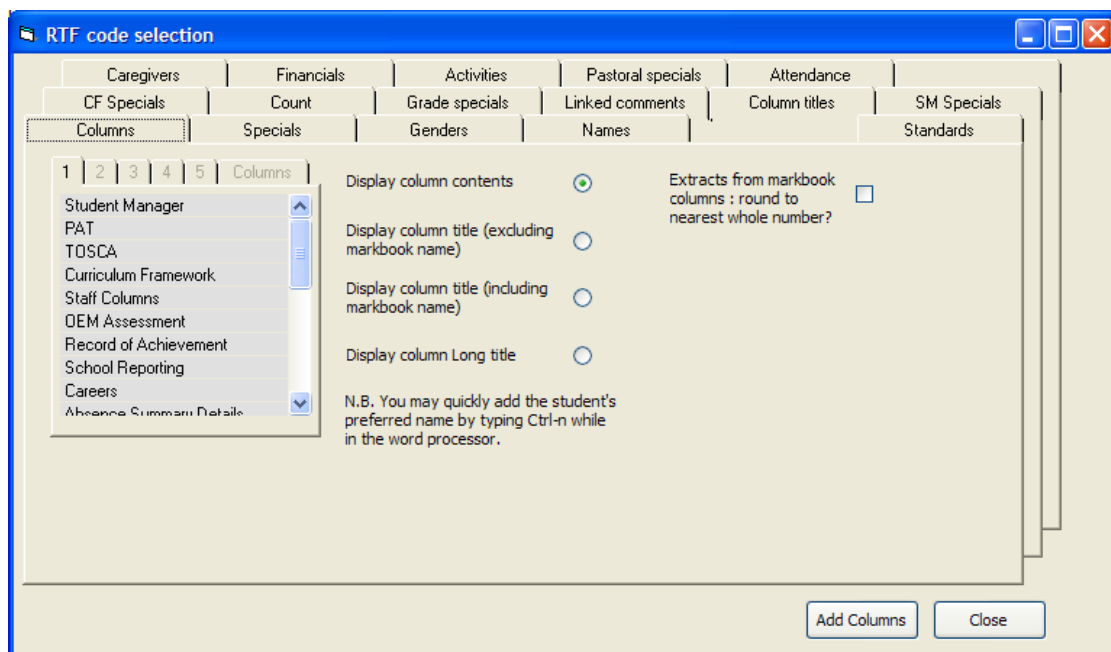


Illustration 30 : The code insertion tool

The 'Gender' tab offers you the ability to insert codes which, once the gender of the student for whom you are printing is know, will be replaced by the relevant word. An example of the use of this was shown in the 'Letter home' regarding document design.

Columns	Specials	Genders
he	She	
he	She	
His	her	
His	her (use his)	
Him	her (use him)	
Boy	Girl	
Son	Daughter	
Son's	Daughter's	
Himself	Herself	

Illustration 31 : The gender codes

The example below shows a gender code which will be replaced by 'he' or 'she' on printing.

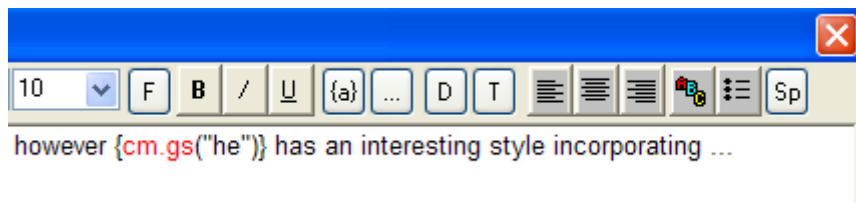


Illustration 32 : The completed comment

Once you have completed your comment, and clicked the 'OK' button on the word processor, your new comment will be added to the list on the comment maintenance screen. The example above is shown below....

Link	Comment (right-click = sort)
W001	{cm.col(3)} writes with great enthusiasm,

Illustration 33 : The new comment is listed

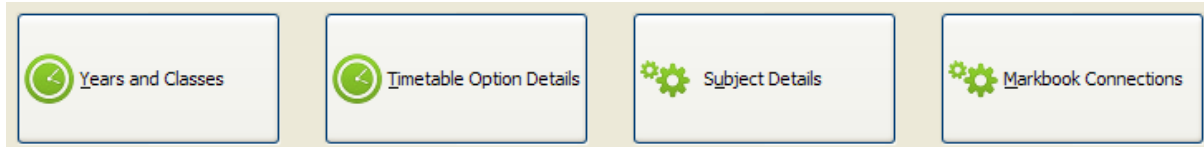
... and a short-cut code for the comment has been added to the left hand column.

Link	Comment (right-click = sort)
M001	{cm.col(3)} is very good at Maths.
M002	{cm.name("2")} is rather startling at Math
M003	Finally, here is a third comment concerni

Illustration 34 : Three comments in the bank

In this example, three comments have been added, each with a shortcut code. If you click in the column headings you can have the comments sorted on either code or comment.

The following group of four buttons are used to configure information relating to students' classes and subjects. These processes are also available via CMAAdministrator.



## 14.7 Years and classes

This allows you to set up three sets of annual details - your Years, your vertical groups' names and your horizontal groups' names. In a primary school these will probably be called years, classes and rooms respectively. In a secondary school they might be called Years, Forms and Tutor Groups. A horizontal class is one wherein all of the members are at the same year level. These are traditionally form classes. Vertical groups are those wherein the students may come from several different year levels - eg. rooms or tutor groups.

### Years

'Years and class names' screen:



Illustration 2 : The years and classes buttons

Click 'Year Titles' to access the years, as shown below.

**Active years**

Title

0	
1	
2	
3	
4	
5	
6	
7	
8	Year 8
9	Year 9
10	Year 10
11	Year 11
12	Year 12
13	Year 13
14	Year 14
15	Adults ov 20
16	
17	
18	
19	
20	

Illustration 3 : The years

This school is obviously running from Year 8 through to over Year 15 groups. The normal maximum is Year 13. If you click on the 'Display student numbers' button then the numbers of students in each year level will be displayed, as shown below

**Active years**

Title

8	Year 8	1
9	Year 9	154
10	Year 10	179
11	Year 11	202
12	Year 12	130
13	Year 13	228
14	Year 14	1
15	Adults ov 20	
20	Total	895

Illustration 4 : The numbers at each level

*Horizontal Groups*

In the secondary school example below these are called 'Forms' and in primary schools, 'Classes'. You can change this in the box provided.

**Horizontal groups**

Title

Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14
	9PA	10JO	11ED			14A
	9OS	10WA				
	9FA	10MA				
	9HA	10EL				

Illustration 5 : The vertical group names at each year level.

Again, there is a button which allows you to display student numbers, as shown :

Year 9	Number	Year
9PA	27	10JO
9OS	27	10WA
9FA	31	10MA
9HA	31	10EL
	116	

Illustration 6 : The number is each class or form

We do not recommend deleting a class name. Students do not have these names stored directly in their records; instead they have a number, managed by the software, which points to the relevant entry. If you delete an entry then their numbers would be 'floating pointlessly'....

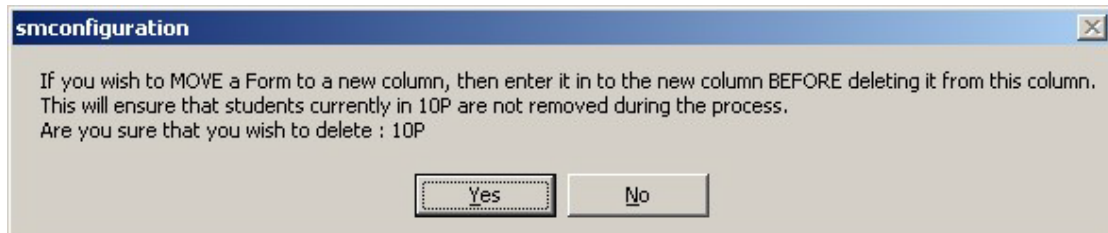


Illustration 7 : Moving a horizontal group.

As this message indicates, when you've removed a class name, if you are wishing to MOVE the class name to a new column, then you should make the new entry in the desired column FIRST, BEFORE deleting it from the column in which it is no longer required.

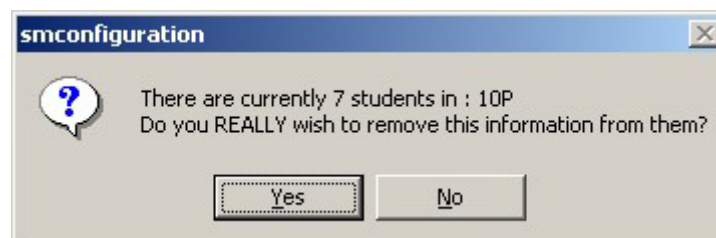
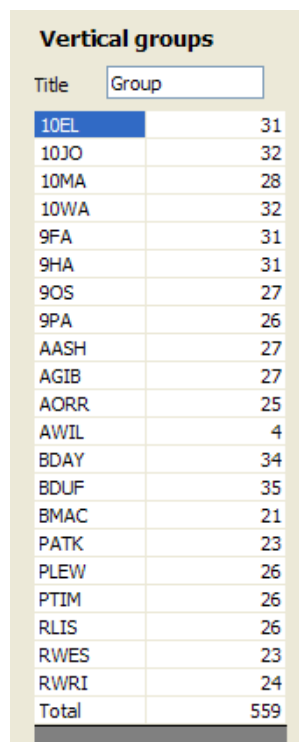


Illustration 8 : Confirmation of deletion

If you persist and click 'Yes' to remove it regardless, then a warning may appear if it is currently attached to students.

### Vertical Groups

Shown below as 'Group' the button to display the numbers of students in each group.



The screenshot shows a window titled "Vertical groups". At the top, there is a "Title" field containing the word "Group". Below this is a table with two columns: the first column lists group codes and the second column lists the number of students in each group. The "10EL" row is highlighted in blue. At the bottom of the table, a "Total" row shows a count of 559.

Group	Count
10EL	31
10JO	32
10MA	28
10WA	32
9FA	31
9HA	31
9OS	27
9PA	26
AASH	27
AGIB	27
AORR	25
AWIL	4
BDAY	34
BDUF	35
BMAC	21
PATK	23
PLEW	26
PTIM	26
RLIS	26
RWES	23
RWRI	24
Total	559

Illustration 9 : The school's vertical groupings – and their numbers

Finally, above refers to the current year. You may also set up your names for the 'Next year' and attach these to students in advance of time - allowing you to print intended class lists before the end-of-year rollover - which transfers the data to its new destination columns.

At the top left corner of the screen is a button you can click to toggle between this year and next year.



Illustration 10 : Changing years

## 14.8 Timetable options

From the Configure Settings menu, click the 'Timetable Option Details' button. This is where secondary schools (and some intermediates and primaries, who use core classes to generate electronic markbooks for the purposes of Classroom Manager) set up their sets of option lines. This section is also dealt with in the Classroom Manager manual which deals with the same topic.

Options – structures and students' columns.

Should primary and intermediate schools read this? It is not uncommon for these schools, once they see the usefulness of electronic markbooks to wish to have the same facility. If this is the case then read on.....

In a secondary school students take some subjects where they remain in their form class groups. These are normally the 'compulsory' subjects, such as 'English, Mathematics, Science, Social Studies, Art, Music, Physical Education and others at year 9 and year 10. These are known as **'Core'** subjects. These can vary from school to school.

Students also take subjects which they choose from a list of available possibilities, such as History, Information Technology, Home Economics, Biology. These are known as **'Option'** subjects.

In some schools the boundaries are blurred. Some ensure that ALL junior students take a wide range of 'compulsory' subjects in their form class groups while others split into different groupings (via streaming) for subjects such as English and Mathematics.

There are some 'golden rules' for the successful management of students' subjects in Classroom Manager and Student Manager.

If ALL students remain in their form class for a particular subject and remain in that group throughout the school year then it is safe to treat this subject as a 'Core' subject.

However if even one student is separated off into other than their form class for a particular subject, it is safest to consider this as an 'Option' for ALL students at that level.

Many schools have their students in one selection of subjects for part of the year and allow students to change to a different selection at another time. Some schools allow for this sort of change several times each year.

When students select their subjects from lists of possibilities, on subject from each list, then these lists are known as 'option lines' and a particular set of lists which operates at a particular time is known as a **'set of option lines'** or a **'set of options'**

Some schools operate more than one set of options in a year, sometimes changing at mid-year and sometimes changing each term. Generally, the 'Core' subjects remain fixed throughout these option changes.

Students take 'Core' subjects and they also take 'Option' subjects. At the senior levels it is not uncommon for every subject which a student takes to be selected from option lines. These students take no 'Core' subjects. (They may take compulsory subjects (such as English) but they do so by choosing from option lines.)

### Option columns

The creation of suitable set(s) of columns to hold students' choices is dealt with later in this section.

In Classroom Manager the core classes taken at each level are treated as an extra set of options, in that a set of columns must be created for them and the students core subjects imported into these columns.

The plural 'sets' has been used frequently above. It is, however, the norm for a secondary school to have ONE set of options which lasts all year. Students' choices in this option set are imported in to a single set of option columns.

Option columns are a little different to ordinary columns in the amount of information which can be stored in them. They can actually hold up to two hundred results and eight report comments for each student.

Only one set of options can, at any one time, be the **CURRENT** set. More than one set, however, can be currently **active**. Half way through a year in which you plan to use four sets of options you may have two sets which have been activated and, probably, the second set will also be the current set.

The main screen is shown below.

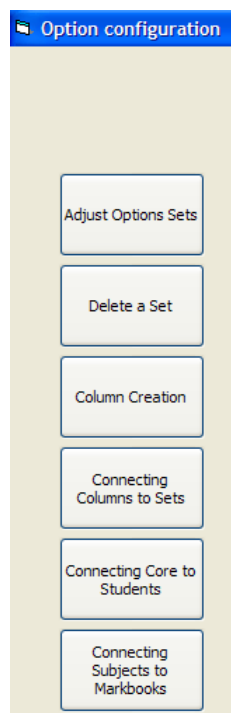


Illustration 11 : The option configuration buttons

On the way in you may receive the following warning :



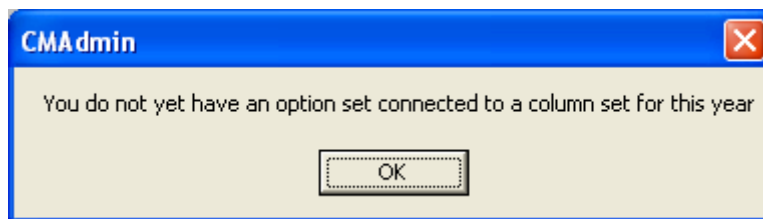


Illustration 12 : Upon entering Option configuration

This indicates that you have not yet completed your work in this area, and need to take the following steps to prepare for the new year.

To create one or more sets of columns to hold the student's subjects, click on the third button on the left. This brings us to the column creation screen, shown below.

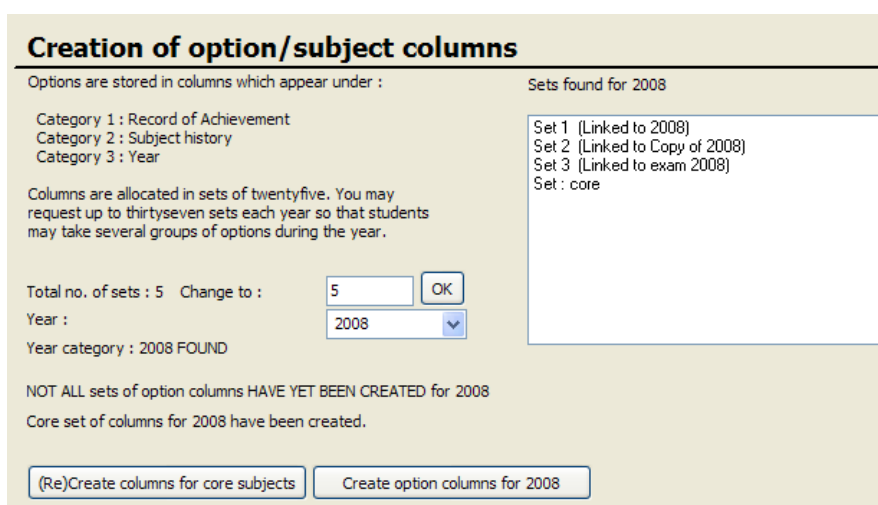


Illustration 13 : The column set creation screen

Ensure that the number of sets requested is correct. This is done in the centre of the screen, as shown below.

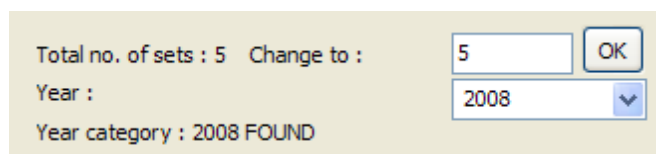


Illustration 14 : Entering the required number of sets

Once done, click on the buttons and the sets will be created, as shown below.

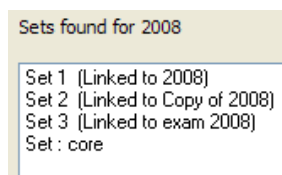


Illustration 15 : The sets have been created

Now that we have our columns, which we shall need later, we can move to the sets of option lines from which students make their subject choices.

### Maintaining option structure(s)

Most schools use MUSAC's Timetable Assistant to design their timetable and our program exports the finalised design(s) directly into the Student Manager database, the same one as that used by Classroom Manager.

So, if you've already done all that then skip this step.

### Adjust option sets

From the Configure Settings menu > Timetable Option details, click on 'Adjust option sets', and the following screen will be displayed.

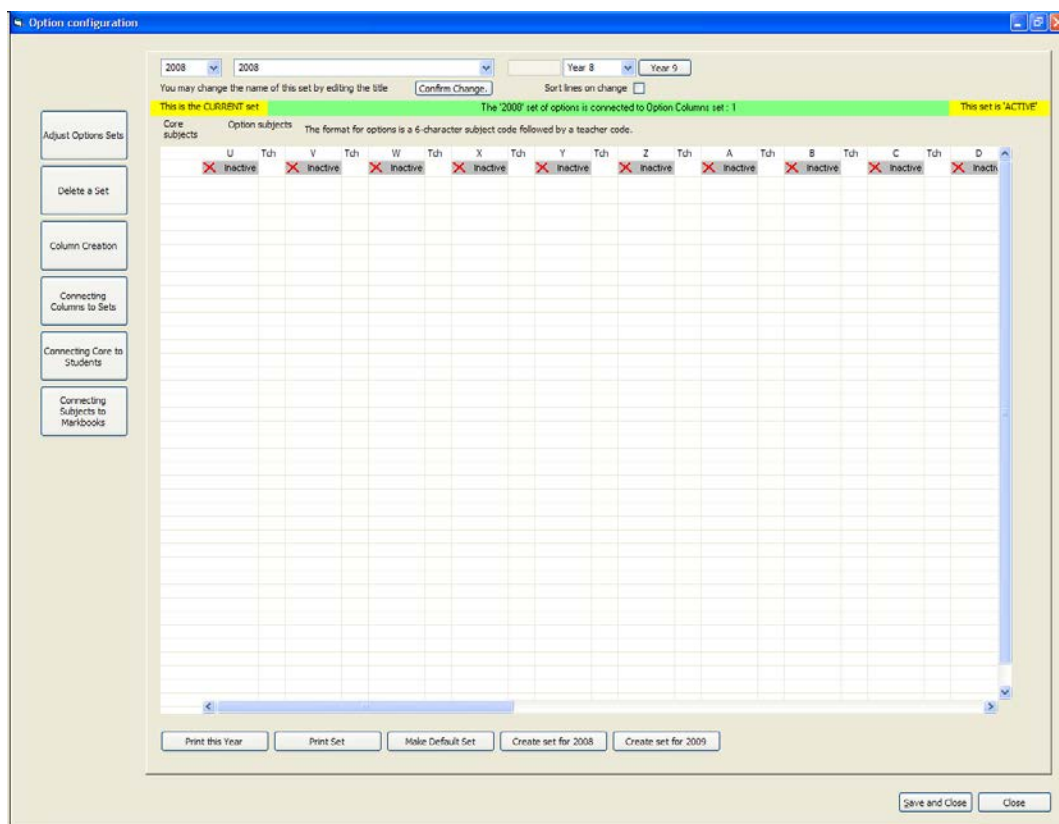


Illustration 16 : The main option maintenance screen

This is the main option maintenance screen. On it are displayed the 'default' or 'current' set of options.

At the top of the screen are three popup lists from which you can select :

1. The year for which you wish to examine options

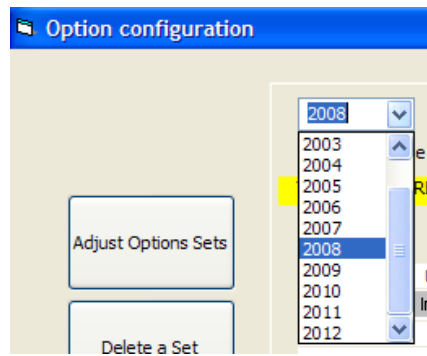


Illustration 17 : Selecting the year

2. The set of options from that year

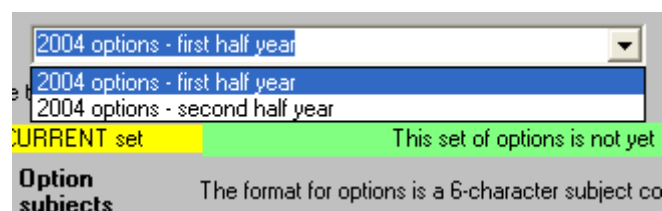


Illustration 18 : Selecting a set of options for the selected year

3. The students' year level which you wish to view.

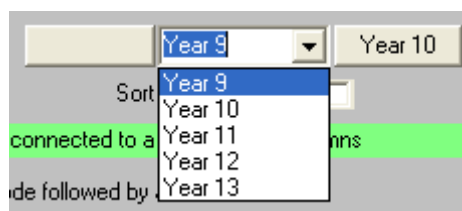


Illustration 19 : Selecting the year level

And, at the bottom of the screen, there are five buttons.

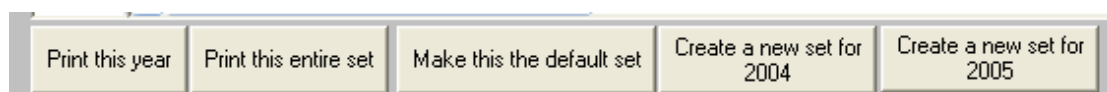


Illustration 20 : The 'Bottom row' buttons

If your second of the popups, the option set, is blank then you have not yet created any sets for the current year and you have two possibilities open to you:

If you have a suitable set of options from the previous year then you can copy them to the new year. Set the 'Year' popup at the top of the screen to the previous year, select the set you wish to copy from the second popup, then click on the fourth button at the bottom of the screen. Choose to duplicate the currently displayed set, or begin with a new blank set.

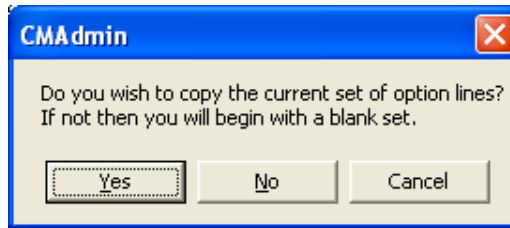


Illustration 21 : Copying a set for the current year

Click 'Yes' to proceed and the new set will be displayed, and you should then, at the top of the screen, give it a suitable name.

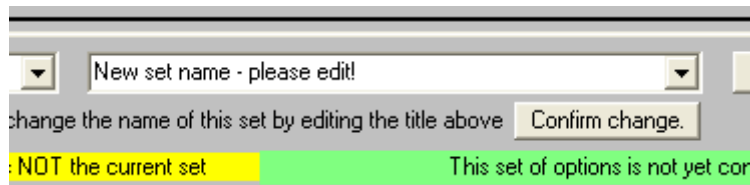


Illustration 22 : The new set needs a name

Type in the new name and click 'Confirm change'.

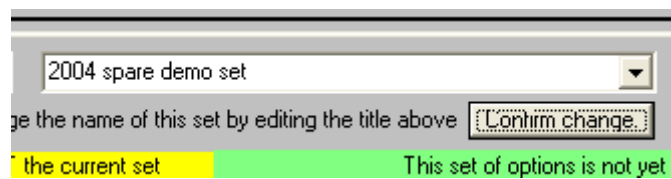


Illustration 23 : The new set has a name

1. Your second option is to click the same button WITHOUT returning to the new year to retrieve a previous set of options. The same choices will be presented to you (although it would make sense to select the second option – to start with a blank set of option lines) and, having created the set, you should name it as shown above.

Each set of options consists of twenty five columns (lines) of possibilities for each of your specified year levels.

The lines are named using single letters of the alphabet, as shown in the illustration below, which also shows that you can turn individual lines at each level either on or off – active or inactive.

Each option line is a 6-character subject code followed by a teacher code.

Tch	C	Tch	D	Tch	E	Tch	F	Tch	G	Tch
	✓ Active		✗ Inactive		✗ Inactive		✗ Inactive		✓ Active	
PS	9TE	ST								
WS										

Illustration 24 : Active and inactive option lines

Inactive options can be excluded from multi-option reports. Many schools do rotate their options during a year, particularly for junior classes, but do so using just a single set of options for the whole year. During the year particular lines are made inactive while others are made active.

Enter each of the possible options into the grid. Each option consists of a subject code (up to six characters in length) and the code of the teacher teaching it (two or three characters – it pays to use one or the other consistently throughout your school).

An example of a set of year 11 options is shown below.

A	Tch	B	Tch	C	Tch	D	Tch	E	Tch	F	Tch
✓ Active		✓ Active		✓ Active		✓ Active		✓ Active		✓ Active	
11MA	NU	11MU	OA	11HE	MC	11MM	BT	11AT	KA	11CP	BT
11EG	PK	11MS	MA	11EC	WS	11MD	PA	11HO	JS	11AT	KA
11WW	PA	11CL	MC	11AS	MK	11MD	HP	11SS	ED	11MA	RA
11EG	RT	11TD	DV	11GE	ST	11MD	MO	11TY	PS	11LE	PT
11GE	PT	11EG	HG	11LM	MO	11MD	DN	11EG	AK	11HE	JA
11HI	MO	11EG	GI	11EG	SK	11MD	DV	11EG	ST	11GE	TH
11MW	DV	11SS	SM	11SS	TH	11MD	PK	11LM	TM	11AC	HG
11SC	DN	11MA	CL	11MA	NU	11MD	RA	11MA	SM	11SC	DN
11MA	RA	11SC	MK	11SC	RY	11MD	PT	11SC	TY	11EG	FD
11TY	WK	11AC	AS	11TW	WT	11EG	AK	11GE	GP	11ES	AS
11MA	BT	11TW	WT	11MD	PN						

Illustration 25 : A set of option lines at year level 11

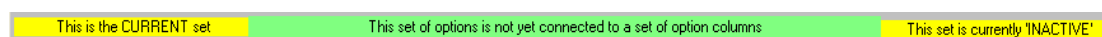
On the left where any 'core' subjects are to be listed. Remember, a 'core' subject is one taken by EVERY student in the given year level, generally in their form class groups. If a SINGLE student takes the subject outside of their core group then you should make the subject an option and provide it with a new line of its own.

In the example below the core subjects for year 9 have been listed. However, a potential problem has been created. 9MU has been listed as a core subject, but you can also see it in the first option column. Clearly, this will cause confusion, certainly at the time of Ministry returns – where ALL students take 9MU by virtue of it being a core subject, but some also take it as an option. If this is, indeed, your situation, then you should rename the option to something which will distinguish it from the core.

Core subjects	Option subjects
9EG	A
9MA	✓ Active
9SS	9TD
9SC	9WW
9PE	9TY
9AT	9CL
9ES	9MW
9MU	9MU
	9TY

Illustration 26 : Addition of the core subjects

At the top of the screen is an information line giving you further information about the status of a particular set.



### Illustration 27 : The information line

Once you have your first set of option lines, you should first 'Save changes' by clicking the button so labelled at the bottom of the screen. If you receive the following warning then the duplication of one or more subjects between the core and the option lines has been identified.

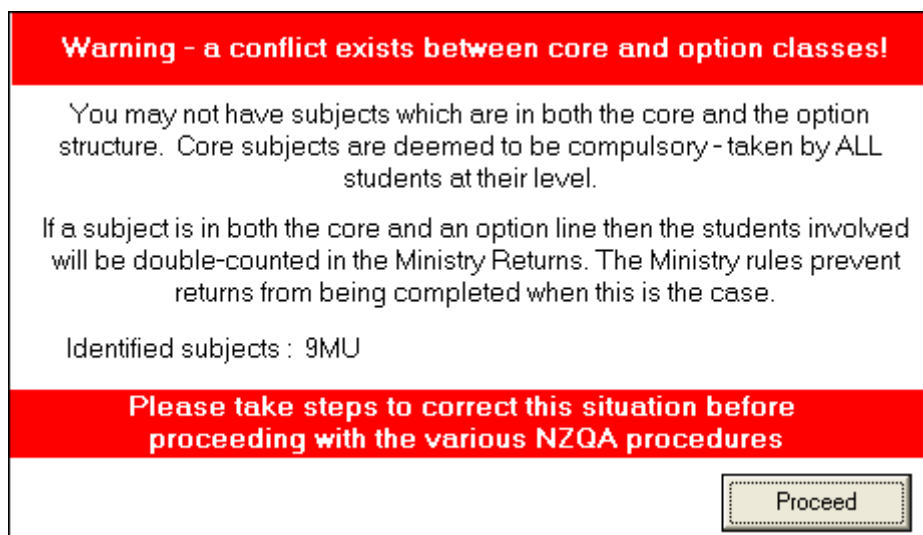


Illustration 28 : A clash is found

After clicking 'Proceed', you will be given the chance to have the offending code(s) removed from the core, as shown below.

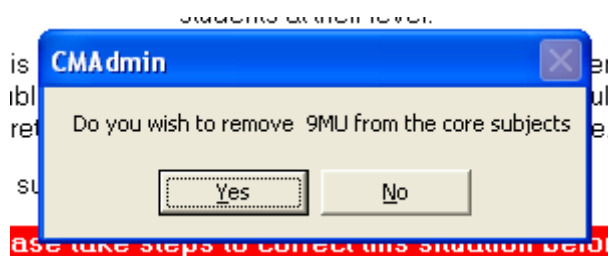


Illustration 29 : The offer to remove the clash(es)

Options cannot be saved while one or more option subjects also appear in the core list.

Once the set has been saved, you can still not make it the 'current' (or 'default') set. Before you can do this, it must be connected to a set of option columns. This is why we created our column set(s) in step 1 above.

To make the connection between our newly designed set of option lines and the previously created set of option columns, click on the fourth button on the left of the screen and you will arrive at the connection screen which is shown below. In the example I have two sets of option columns shown on the left, Set 1 and Set 2, and two sets of option lines have been created, named '2004 options – first half year' and '2004 options – second half year', and we shall establish both connections.

**Assigning sets of option lines to sets of students' option columns**

During a year you may operate more than one set of options. Each set should be stored in its own set of option columns.

Year

Option column set...	...is connected to..	Status
Set 1		
Set 2		

2004 options - first half year  
2004 options - second half year

To specify a connection, select the column set on the left hand display, then select the option set from the right hand display.

[Help! Explain all this!](#)

**N.B. Only those sets which have been connected to column sets will be available on each students option-attachment screen. To create a new column set click on the second-to-bottom button at the left of this screen.**

Illustration 30 : The connection screen

Establish the connections between the sets of columns, shown on the left, with the unconnected sets of options, shown on the right. To do this, first click in an empty space alongside one of the sets of columns, then select the set of options which you wish to connect to that set, as shown below.

Option column set...	...is connected to..	Status
Set 1		
Set 2		

**Click here** ↑

2004 options - first half year  
2004 options - second half year

**Then here** ←

Illustration 31 : Connecting the pairs

When you click on a column set on the left, the only option sets displayed on the right will be that one already connected to it, along with any currently unconnected sets.

The results of your efforts will be as shown below.

Year

Option column set...	...is connected to..	Status
Set 1	2004 options - first half year	Inactive
Set 2	2004 options - second half year	Inactive

Illustration 32 : The sets have been connected

If you inadvertently connect the wrong set then you can break the connection by right-clicking on the invalid connection, as shown below.

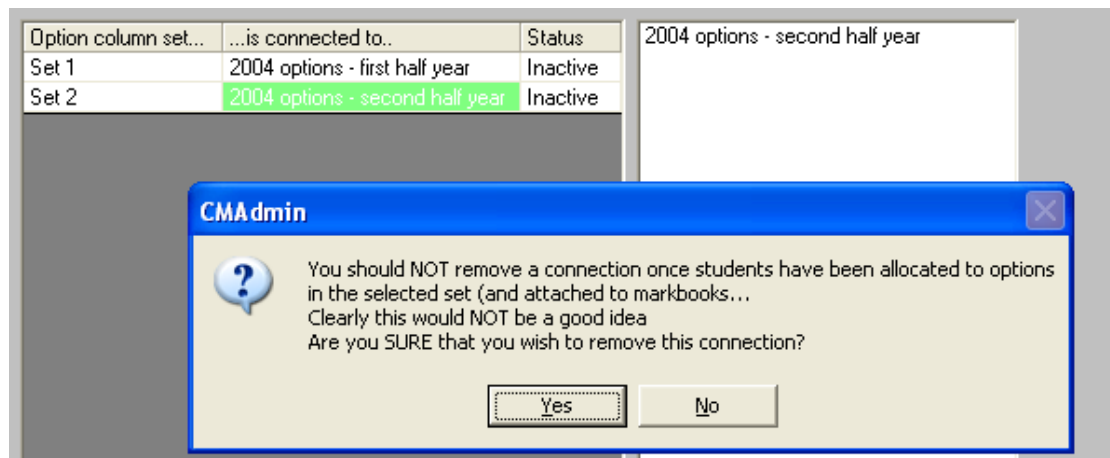
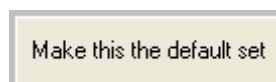


Illustration 33 : Disconnection of a set

Of course you should NOT break a connection once students have been allocated to their markbooks.

Some schools generate a number of 'test' sets of options. Normally, however, the only sets from Classroom Manager would be those which you actually intend to use during the year.

Finally, all that remains is to return to the first button to re-establish that the current set is actually active. Return to the first screen and click the button :



As a result, the current set will now also be active and this information will be confirmed in the top line.

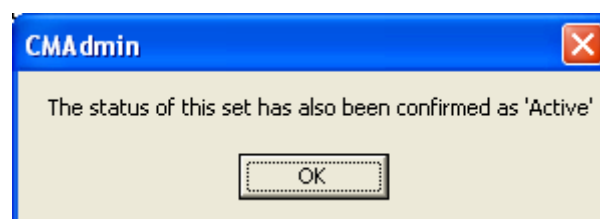


Illustration 34 : Our set is now active

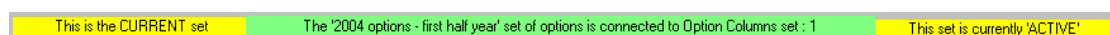


Illustration 35 : The information line

The first two buttons in the bottom row allow you to :

- Print the currently displayed set of options for just the year level selected.
- Print the currently displayed set of options for all year levels

And let's also look at the second main button on the left side of the screen :



### *Delete a set*

Should you have a set or sets of options which you do not intend to use during the year you might see fit to delete them. This is done by clicking the second button on the left hand side of the screen, then selecting the set to be deleted from the popup list which will be displayed, as shown below.

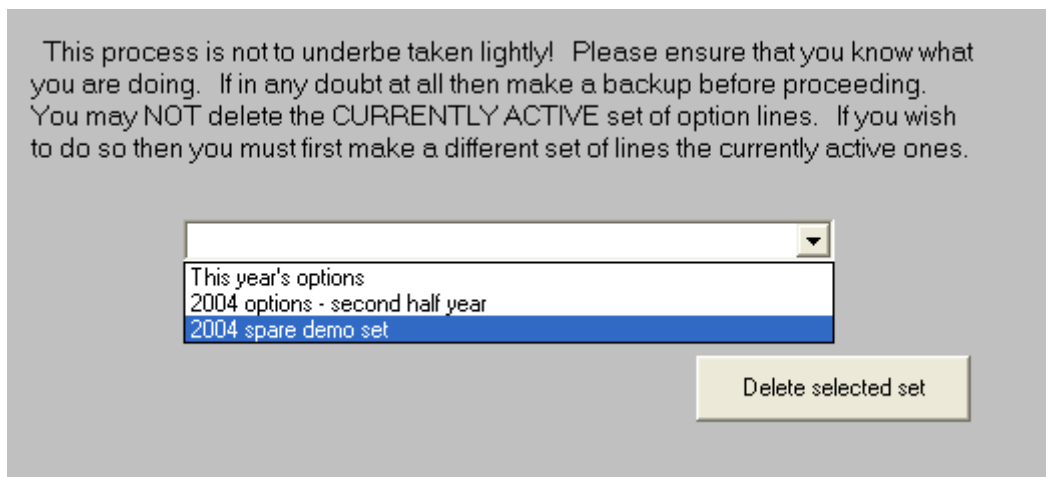


Illustration 36 : Deleting a set of options

Delete the spurious set created earlier and confirm the deletion by typing 'yes' in full.

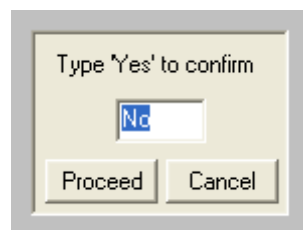


Illustration 37 : The final confirmation

### *Creating sets of columns for students' options*

In summary, to create one or more sets of columns to hold the students' subjects, click on the third button on the left. This brings us to the column creation screen, shown below.

**Creation of option/subject columns**

Options are stored in columns which appear under :

Category 1 : Record of Achievement  
Category 2 : Subject history  
Category 3 : Year

Columns are allocated in sets of twentyfive. You may request up to thirtyseven sets each year so that students may take several groups of options during the year.

Total no. of sets : 2 Change to :

Year :

Year category : 2004 FOUND

NOT ALL sets of option columns HAVE YET BEEN CREATED for 2004  
Core set of columns for 2004 have NOT YET been created.

Sets found for 2004

Illustration 38 : The column set creation screen

The arrows above point to the two buttons which you will shortly click. First, though, you must ensure that the number of sets requested is correct. This is done in the centre of the screen, as shown below.

Total no. of sets : 2 Change to :

Year :

Illustration 39 : Entering the required number of sets

Once done, click on the buttons and the sets will be created, as shown below

Sets found for 2004

Set 1  
Set 2  
Set : core

Illustration 40 : The sets have been created

Once created, you can confirm their existence by viewing the option columns via the column maintenance area, as described in the previous chapter. As you can see below, they are to be found under the categories 'Record of Achievement' / 'Subject history' / The year .... Where both sets of option columns and the core set will be found.

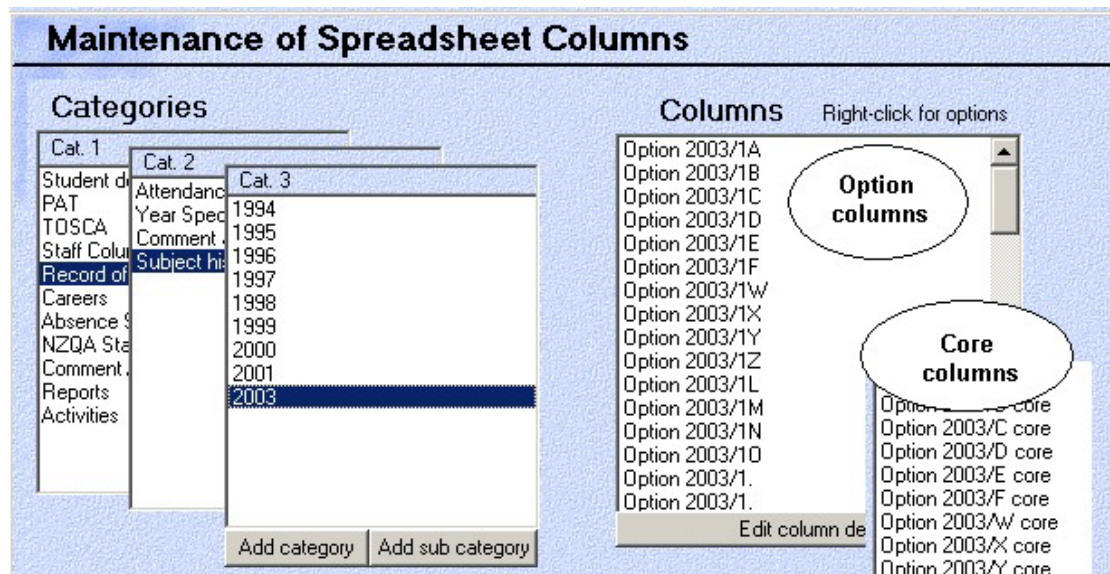


Illustration 41 : The sets of option columns

Connecting sets of options to column sets has been covered, and 'Connecting subjects to markbooks' is duplicated later in this section.

## 14.9 Subject details

Click 'Subject details' from the Configure Settings menu. This area is covered in full under NZQA Utilities user guide available from the side bar, or our website, where the following section has been, in part, copied.

Click on the 'Connect standards to subjects' button and the following screen will be displayed.

Here we are concerned with the tasks associated with NZQA and if you already have all of your subjects and options set up from the previous year, skip this section which deals with NZQA standards.

Illustration 42 : The subject connection screen

The screen is divided into four sections:

1. Down the left hand side of this screen will be displayed the official list of subjects from the Ministry of Education. Your school will offer most, if not all, of these subjects.
2. At the top of the right hand side are displayed the details relating to the currently selected subject.
3. Below that on the left is a list of the option or core subject codes by which they are recognised within your school
4. The remaining area displays the details relating to the currently selected option from the options list. (Rather than constantly referring to 'core' subjects and 'options' we shall, for the purposes of this chapter, refer to them all as simply options.)

Click on 'English' in the left hand column and its details are displayed in the top right panel, as shown below.

Illustration 43 : The subject details for 'English'

Each subject MUST have a 'Default Learning Area' selected from the list supplied by the Ministry of Education. The popup listing these possibilities is shown below.

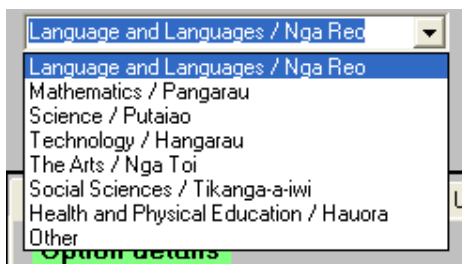


Illustration 44 : The Learning Areas popup

The Learning Area for English is 'Language and Languages / Nga Reo'. Each subject must subsequently correspond to one of the 'MOE Subject names', which come under the heading of the Learning Area category. For 'Language and Languages / Nga Reo' some of the possibilities are visible in the popup shown below.

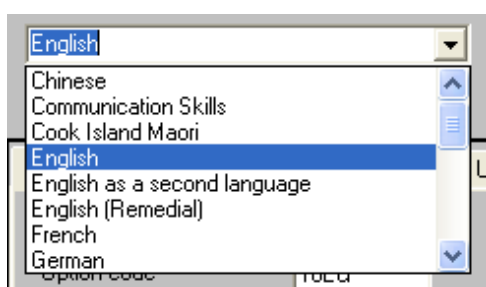


Illustration 45 : The Default MOE subject

It seems sensible that the name for the subject 'English' is 'English'.

The default MOE code 'ENGL' is automatically displayed and may not be edited. You may, on the other hand, edit your school code, displayed in the bottom right hand corner of the panel. In this case, the school is using the code 'EG' for its English classes.

Once you are satisfied with the entries for a particular subject, click on the button labelled 'Record subject changes'.

### Options

Turning our attention to the final two panels, we see below the specifications for the selection option '10EG' – presented on the first tab in the fourth panel.

Illustration 46 : The option details

The code, 10EG has been entered, but the 'Hours as if for full year' is still set at zero. We have a fast way of filling all of these in globally, and we shall come to that later in this chapter.

The 'Mode of instruction' is selected from the possibilities supplied by the Ministry and revealed via the popup shown below.

Illustration 47 : The Mode of instruction possibilities

The Ministry of Education have requested a further field titled 'Predominant mode' but have not yet finalised the possibilities for this field. In the meantime it has been disabled.

They also require a 'Learning Zone' which is generally the level at which the option is taught. Having extracted the options from the current option set, at which the levels are, of course, known, this entry should automatically be correctly entered for you, as shown below.

Illustration 48 : The Learning Zone possibilities

Finally, it is possible for a particular option to be 'Integrated' – i.e. split over two different Learning Areas. If this is the case then, as shown below, click on the option 'Integrated' and complete the four specifications for the second learning area. The last of these is automatically derived from the

previous two selections (which correspond to those in the 'Subject Details' as discussed earlier). An example (which is very spurious in the case of 10EG) is shown below.

Illustration 49 : Details for an 'Integrated' subject

*Attaching standards to options*

While this topic is not particularly relevant to Student Manager, we shall, for the sake of completeness, include it herein. The second tab reveals the option's connections to unit and achievement standards and is the most important section of this chapter.

Illustration 50 : The standards attached to an option – none yet!

The option 13EG is displayed above and has no standards yet attached.

At the top of this screen you can have the attached standards sorted either unit standards or achievement standards first.

You can also sort the selection list by code or by title using the left hand button above the list.



The second button in the same area allows you to elect to display ALL versions of currently active standards (Inactive standards cannot be connected...) or just the LATEST version of each active standard.

Below these two buttons are two options which allow you to toggle the display between unit standards and achievement standards.

You can, if you so wish, attach selected individual standards to a particular standard by clicking on the required standard in the list of available standards on the right. It would take you quite some time to attach all of the standards to all of the options. Fortunately, there is a faster, global method. This is accessed via the button on the left below the standards list.

However, before you do this you might wish to use the other button at the bottom of the screen to 'Remove ALL Achievement Standard connections' to your options. This allows you to start with a clean slate, which also includes the removal of now-obsolete standards from your options. This is a recommended step. The resulting confirmation message is shown below.

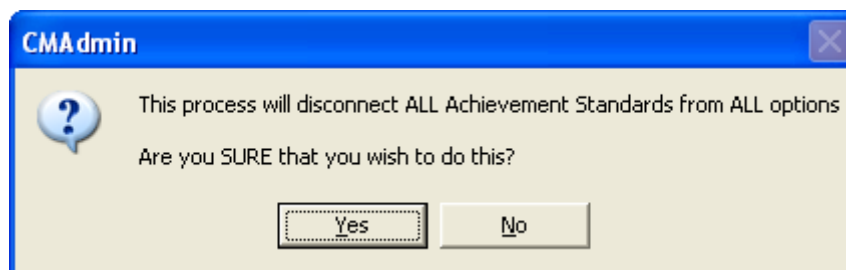


Illustration 51 : The confirmation message

Once you are ready to proceed with the attachment process, click on the left hand of the two buttons, labelled 'Global attachment of standards to options', and the following screen will be displayed.

The program has checked your currently active option lines and has identified the achievement standards which, in normal circumstances, would be attached to each of your options. These are all displayed on the screen below.

**Please note the message at the bottom of the screen:** if you find that one or more options are missing from this list then you might like to check your currently active option lines, as they generate the display, matching standards using the MOE subject codes attached to each subject.



### Global attachment of standards to options

For each option (centre column) those achievement standards which are currently unattached are shown in the left hand column and attached standards are shown in the right.

Please note : Only the LATEST VERSIONS of those standards prefaced by Ministry codes are listed below. Those prefaced by SFC- or Scholarship or a Ministry code OTHER than that belonging to a particular option (e.g. AGHD) and EARLIER versions will NOT be displayed and must be attached manually.

Either ...

Select ALL unattached standards

... or click (and highlight) those standards which you wish to transfer from either unattached to attached or vice versa. Once you have made you selection(s) click the 'Transfer' button below.

Transfer

Once you are satisfied with the attachments, click the 'Save changes' button to have these recorded in the database.

Save changes and exit

Unattached	Options	Attached
	11AC	
ACC01.1		
ACC01.2		
ACC01.3		
ACC01.4		
ACC01.5		
ACC01.6		
ACC01.7		
ACC01.8		
	12AC	
ACC02.1		
ACC02.2		
ACC02.3		
ACC02.4		
ACC02.5		
ACC02.6		

A missing option? Is it in your option lines?

Illustration 52 : The standards are currently all unattached

Click on the first button, to select all unattached standards for all options for all subjects and they will be selected, as shown below.

Please note : Only the LATEST VERSIONS of those standards prefaced by Ministry codes are listed below. Those prefaced by SFC- or Scholarship or a Ministry code OTHER than that belonging to a particular option (e.g. AGHD) and EARLIER versions will NOT be displayed and must be attached manually.

Either ...

Deselect ALL unattached standards

... or click (and highlight) those standards which you wish to transfer from either unattached to attached or vice versa. Once you have made you selection(s) click the 'Transfer' button below.

Transfer

Once you are satisfied with the attachments, click the 'Save changes' button to have these recorded in the database.

Save changes and exit

Unattached	Options	Attached
	11AC	
ACC01.1		
ACC01.2		
ACC01.3		
ACC01.4		
ACC01.5		
ACC01.6		
ACC01.7		
ACC01.8		
	12AC	
ACC02.1		
ACC02.2		
ACC02.3		
ACC02.4		
ACC02.5		
ACC02.6		

Illustration 53 : Standards selected for attachment

Next, click on the 'Transfer' button and the selected standards will be transferred from the left hand side of the screen (Unattached) to the right hand side (Attached), as shown below.

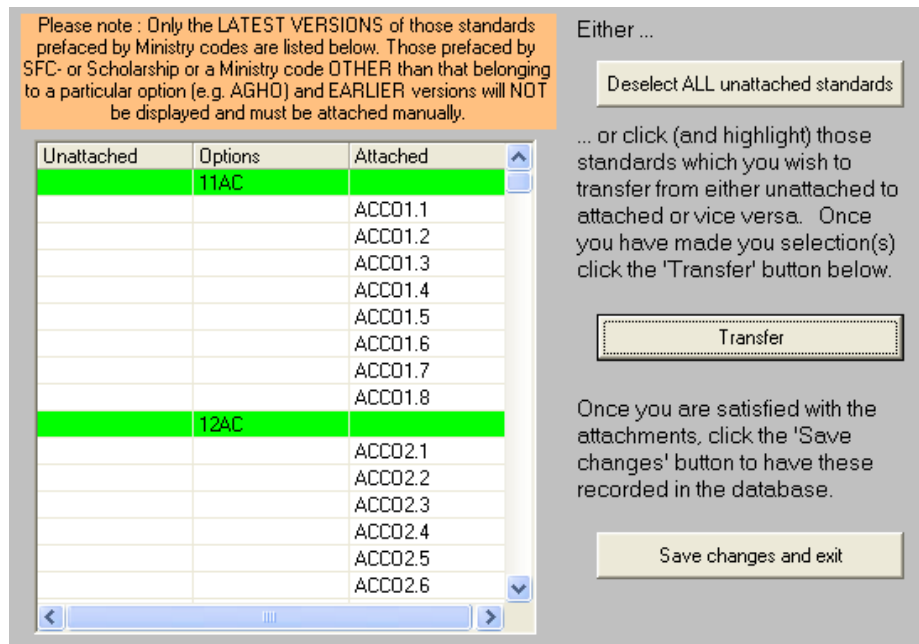


Illustration 54 : Transfer and ready for saving

Finally, click 'Save changes and exit' and all of the attachments will be made, and you will be returned to your options screen as shown below, this time with achievement standards connected to each of your options.

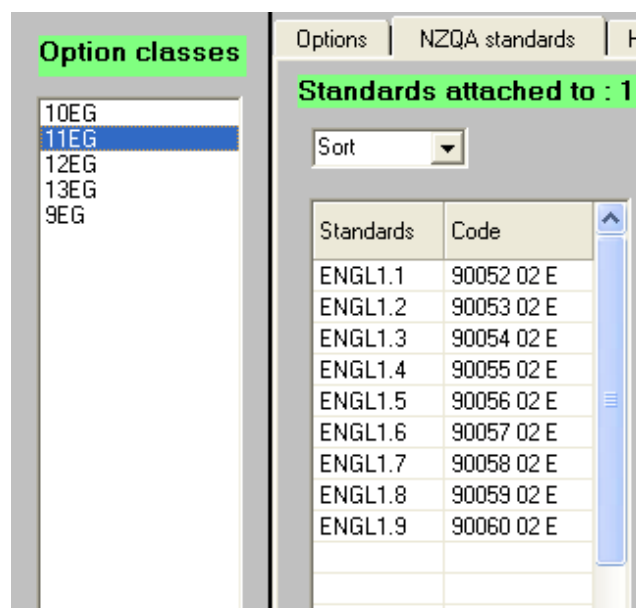


Illustration 55 : The standards are now attached

You might well have some individual adjustments to make, such as the attachment of unit standards to options (The global removal detailed above does not remove these), and the addition or removal of individual standards from individual options in your school's special cases. Connecting standards to options is complete.

### The setting of subject hours

The tedious task of individually specifying the hours occupied by each subject at each level is simplified using the utility accessed via the third tab on the 'Standards' panel, titled 'Hours'. When you click this tab then panels will reposition themselves on the screen to allow for more room for this process.

The screen for the process is shown below.

The screenshot shows the 'Hours' tab selected in the 'Standards' panel. The interface includes a navigation bar with tabs: 'Options', 'NZQA standards', 'Hours', 'Unattached options', and 'Print list'. Below the navigation bar, there is a section titled 'Default hour settings' with explanatory text. A table lists various options (e.g., 10AT, 10CL, 10CP, 10EG, 10ES, 10FR, 10HE, 10HO, 10MA, 10MS, 10MU, 10MU, 10PE, 10SC, 10SS, 10TD, 10TY, 11AC, 11AS, 11HO, 11MA) with a 'Hours' column next to each. To the right of the table, there is a text input field labeled 'Hours' containing the value '116'. Below the input field are two buttons: 'Set hours' and 'Record changes'.

Option	Hours
10AT	0
10CL	0
10CP	0
10EG	0
10ES	0
10FR	0
10HE	0
10HO	0
10MA	0
10MS	0
10MU	0
10MU	0
10PE	0
10SC	0
10SS	0
10TD	0
10TY	0
11AC	0
11AS	0
11HO	0
11MA	0

Illustration 57 : The global specification of hours

All of the options are listed and you can process them in groups which have a common number of hours.

**Please note:** it is MOST important that you enter the number of hours for which the option would occur if the option set to which it belongs is taught for the FULL year.

For those schools which operate a single set of options for the full year this will be a simple matter. For those who rotate sets of options, you will need to adjust the number of hours as if the set lasted all year. This enables the Ministry Of Education returns to calculate the correct figures, based on the proportions of the year which each set occupies.

In the example below all of the year 10 options have been selected and the figure of 116 hours has been entered.

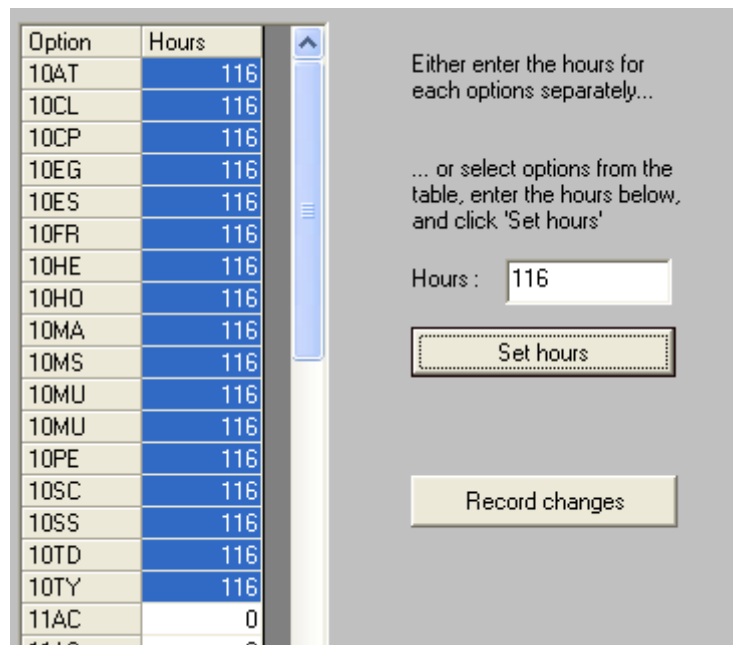


Illustration 58 : The Year 10 hours have been set ...

When the 'Set hours' button is clicked, the specified number is applied to each of the selected options.

These entries can now be adjusted, as shown below, to reflect the correct values for each.

Complete the process for all options, then click the button labelled 'Record changes'.

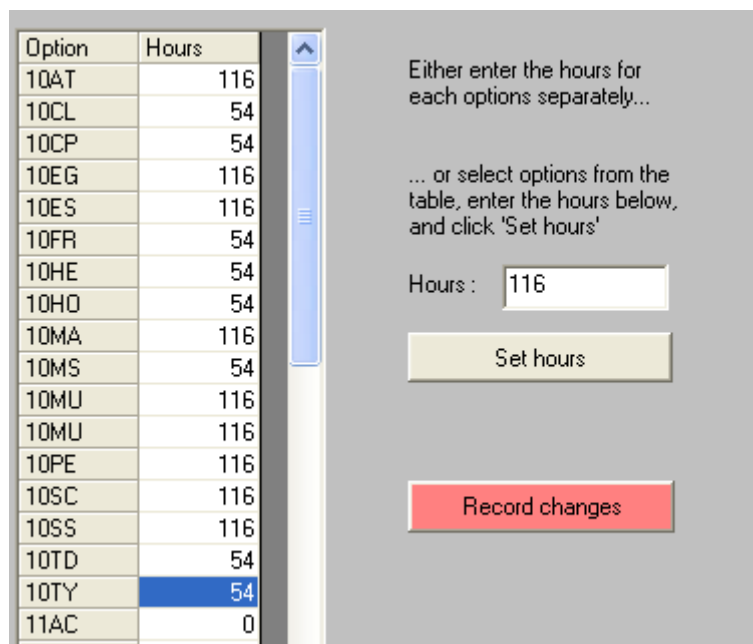


Illustration 59 : and have been individually adjusted

The results of the process are shown in the example below, where 10EG now has its total of 116 hours displayed.

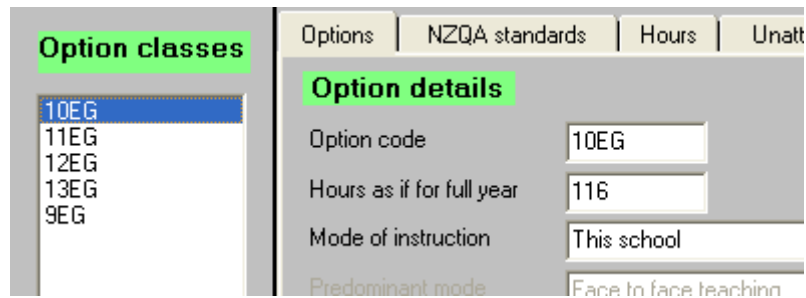


Illustration 60 : An example of the newly specified hours

*Unattached options*

It is clearly important that every subject in your set of options is attached to a subject! This utility identifies those options not currently attached to subjects. An example of the resulting display is shown below. This is accessed by clicking on the fourth tab of the 'Standards' panel.

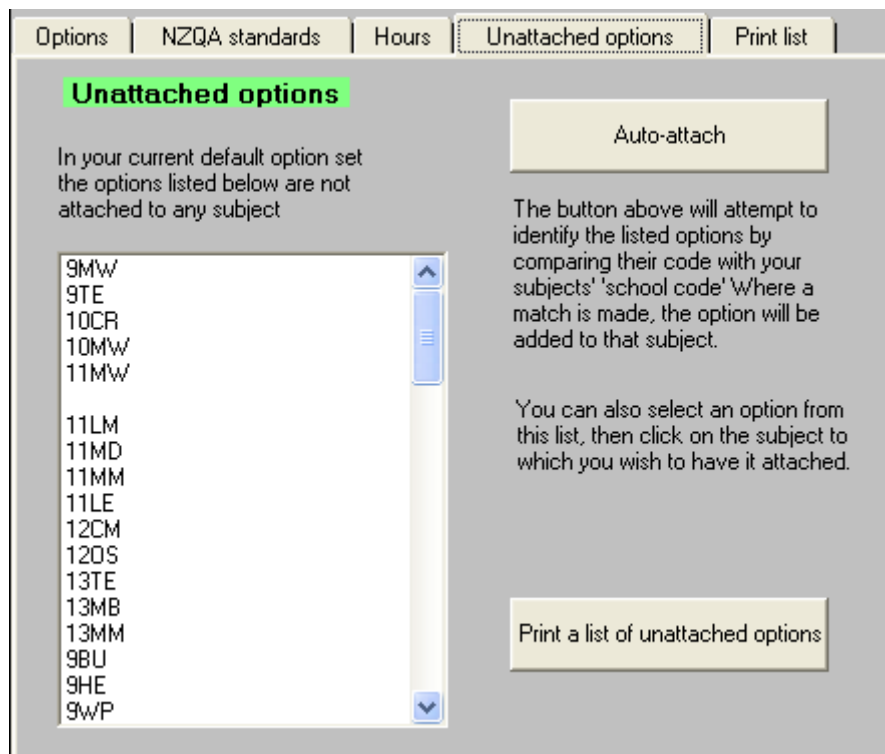


Illustration 61 : Unattached options identified

The button at the top right of the screen allows you to have as many as possible of these unattached options connected to their subjects. This is done by matching the option codes against those specified earlier in the chapter as the default code for each subject. The results of the auto-attachment are shown below.

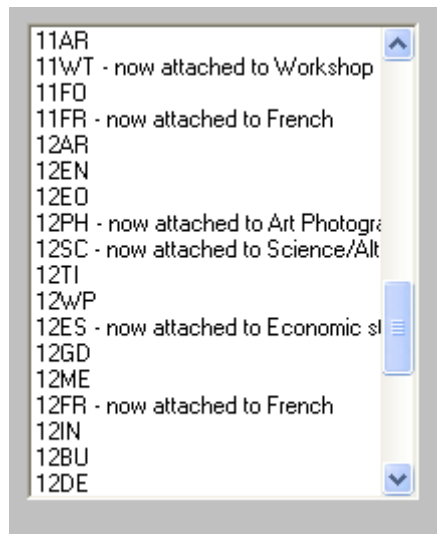


Illustration 62 : Some have been auto-attached

You should now complete the process manually, using the option to print the list as an aid.

*Printing lists of subjects, options and their standards*

The final tab allows you to print lists in various formats of the connections between your subjects, their options and, in turn, their attached standards. An example of the printing process, and the options available, is shown below.

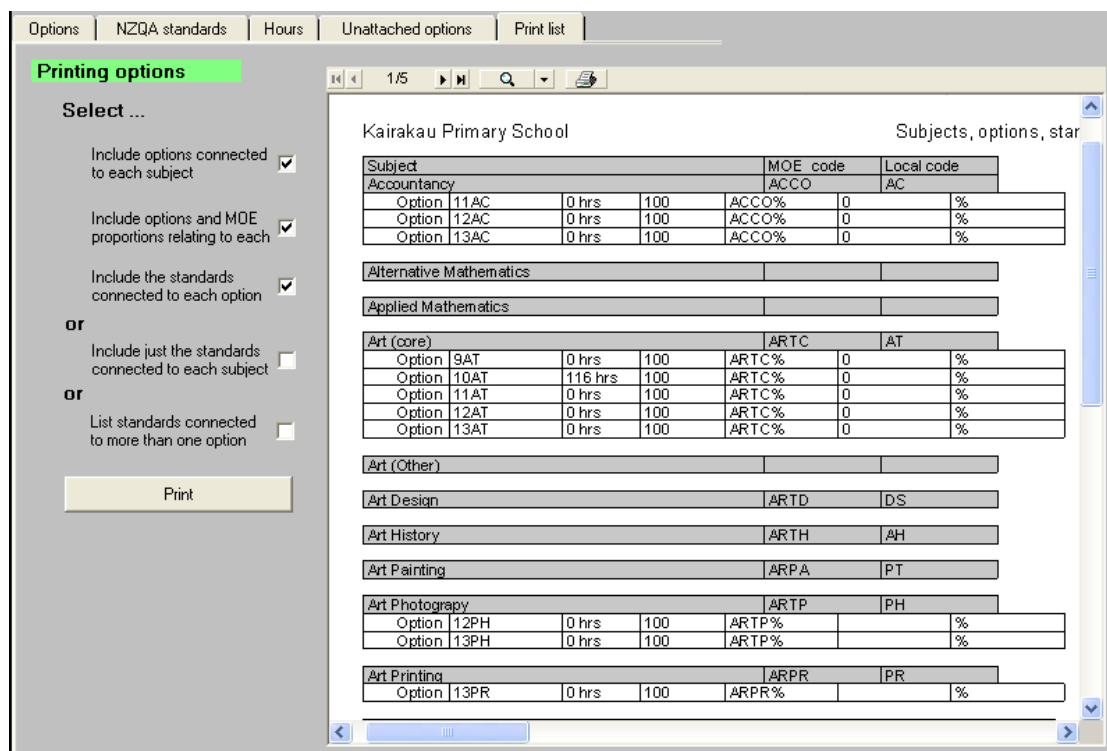


Illustration 63 : The various printing options

## 14.10 Markbook connections

From the main menu Configure Settings > Timetable Option Details > Connecting Subjects to Markbooks. It is also provided elsewhere in CMAAdmin – under the ‘Specify Markbook Details’ button which appears both on the ‘NZQA Utilities’ screen and the ‘Other Utilities’ screen.

Click ‘Core Markbook Attachments’ for the connection screen displayed below.

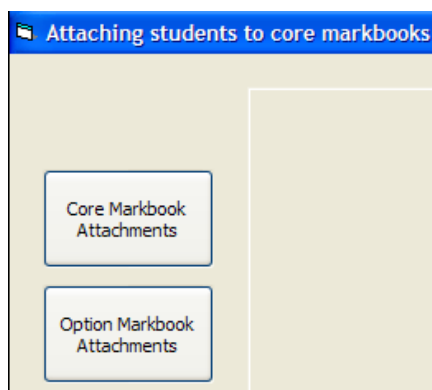


Illustration 64 : The options for connecting subjects to markbooks

### 1. The connection of core subjects to their markbooks

To demonstrate students were disconnected from their markbooks for both core and options and after several minutes of typing zeros I decided that a sample was sufficient.

The screen below shows the results. There are now a number of year nine students not connected to their markbooks.

Level	Subject	Markbook	Attached	Unattached
9	9ENG	9ENG 2008	144	0
9	9MAT	9MAT 2008	144	0
9	9SCI	9SCI 2008	144	0
9	9SOC	9SOC 2008	144	0
9	9PED	9PED 2008	144	0
9	9HTH	9HTH 2008	144	0
10	10ENG	10ENG 2008	177	1
10	10MAT	10MAT 2008	177	1
10	10SCI	10SCI 2008	177	1
10	10SOC	10SOC 2008	177	1
10	10PED	10PED 2008	177	1

Illustration 65 : The core subjects have some unconnected students

To connect them, click on the ‘Proceed to (re)attach unattached students’ button.

But, before you do so, you should ensure that you are correctly connected to the current timetable in Student Manager. The connection is shown on the right hand side of the screen and, if it is not correct, click on the 'Alter timetable link' button.

This will lead you to the timetable link window, shown below.

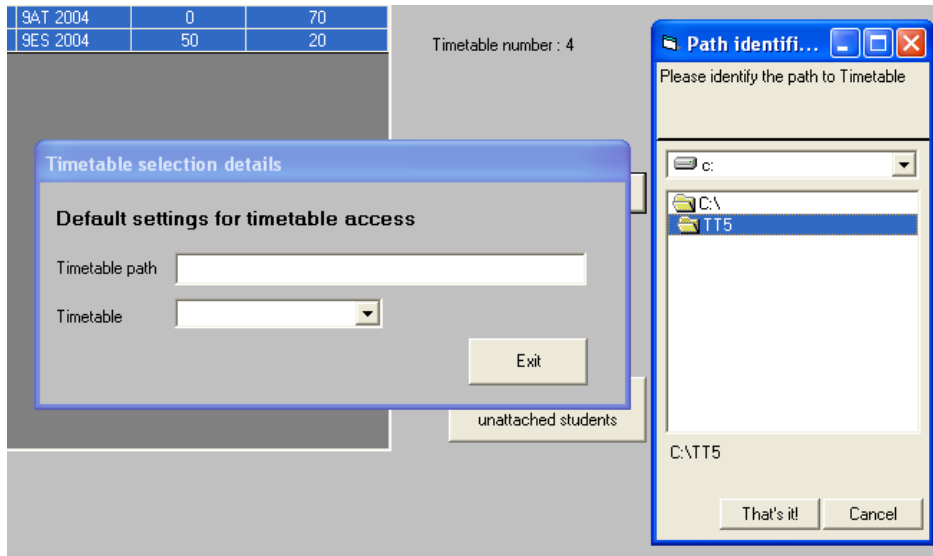


Illustration 66 : Linking to the current timetable directory

The first task is to identify the timetable path. Some will be using \tt5 as the path. If you have upgraded to Student Manager then your path will be \ttsm. Once you have established the path, the timetables found at that location will be displayed, and you can make your selection, as shown below.

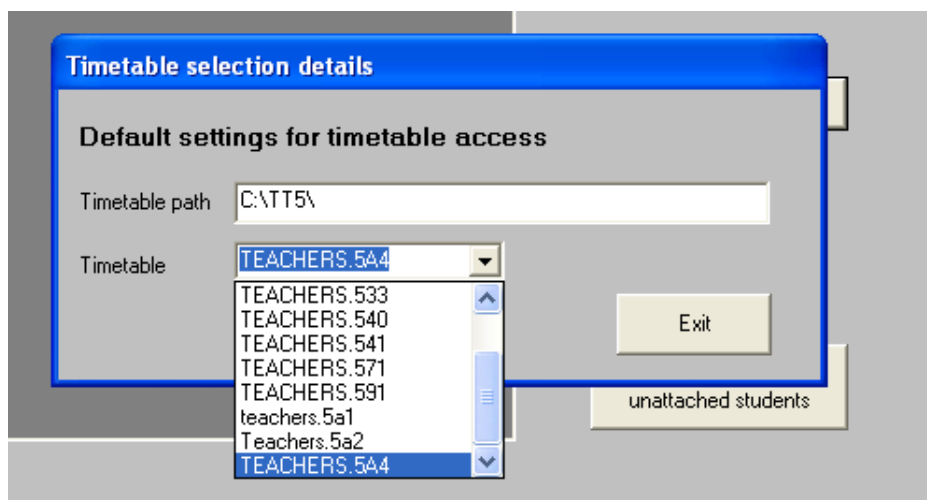


Illustration 67 : Selecting the timetable

Now you can proceed to attach your disconnected core subjects... as shown below.

**Note:** In Student Manager the path to Timetable Assistant will be \TTSM.



**Markbook attachments for Core subjects in 2004**

Current situation      Current set : 2004 options - first half year in 2004

Select those subjects which you would like to process

Level	Subject	Markbook	Attached	Unattached
9	9EG	9EG 2004	71	0
9	9MA	9MA 2004	71	0
9	9SS	9SS 2004	71	0
9	9SC	9SC 2004	71	0
9	9PE	9PE 2004	127	0
9	9AT	9AT 2004	70	0
9	9ES	9ES 2004	120	0

In order to be able to identify the teachers of each core class, a link must have been established to a current timetable.

Timetable path : C:\TT5\  
Timetable number : 4

Alter timetable link

9ES

Proceed to (re)attach unattached students

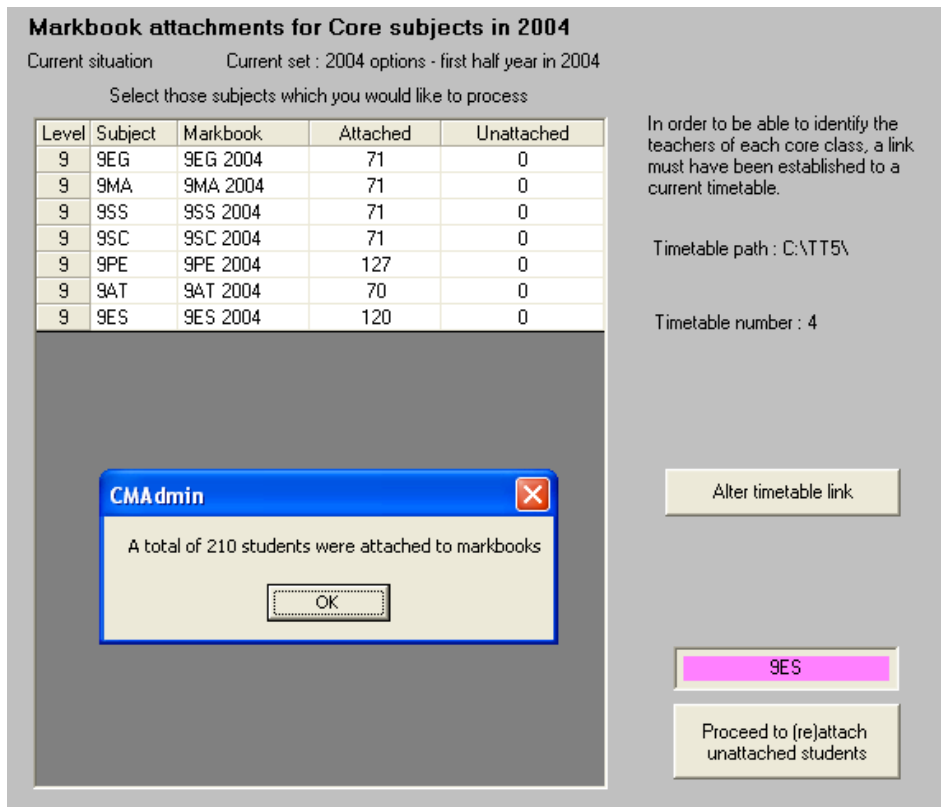


Illustration 68 : The core subjects have now been attached

The core subjects are now all in their markbooks.

## 2. Connection of option subjects to their markbooks

When you click on the second button you will receive the following message as the main screen is displayed. It draws your attention to the fact that you can right-click on numbers on the option attachment screen.

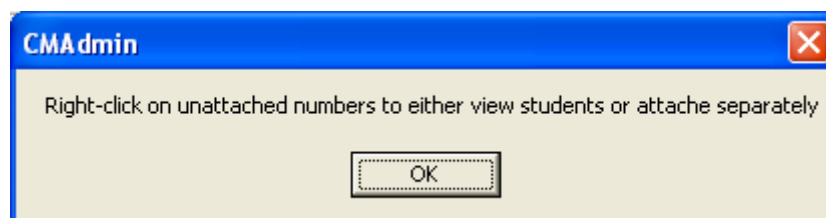


Illustration 69 : An alert concerning the use of the following screen

**Option Markbook attachments**

Year: 2004    Level: Year 11    Attach unattached to 2004 options - first half year

Option	Markbook	Col Set 1		Col Set 2	
		2004 options - first half year	2004 options - second half year	Attached	Unattached
		0	0	0	0
11AC	11AC 2004	17	0	0	0
11AR	11MW 2004	7	5	0	0
11AS	11AS 2004	2	3	0	0
11AT	11AT 2004	10	1	0	0
11CL	11CL 2004	3	0	0	0
11CP	11CP 2004	17	0	0	0
11EC	11EC 2004	0	0	0	0
11EN	11MA 2004	59	20	0	0
11EO	11EG 2004	65	32	0	0
11ES	11ES 2004	8	1	0	0
11FO	11TY 2004	7	8	0	0
11FR	11MU 2004	16	0	0	0
11GD	11WW 2004	1	2	0	0
11HE	11HE 2004	8	3	0	0
11HO	11HO 2004	8	0	0	0
11JA	11GE 2004	31	5	0	0
11LE	11LE 2004	1	0	0	0
11LM	11LM 2004	10	4	0	0
11MD	11MD 2004	17	70	0	0
11MM	11MA 2004	0	0	0	0
11PE	11MS 2004	10	0	0	0
11SS	11SS 2004	33	6	0	0
11TD	11TD 2004	11	0	0	0
11TW	11TW 2004	0	0	0	0
11WP	11HI 2004	3	2	0	0
11WT	11SC 2004	52	11	0	0

Illustration 70 : There are several unattached options in the first set.

To see a particular year level's option connections, select the required level at the top of the screen. The connections for all of your sets of columns will be displayed. In the illustration above, no students have yet had options recorded in the second set for the year. Shown below is the small popup menu enabling you to identify students in each cell of the grid.

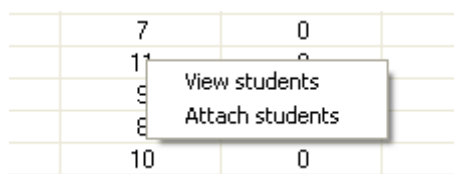


Illustration 95 : The popup menu accessed by right-clicking a number

Once you are ready to proceed, click on the green button at the top right hand corner of the screen, and the various connections to markbooks will be made, after which the green button will change, allowing you to use it to identify a further year level. Shown below is the result of the connection process.

**Option Markbook attachments**

Year  Level

Option	Markbook	Col Set 1		Col Set 2	
		2004 options - first half year		2004 options - second half year	
		Attached	Unattached	Attached	Unattached
		0	0	0	0
11AC	11AC 2004	17	0	0	0
11AR	11MW 2004	12	0	0	0
11AS	11AS 2004	5	0	0	0
11AT	11AT 2004	11	0	0	0
11CL	11CL 2004	3	0	0	0
11CP	11CP 2004	17	0	0	0
11EC	11EC 2004	0	0	0	0
11EN	11MA 2004	79	0	0	0
11EO	11EG 2004	97	0	0	0
11ES	11ES 2004	9	0	0	0
11FO	11TY 2004	15	0	0	0
11FR	11MU 2004	16	0	0	0
11GD	11Ww 2004	3	0	0	0
11HE	11HE 2004	11	0	0	0
11HO	11HO 2004	8	0	0	0
11JA	11GE 2004	36	0	0	0
11LE	11LE 2004	1	0	0	0
11LM	11LM 2004	14	0	0	0
11MD	11MD 2004	87	0	0	0
11MM	11MA 2004	0	0	0	0
11PE	11MS 2004	10	0	0	0
11SS	11SS 2004	39	0	0	0
11TD	11TD 2004	11	0	0	0
11TW	11Tw 2004	0	0	0	0
11WP	11HI 2004	5	0	0	0
11WT	11SC 2004	63	0	0	0

Illustration 71 : All unattached options are now attached

Now we have reached the stage where all of the options have been configured, all of the students have been allocated their options, all of the markbooks have been set up for the year, and all of the students are connected to both their core and option subjects markbooks.

### 14.11 Calendar

The Absence package uses a school calendar to keep track of the days the school is open. The Calendar is no longer configurable in Student Manager.

### 14.12 An overview of Teachers and their Dossiers

'Staff and Their Dossiers' and 'Document Management' are covered below.

Teachers and Administrators use Student Manager and so must have the right to access at least some of the functions and processes of Student Manager. Staff members are allocated rights by virtue of being members of one or more 'groups' and a group is an entity which has certain selected rights. We have already dealt with the process of maintaining groups and the allocation of rights to each group.

Now to the staff members who use the module. Each staff member must have certain personal details recorded in the staff database associated with Student Manager. Their rights within the package are allocated by making them members of one or more groups.

Most administrators will use Student Manager directly, without using dossiers. Others may use dossiers to allow them to access just a small section of the database. Dossiers have been described as being collections of selected students, columns and documents.

An old Waiopahu College staff file may have been used in the past without gaining permission from the staff. We trust this is seen as a tribute to a fine group of teachers.

### 14.13 Teachers' personal details

To access this area click on the main menu button 'Teachers and their dossiers'. The main staff details screen will appear as shown below.

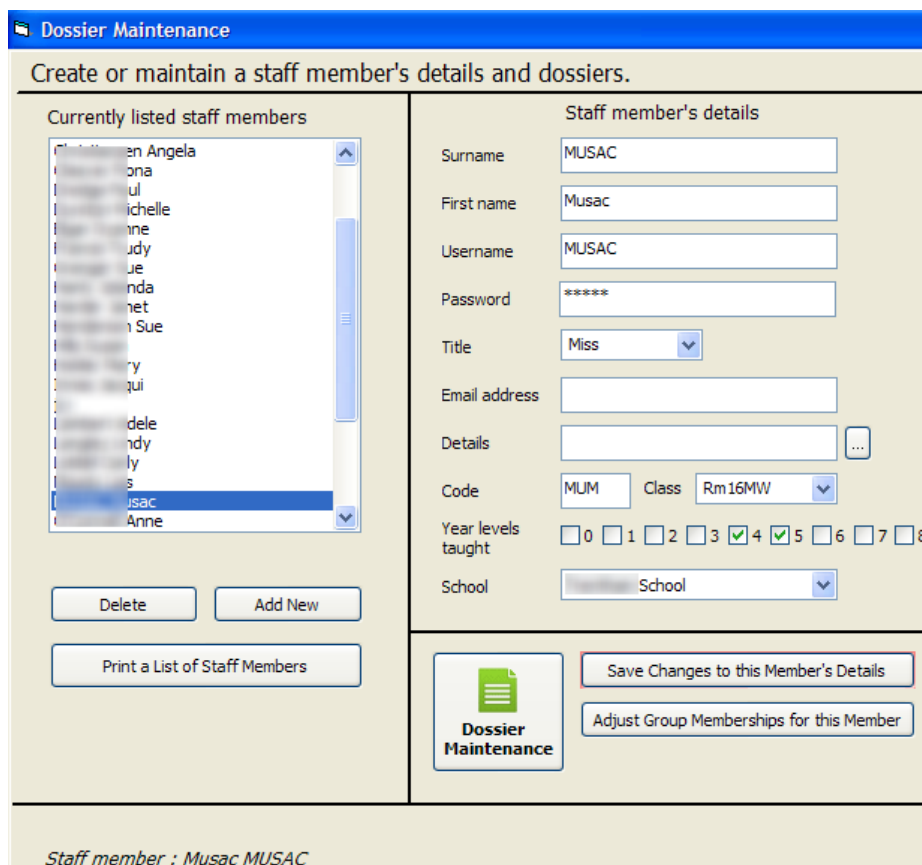


Illustration 2 : The staff details screen.

When you first arrive at this screen the only teacher known will be a certain teacher known as MUSAC. Once you have added a staff member with comprehensive rights you should change the password of 'MUSAC' to prevent others from gaining unauthorised access.

To add a new staff member, click on the 'Add new' button and enter their details on the right hand side of the screen.

Click on the surname field and enter the various pieces of information (surname, first name) a password which this teacher may use (passwords may be up to 6 characters in length, passwords will be encoded and stored encoded in their onward files).

The title of the teacher should be selected in the next pull down combo from the list of possibilities available. If you have other possibilities then you do not at this stage have the option to add those to the pull down. We would have to add those for you.

The teacher's code is the most important part of the teacher - more important even than their surname or first name! Their code is used to identify the dossiers belonging to a particular teacher. Codes may be either two or three alphabetic characters, may not be duplicated, and may not contain digits! Please enter a suitable code that is unique to the teacher. (Not UUU - we have used this one!) One enthusiast in a large Auckland girls' school chose to begin each teacher's code with a / as she felt that options appearing as 12MA/BT were easier to interpret. Many changes throughout the package were made to enable her to continue this practice!

'Class', 'Details' and 'Email address' are optional but each of the others, including the school of which he or she is a staff member (remember CM can operate in multi-school mode) are required.

The 'details' section may be accessed in full by pressing the small button with the three dots at the right-hand side of the screen. If you wish you can add a considerable amount of detail for each teacher.

At this point, before doing anything else, you should click 'Save' to record your new teacher's details. Now he or she will appear in the left hand list of teachers.

For the allocation of group membership(s) for the staff member click 'Adjust Group Memberships' and the allocation screen will appear.

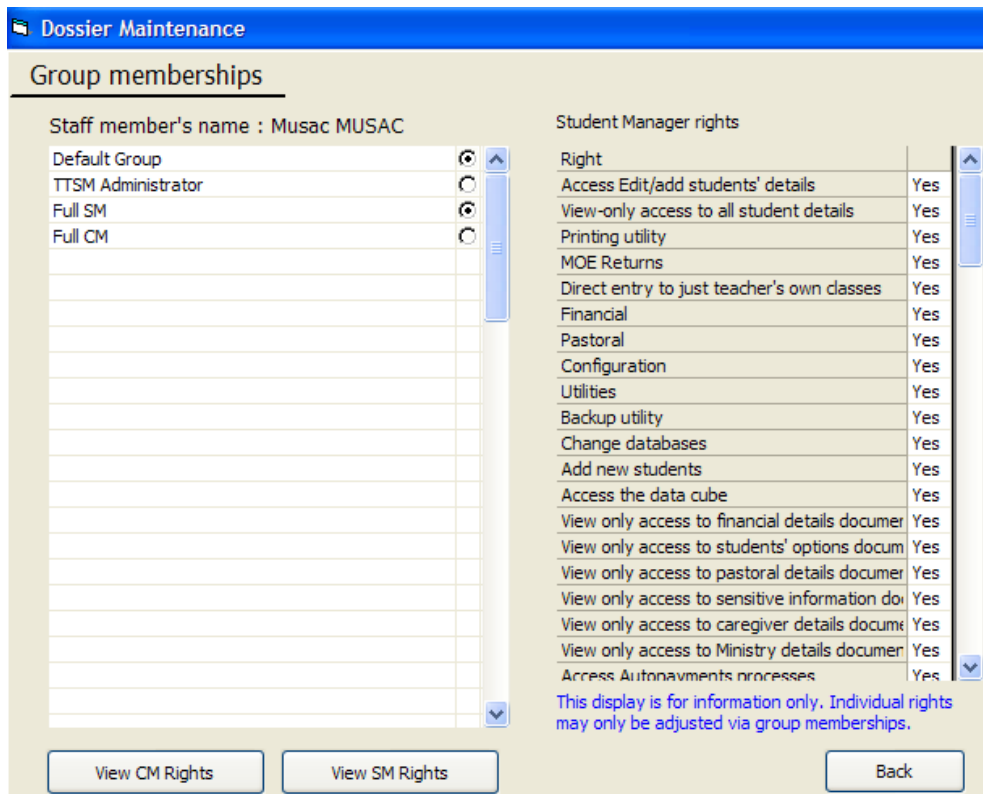


Illustration 5 : Allocation of group memberships to a staff member

A list of the available groups appears on the left-hand side of the screen and you should click on the option buttons nominating membership to particular groups. Remember that each group has certain rights within the package and by allocating a teacher to a particular group the teacher gains the rights of that group.

A teacher may belong to several groups, and each teacher's rights will be the maximum access gained through membership of any group. In other words, if one group which a teacher belongs to is NOT allowed to perform a particular function and another group to which the teacher belongs IS allowed to perform a particular function then the teacher concerned WILL be able to perform that particular function. The rights which group memberships confer on the teacher concerned are displayed on the right hand side of the screen.

Once you have supplied the groups to your satisfaction click on the 'Exit' button.

You may return at any time and click on a teacher on the list on the left-hand side and their details will appear on the right-hand side and you may change them.

Naturally it is not desirable to change a teacher's code once they have dossiers allocated to them. Should you change the code on a teacher then any dossiers using that teachers' code will be adjusted to reflect the new information but this cannot affect those dossiers already merged to remote computers. Please avoid changing a teacher's code. We have tried to cover most bases automatically but cannot guarantee that all of the steps we have taken will be sufficient to completely effect a change.

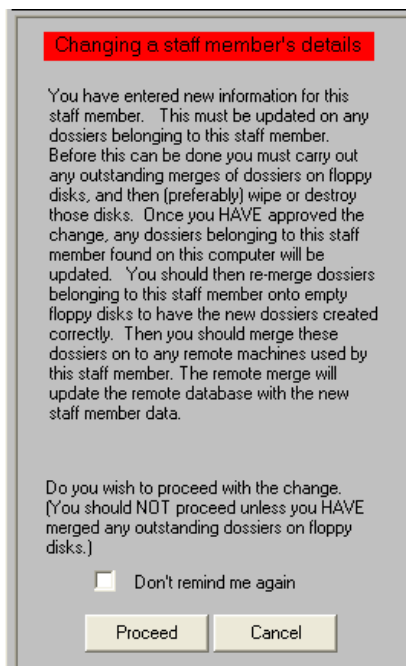


Illustration 6: The screen which appears when you change a teacher's code

You can print a list of staff members, via the dialogue shown below.

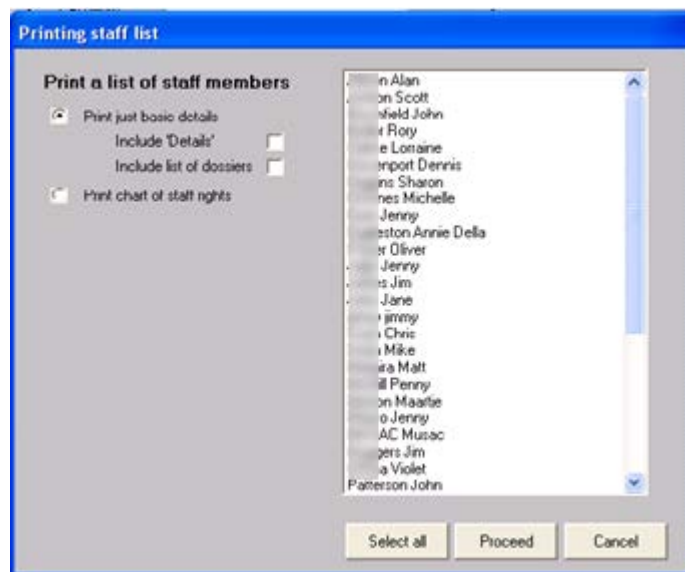


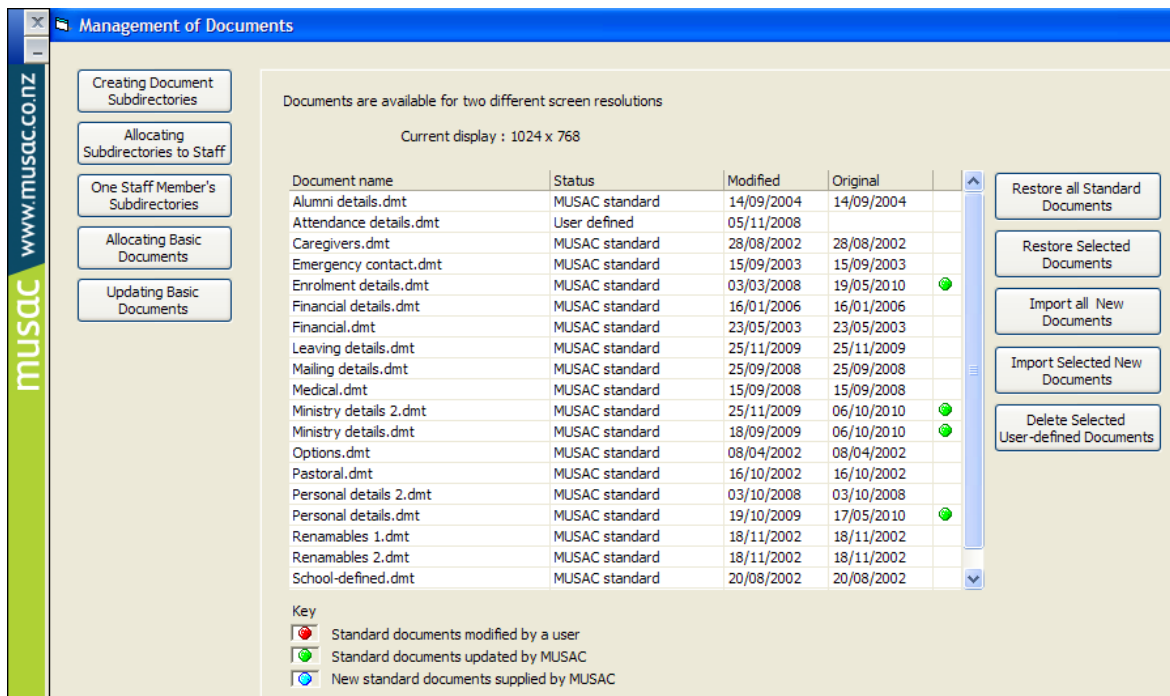
Illustration 7: Printing options

Next we turn to teachers' dossiers, accessed via the large 'Dossier Maintenance' button on the teacher details screen. Select the staff member for whom you wish to manage dossiers then click on this button.

## 14.14 Managing documents

Click 'Document Management'. At the heart of student data editing and viewing are the documents. Documents are held in subdirectories (\smdocs for 1024 x 768 resolution). In addition to these you can create your own document subdirectories and move documents between directories. Each teacher may have one or more of these directories allocated to him or her and hence have access to the documents contained therein.

In Student Manager dossier creation, the teacher is linked to the available year level columns according to the teacher's year level/s taught. In CM Administrator > Assessment Tool Selector the required assessments for new teachers are to be configured, which will install the required columns and ensure the documents are available. This updates the teacher's dossiers to show the relevant selected documents, or for new teachers click 'Auto Create Dossiers' button.



The screenshot shows the 'Management of Documents' window. On the left is a sidebar with the MUSAC logo and the URL www.musac.co.nz. The main area contains a table of documents with columns for Document name, Status, Modified, and Original. A 'Key' section at the bottom left explains the status icons: a red circle for standard documents modified by a user, a green circle for standard documents updated by MUSAC, and a blue circle for new standard documents supplied by MUSAC. On the right side, there are several buttons for document management: 'Restore all Standard Documents', 'Restore Selected Documents', 'Import all New Documents', 'Import Selected New Documents', and 'Delete Selected User-defined Documents'.

Document name	Status	Modified	Original	
Alumni details.dmt	MUSAC standard	14/09/2004	14/09/2004	
Attendance details.dmt	User defined	05/11/2008		
Caregivers.dmt	MUSAC standard	28/08/2002	28/08/2002	
Emergency contact.dmt	MUSAC standard	15/09/2003	15/09/2003	
Enrolment details.dmt	MUSAC standard	03/03/2008	19/05/2010	●
Financial details.dmt	MUSAC standard	16/01/2006	16/01/2006	
Financial.dmt	MUSAC standard	23/05/2003	23/05/2003	
Leaving details.dmt	MUSAC standard	25/11/2009	25/11/2009	
Mailing details.dmt	MUSAC standard	25/09/2008	25/09/2008	
Medical.dmt	MUSAC standard	15/09/2008	15/09/2008	
Ministry details 2.dmt	MUSAC standard	25/11/2009	06/10/2010	●
Ministry details.dmt	MUSAC standard	18/09/2009	06/10/2010	●
Options.dmt	MUSAC standard	08/04/2002	08/04/2002	
Pastoral.dmt	MUSAC standard	16/10/2002	16/10/2002	
Personal details 2.dmt	MUSAC standard	03/10/2008	03/10/2008	
Personal details.dmt	MUSAC standard	19/10/2009	17/05/2010	●
Renamables 1.dmt	MUSAC standard	18/11/2002	18/11/2002	
Renamables 2.dmt	MUSAC standard	18/11/2002	18/11/2002	
School-defined.dmt	MUSAC standard	20/08/2002	20/08/2002	

Illustration 24 : The document management options

The main screen provides access to the various processes.



### Creating document subdirectories

This utility allows you to manage the various document subdirectories available for use by Student Manager. Subdirectories must be off the \cm\documents\ directory, which should not contain any documents itself.

Document subdirectories	Documents	Destination subdirectory
Literacy Numeracy NationalStandards NCEA Details old PAT Profile STAR SYN Literacy Numeracy		Literacy Numeracy NationalStandards NCEA Details old PAT Profile STAR SYN Literacy Numeracy
<input type="button" value="Add a New Subdirectory"/>	<input type="button" value="Delete Selected Documents"/>	<input type="button" value="Move or Copy"/>

Subdirectory name

Move  
Or  
 Copy  
Selected documents to

Illustration 25 : Creation of document subdirectories

By selecting a subdirectory from the left hand list, the documents which it contains are displayed in the centre list. You can select one or more of these documents and either move them or copy them to a directory selected from the right hand list.

To create a new subdirectory, click on the 'Add a new subdirectory' button and enter the name of the subdirectory into the box provided. Please DO NOT use symbols such as / or \ in your subdirectory names. Keep them VERY simple.

### Allocating subdirectories to staff members

Select one or more staff members from the staff list in the left column, then select one or more subdirectories from the centre list.

When you then click 'Save selection' each staff member has the selected directories ADDED to his or her existing list. You can see the documents contained in one or more of the subdirectories as you click on their name in the centre list.

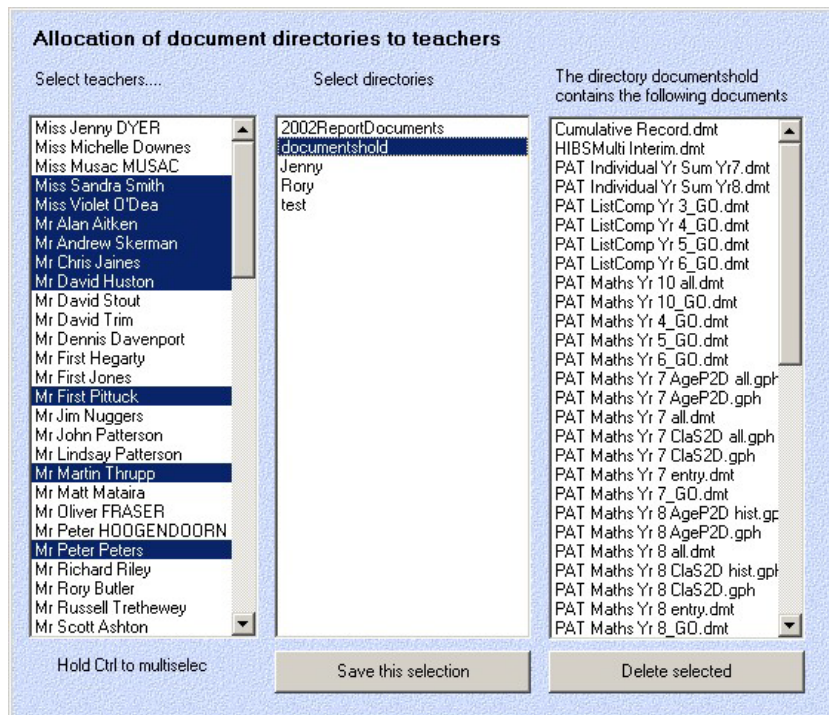


Illustration 27 : Allocating directories to staff members

*Viewing a staff members' directories and documents*

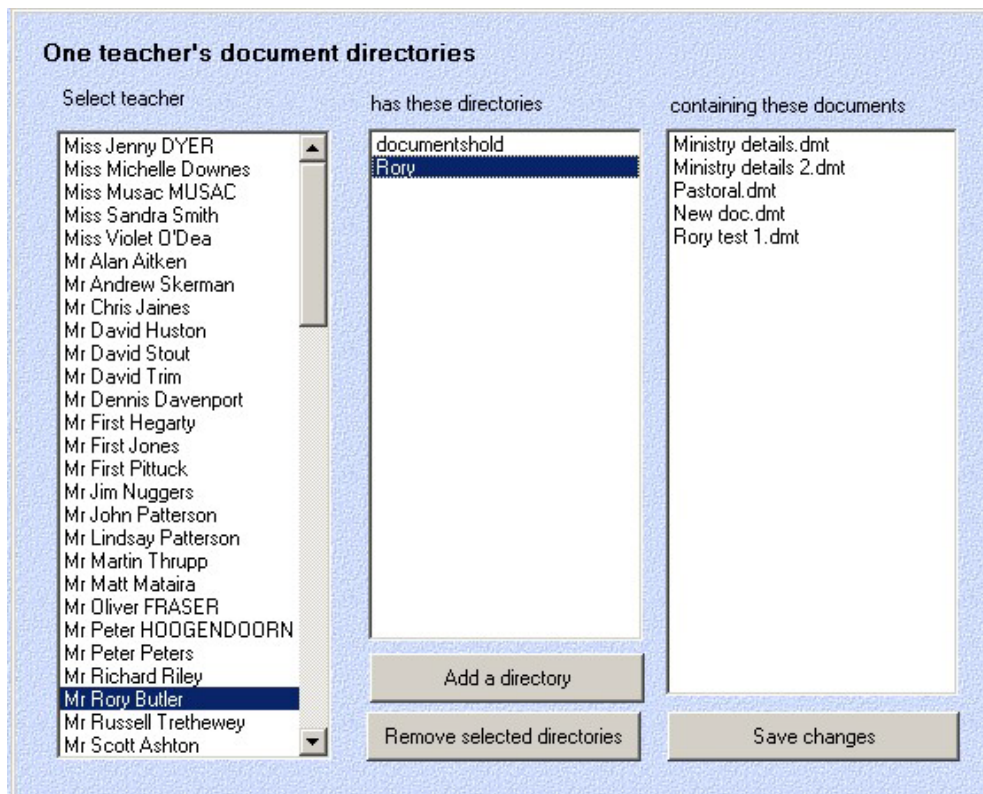


Illustration 28 : Moving documents between directories

Select a staff member from the left hand list and his or her subdirectories will be displayed in the centre list. Select a subdirectory from the centre list and the documents in that subdirectory will be displayed in the right hand list.

Using the buttons at the bottom of the centre column you can:

Add a directory (to the selected staff member)

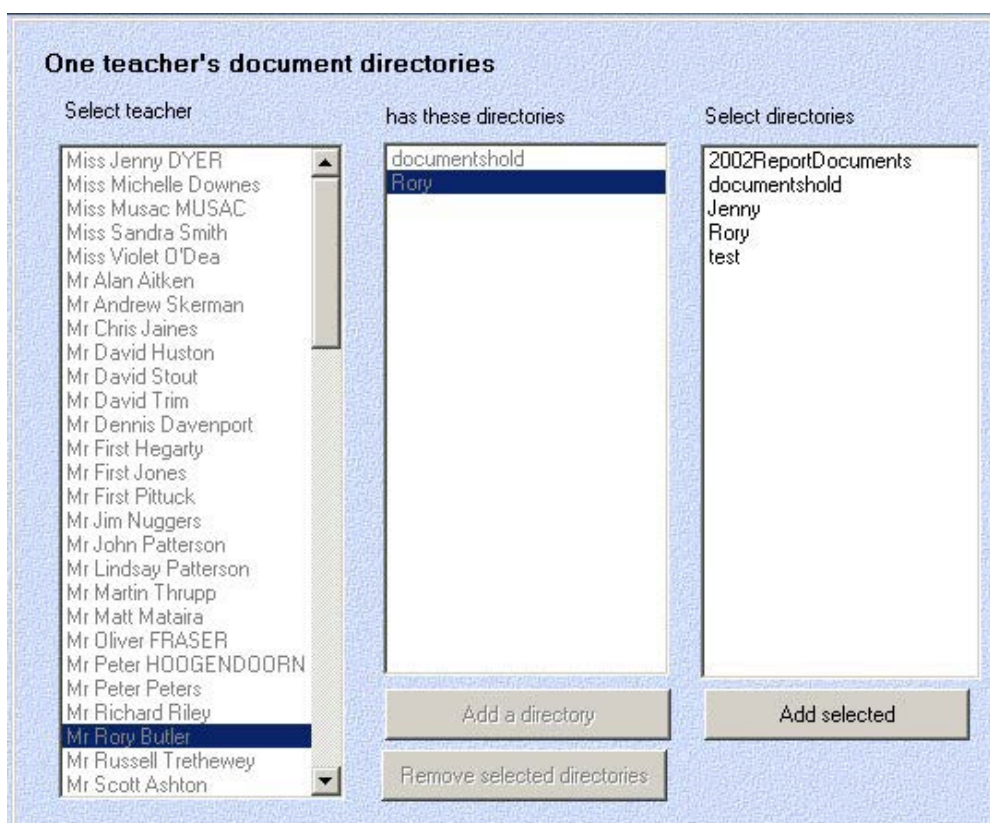


Illustration 29 : Moving documents

The list on the right will change to display the available directories from whence you may select one or more, then click on the 'Save changes' button.

2. Remove selected directories - by selecting them then clicking on the 'Remove selected directories' button.

### *Allocating basic documents to staff*

Staff need to see student data, and they can either select their own documents (if they have the necessary right) via the student data editing screen, or you can allocate them specific documents via this process.

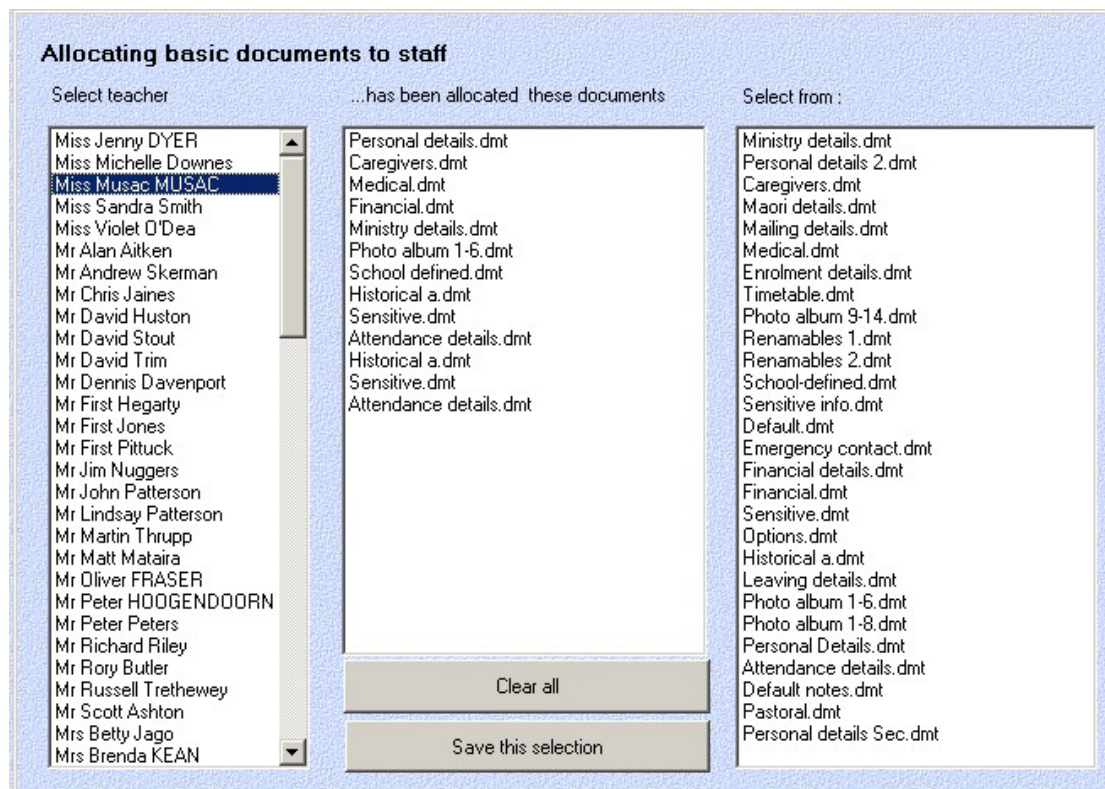


Illustration 30 : Selecting staff members

Select the member of staff with whom you are concerned from the list of the left. His or her documents will be displayed in the centre column. You can then add (or subtract) from this list by selecting (or re-selecting) from the right hand list. Click 'Save changes' when you are ready to save changes.

### Updating basic documents

From time to time MUSAC may release more basic documents, we may alter original basic documents, or you may, yourself alter basic documents. The status of each document is displayed in the right hand column and some may have a red, green or blue dot against them indicating the status shown at the bottom of the screen.

In the example below you can see that I have created several user-defined documents. It would be a good idea for me to delete these, by selecting them then clicking on the bottom button.

At the top of the screen, in the green area, I can see that I am currently viewing in 1024 x 768 screen resolution, and hence addressing a particular group of documents. If I click on the 'View 800 x 600' button then the documents relating to that screen resolution will be displayed and I can 'manage' them.



Documents are available for two different screen resolutions  
Current display : 1024 x 768

Document name	Status	Modified	Original	
Alumni details.dmt	MUSAC standard	14/09/2004	14/09/2004	
Attendance details.dmt	User defined	05/11/2008		
Caregivers.dmt	MUSAC standard	28/08/2002	28/08/2002	
Emergency contact.dmt	MUSAC standard	15/09/2003	15/09/2003	
Enrolment details.dmt	MUSAC standard	03/03/2008	19/05/2010	●
Financial details.dmt	MUSAC standard	16/01/2006	16/01/2006	
Financial.dmt	MUSAC standard	23/05/2003	23/05/2003	
Leaving details.dmt	MUSAC standard	25/11/2009	25/11/2009	
Mailing details.dmt	MUSAC standard	25/09/2008	25/09/2008	
Medical.dmt	MUSAC standard	15/09/2008	15/09/2008	
Ministry details 2.dmt	MUSAC standard	25/11/2009	06/10/2010	●
Ministry details.dmt	MUSAC standard	18/09/2009	06/10/2010	●
Options.dmt	MUSAC standard	08/04/2002	08/04/2002	
Pastoral.dmt	MUSAC standard	16/10/2002	16/10/2002	
Personal details 2.dmt	MUSAC standard	03/10/2008	03/10/2008	
Personal details.dmt	MUSAC standard	19/10/2009	17/05/2010	●
Renamables 1.dmt	MUSAC standard	18/11/2002	18/11/2002	
Renamables 2.dmt	MUSAC standard	18/11/2002	18/11/2002	
School-defined.dmt	MUSAC standard	20/08/2002	20/08/2002	

Key

- Standard documents modified by a user
- Standard documents updated by MUSAC
- New standard documents supplied by MUSAC

Buttons on the right:

- Restore all Standard Documents
- Restore Selected Documents
- Import all New Documents
- Import Selected New Documents
- Delete Selected User-defined Documents

Illustration 31 : The document status screen

## 15 Utilities

### 15.1 An overview of Utilities

The Utilities button provides access to a number of functions related to the package. These are accessed via a screen full of buttons.

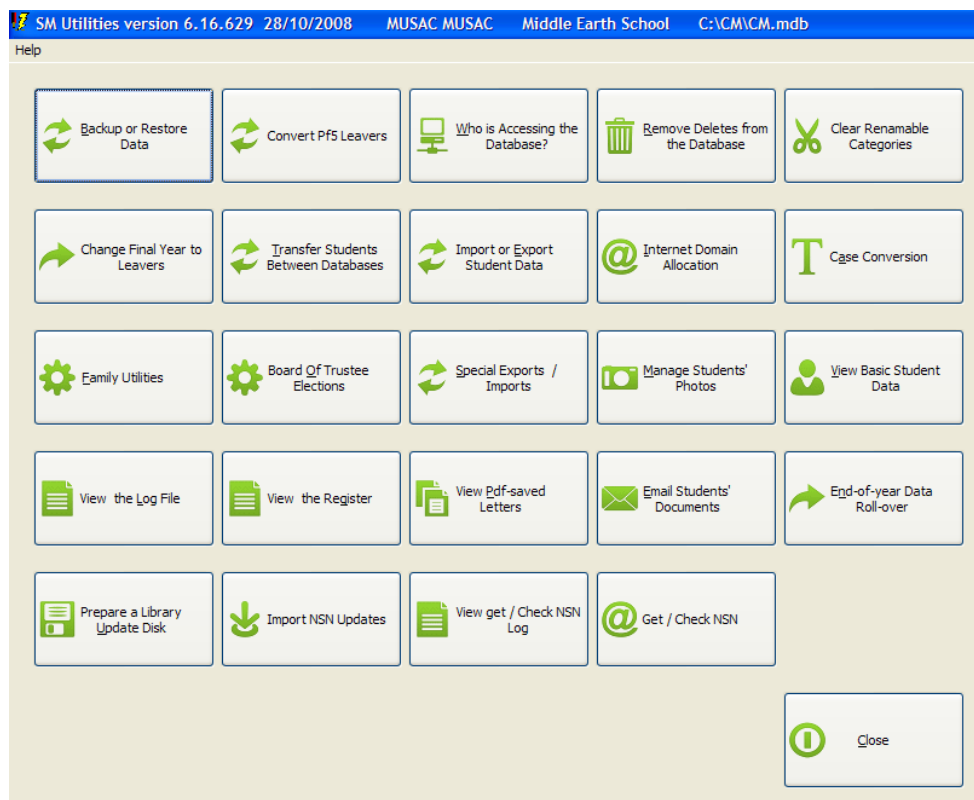


Illustration 2 : The utilities screen

### 15.2 Backing up or Restoring data

This process is detailed in full in Appendix 1 which is devoted to the topic.

In addition MUSAC has developed a utility 'AutoJeCT Compacting Tool', more information can be found on our website [www.musac.co.nz](http://www.musac.co.nz).

### 15.3 Who is accessing the database?

Each time a person enters the program this is recorded in an 'audit trail' log, as is their use of each of the various functions of the package.

In addition to this, each time a database is opened during the use of the package, this information is also recorded, this time in a temporary file. When they close the database their name is removed from the file.

You can, at any time, see who is using the various databases using this utility, which displays their name, their computer, and the database in question on the screen, an example of which is shown below.

**Who is accessing the database?**

The current computers on your network are currently accessing the Classroom Manager/Student Manager databases. N.B. Column widths may be adjusted by sliding their joins

Computer	Login Name	User name	Program	Date In	Time In	Duration
V...	A782f	Musac MUSAC	Shell	28/05/2009	12:13	101 mins
V...	A782f	Musac MUSAC	SM Utilities	28/05/2009	12:14	100 mins
V...	A782f	Musac MUSAC	Student Manager	28/05/2009	12:14	100 mins

Pause List Generation (To Allow Viewing)    Print this List

**Send a message to all current users of Classroom Manager and Student Manager**  
Please type in your message below.    Cause automatic shutdown  After  seconds.    Send Message

**You are no doubt aware that people may be designing documents or doing print runs and would naturally object strongly to being closed down! Please use this process in an emergency only!**

Alternatively you can have your message displayed and have people locked out of CMTeacher and CMAdmin until YOU return here to release the message. Others attempting to enter either will be denied access.

Click here to Lock Everyone out Until you Return here to Release the Lock. Access to CMTeacher or CMAdmin will be Denied Until Then.    Release Lock

Illustration 11 : The 'Who is accessing' screen

The top half of the screen is devoted to a table listing those people currently accessing any of the databases. This screen is refreshed every five seconds so, if you are scrolling down viewing the list then, every five seconds it will be redisplayed from the top down. To have the constant refreshing paused while you are scrolling, click the first button below the screen titled 'Pause list generation'.

The list includes the following information :

- The computer name where the user is working
- Their login ID
- Their name
- The name of the database currently open
- The date
- The time

Periodically you may need ALL users OFF the system. Do not install an updated version of the program while others are using the software. Type a message in to the window 'send it' to all users. This records your message in a temporary file and each of the programs is constantly checking to see if a message has been recorded. If so, the message is displayed on their screen.

You can also tick the check box which allows you to cause an automatic exit from the program on other computers. The minimum time which a message to this effect can be displayed before the shutdown occurs is 150 seconds. After this time, if a particular user has not exited from the package then the databases will be closed and the program halted. You can watch progress on the window at the top of the screen, which is refreshed every five seconds.

Please take note of the message at the bottom of the screen!

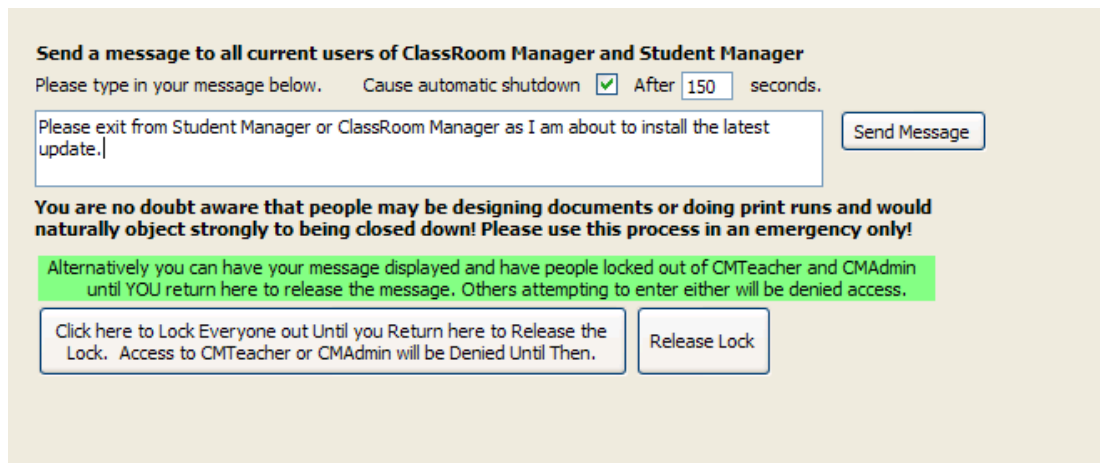


Illustration 12 : A message ready to be sent

A further example of a message about to be sent is shown below.

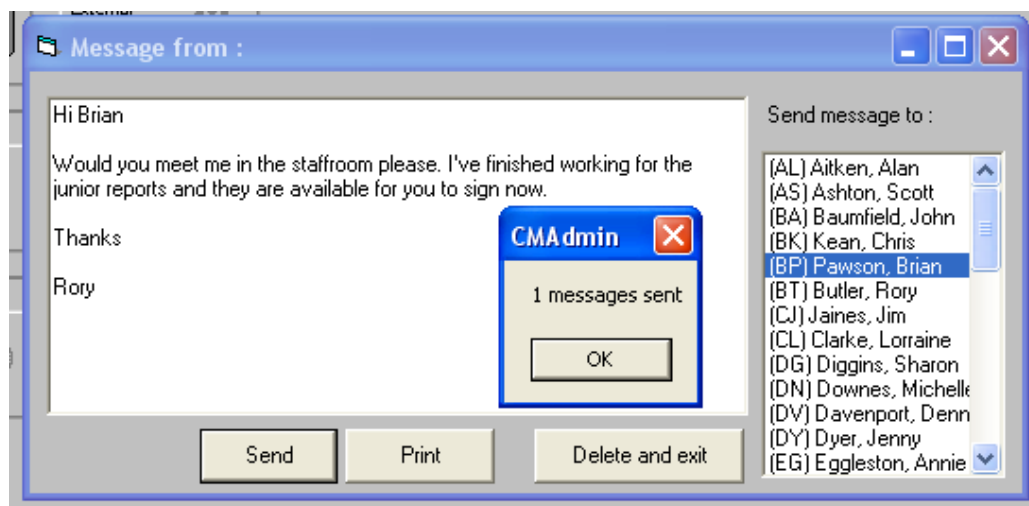


Illustration 13 : A message sent

On this screen I have prepared a message to Brian, then I've selected him from the list of staff members on the right hand side. You can select more than one recipient by holding down Ctrl while you select. Finally, I clicked 'Send' and the small message '1 messages sent' appears.

Over on Brian's machine he is busy working away and the following window will appear on his screen.



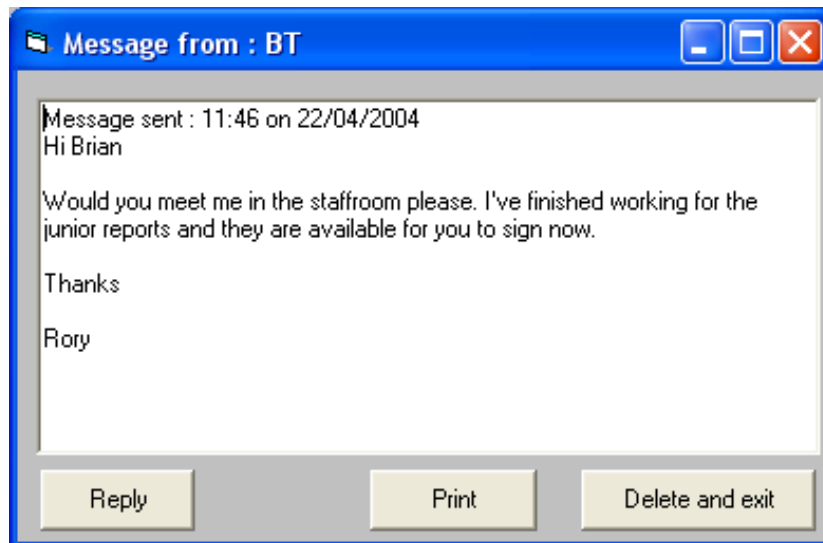


Illustration 14 : A message received

He can immediately reply, he can print the message and he can delete it.

#### 15.4 Removing deleted students from the database

Most students are moved out of the database as they become leavers, and are eventually transferred to the leaver file. There will be some however who, for one reason or another, have their status set to 'Delete'. (Perhaps, for example, you have accidentally entered a new student twice.) In this case, use the button above to arrive at the screen below, which lists the names of all students whose status is 'Delete'.



Illustration 15 : Three students to be deleted

When you are ready to proceed, click on the button shown, and the message below will eventually be displayed, suggesting that you might wish to visit the database compression utility to regain the space once occupied by the data relating to the deleted students.

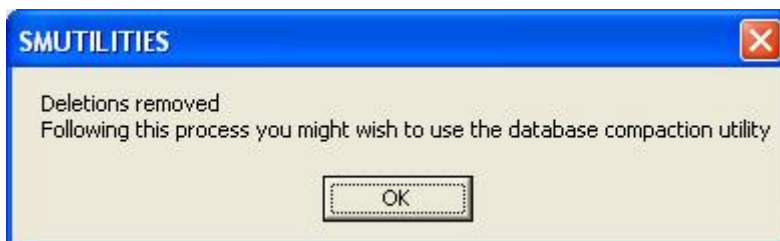


Illustration 16 : A post-deletion suggestion

## 15.5 Changing the final year to leavers

At some stage, probably late in the year, you might wish to globally change the status of all of your final year students to 'Leaver'. From the Utilities menu click 'Change final year to leavers'. This utility does that with one button click.

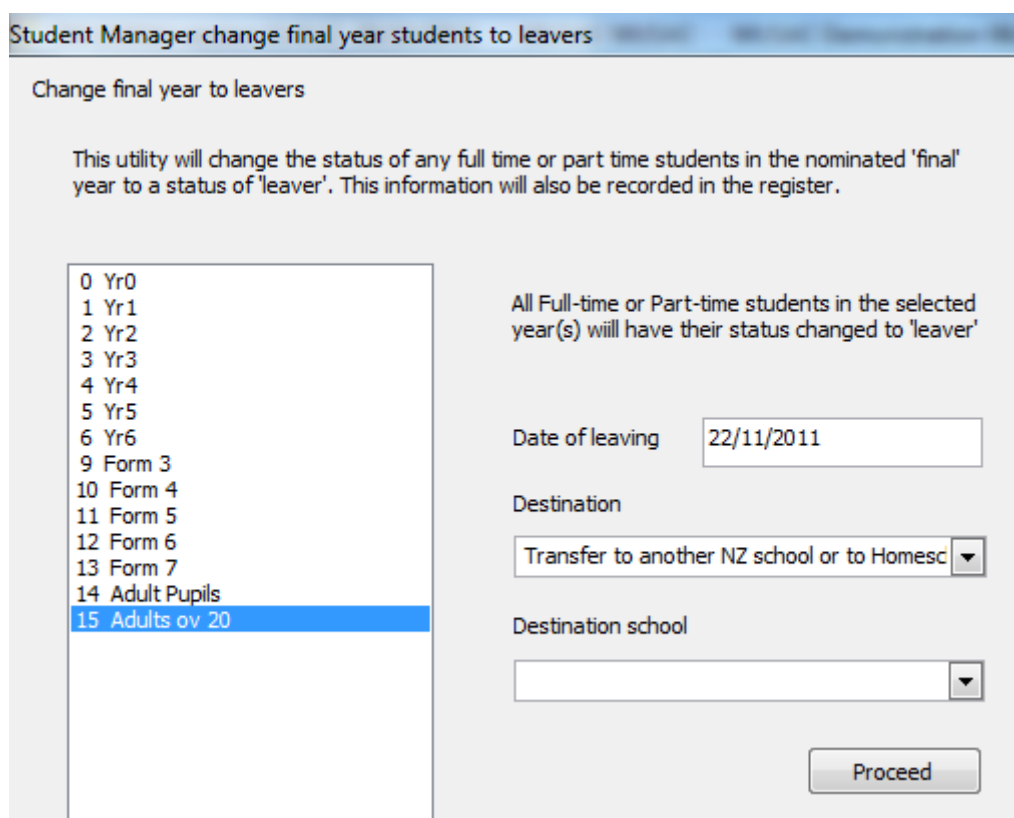


Illustration 1 : Selecting the final year

Select the 'Final year' from the list on the left hand side of the screen. Secondary schools must also provide other information used for Ministry of Education returns. They must also select a default setting for each of ;

Date of leaving

Destination - selected from the Ministry's list of possibilities.

Following the use of this process you should return to the main menu, filter just 'final year leavers' and proceed to 'Edit Student data' - in order to check that the leaving data on the Ministry of Education screen is accurate.

## 15.6 Transferring students between databases

At some stage early in the year, AFTER your March returns, you should transfer your leavers to their leavers databases.

**Please note:** if you are wishing to retain all leavers in your database, for the purpose of long term comparison between current students and those present in earlier years then you may wish to NOT transfer your leavers. Of course this does increase the size of your database.

This utility may be used to move student between files, including the transferral of leavers BACK into the main database, should you wish.

This is the process used for the purpose of this demonstration.

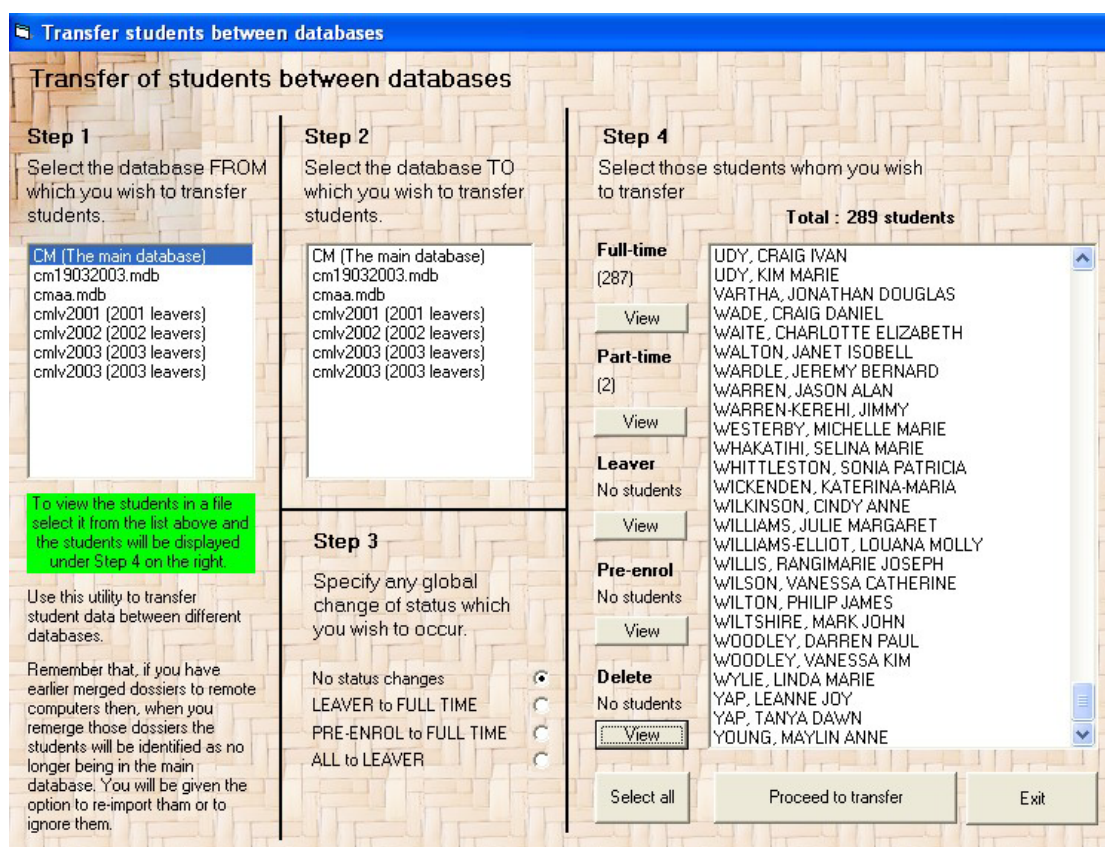


Illustration 2 : The transfer screen

Initially, the screen will appear as shown above, with your main (CM) database selected as the FROM database. The students therein are displayed on the right hand side of the screen. You can display those of a particular status by clicking the button relating to the required status. The number of students with each status is displayed above each of the five buttons.

However, to transfer some students from a leavers database back into the main database...

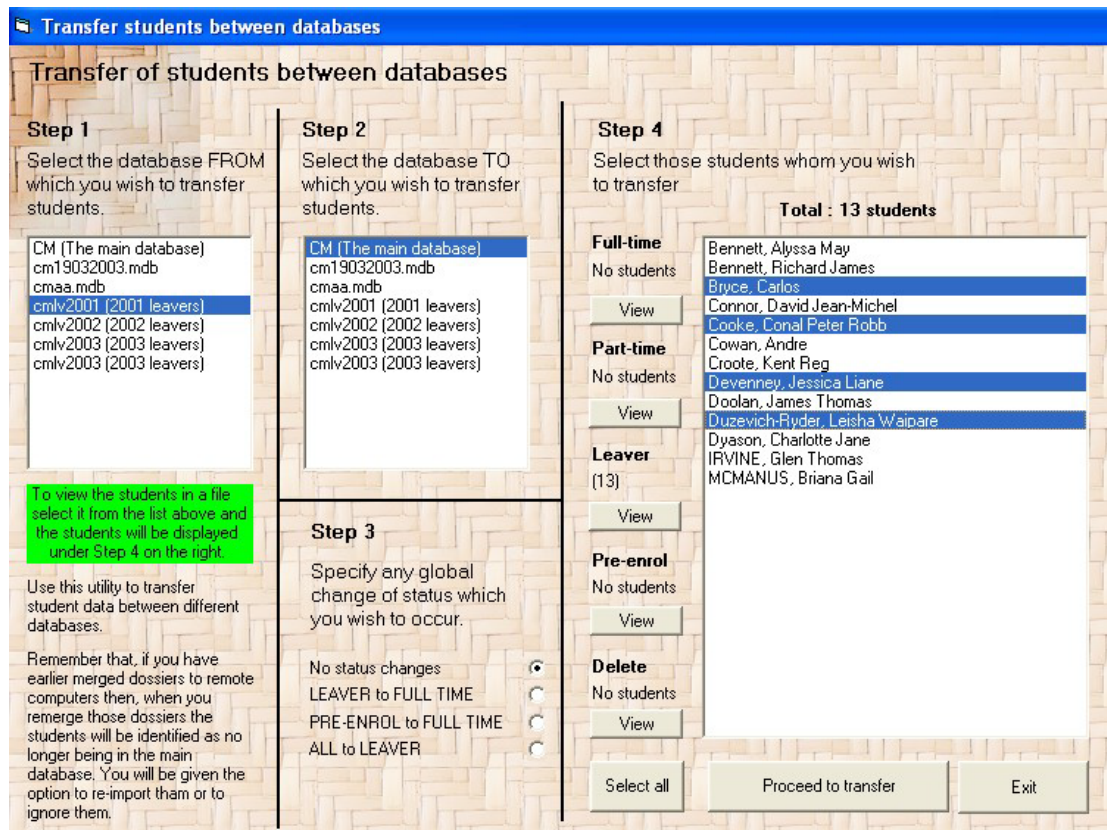


Illustration 3 : Selection of students for transfer

- 1 Select the leavers file from the left hand list - the FROM database.
- 2 Select the Main database from the list in the centre - the TO database.
- 3 Select those students whom you wish to transfer from the list on the right hand side of the screen.
- 4 Click 'Proceed to transfer'

The following screen will report progress...



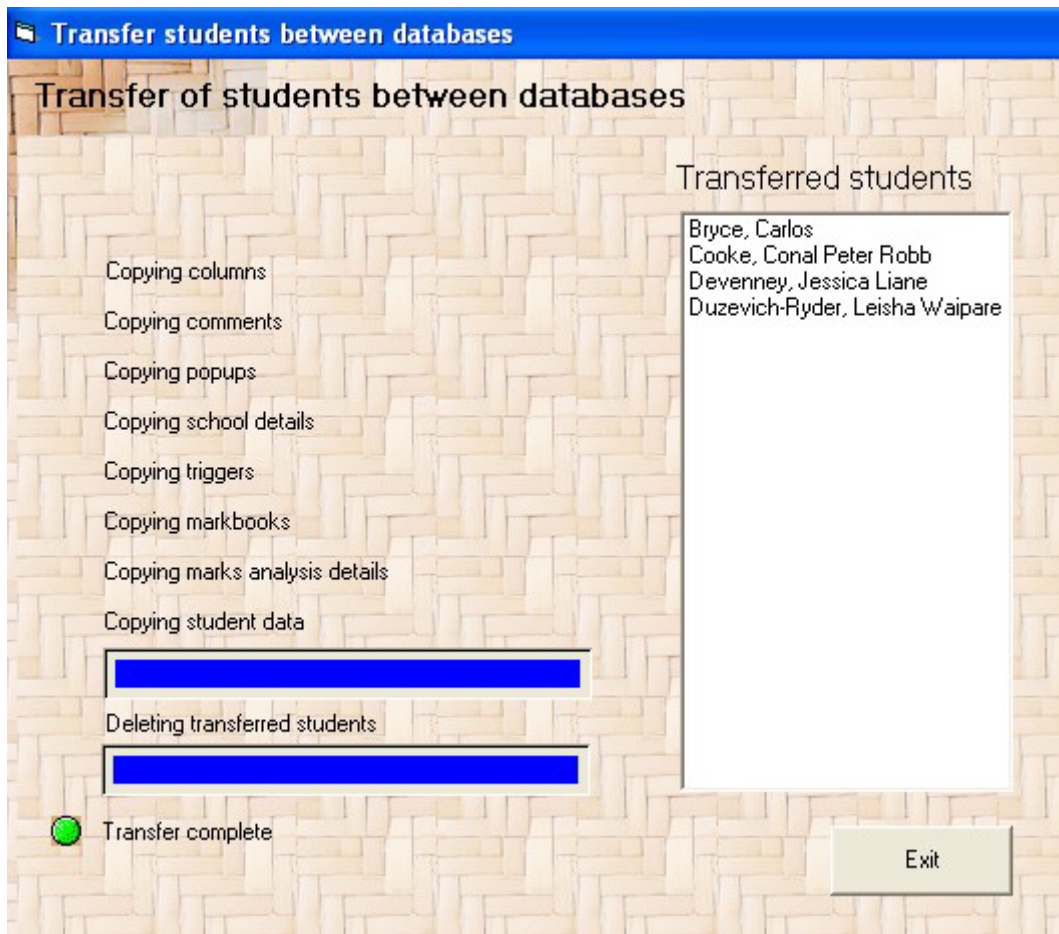


Illustration 4 : The transferral process

... and may well appear as shown above at its completion.

**Please note:** the screen above includes processes such as 'Copying columns....'. These processes will only occur when you are copying FROM the main database. It is clearly not desirable for columns, and other configuration details, to be copied on to your main database from some other obsolete one.

## 15.7 Importing or exporting student data

The Import / Export routine allows you to

- export student data in a simple text file format and
- import data which has been exported in the same format from another school's database
- export selected data from select students in one of three formats.

The main screen offers you the choices:

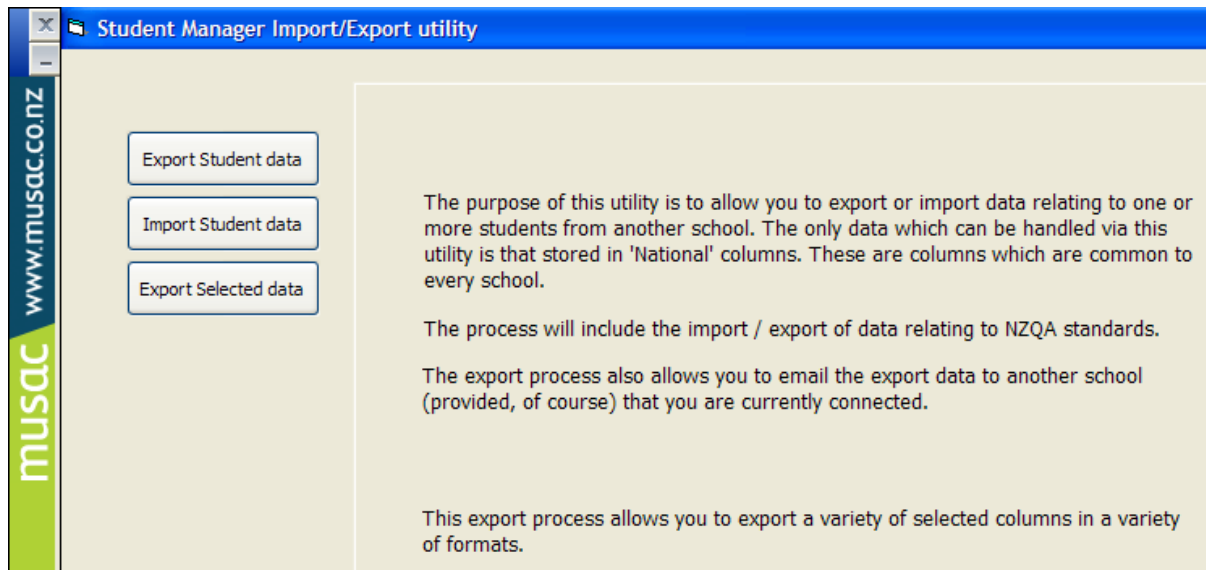


Illustration 5 : The import/export buttons

### Exporting student data

This routine exports ALL standard column data for the selected students. The screen is as shown below, where I have already selected six students' data to export. I have selected drive A: as my export destination and I have NOT selected the option to 'Leave the file in the current directory ready for emailing' to another school. I have also elected to NOT have these selected students' removed from my database.

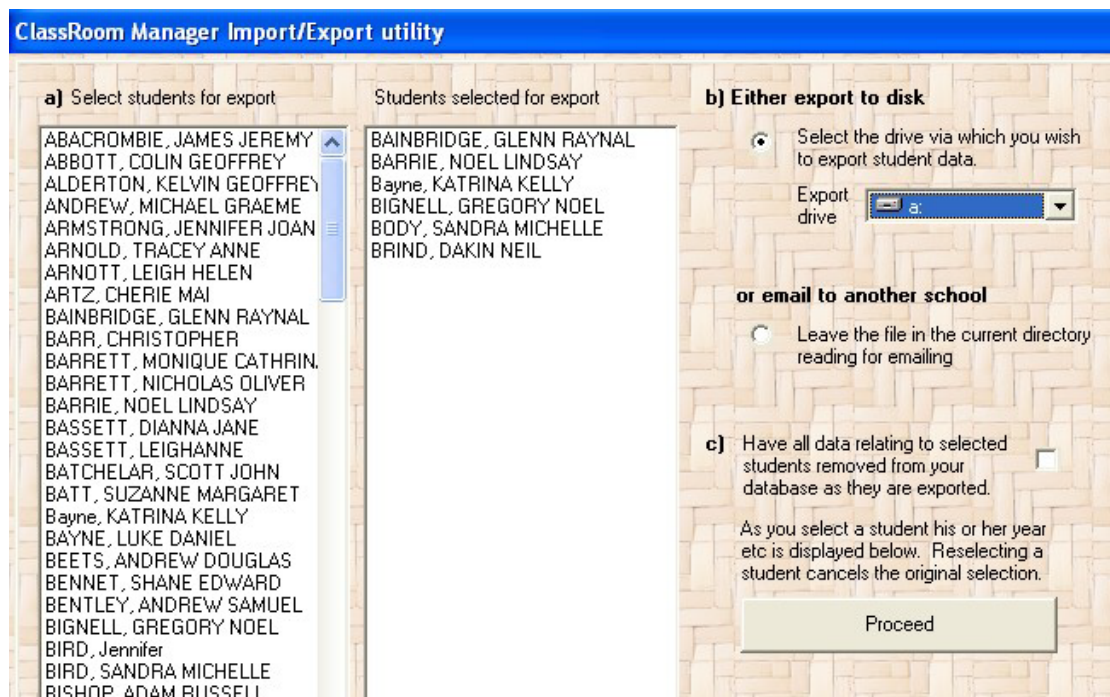


Illustration 6 : The export screen

After 'Proceed'ing, the following message was received.

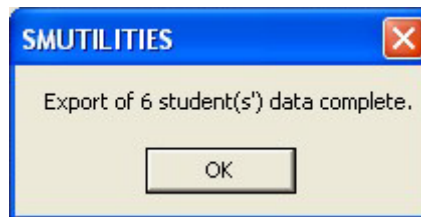


Illustration 7 : Process complete

My A: drive contained a file entitled 'CMImpExp.txt', the contents of which appears as shown. This format lists my school's name, the actual date, and the contents of the various national columns for each of the students. eg. 1#Bainbridge represents the contents of columns 1 - the family name.

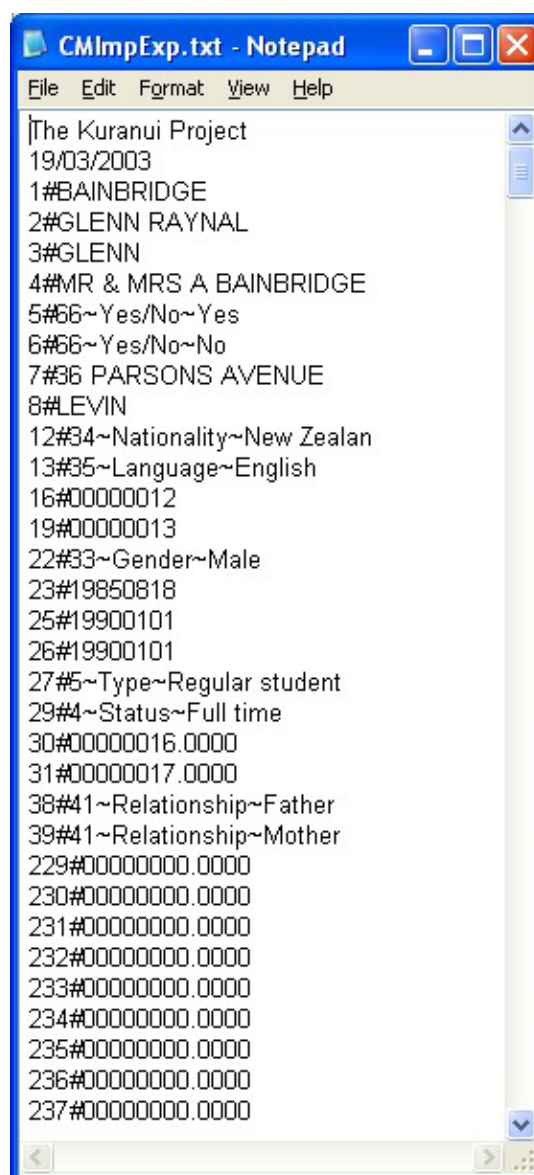


Illustration 8 : A portion of an export file

### *The Import Process*

This is the reverse process, the screen for which is shown below.

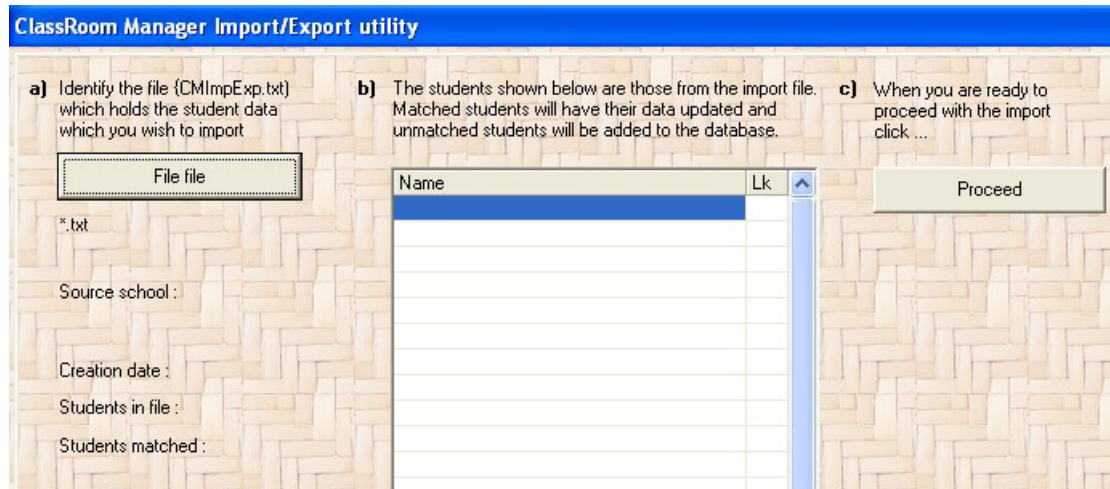


Illustration 9 : The import process

When I click on the 'Find file' button the following dialogue enables me to find my CMImpExp.txt file.

After clicking 'Open', the names of the students on the file are listed, and the program attempts to match the names with students already in my database. If matches are found then a small chain link will be displayed against their name. If NOT matched then there will be a missing link in the chain and their data will be imported and they will be allocated a new 'hidden code number' within the database.

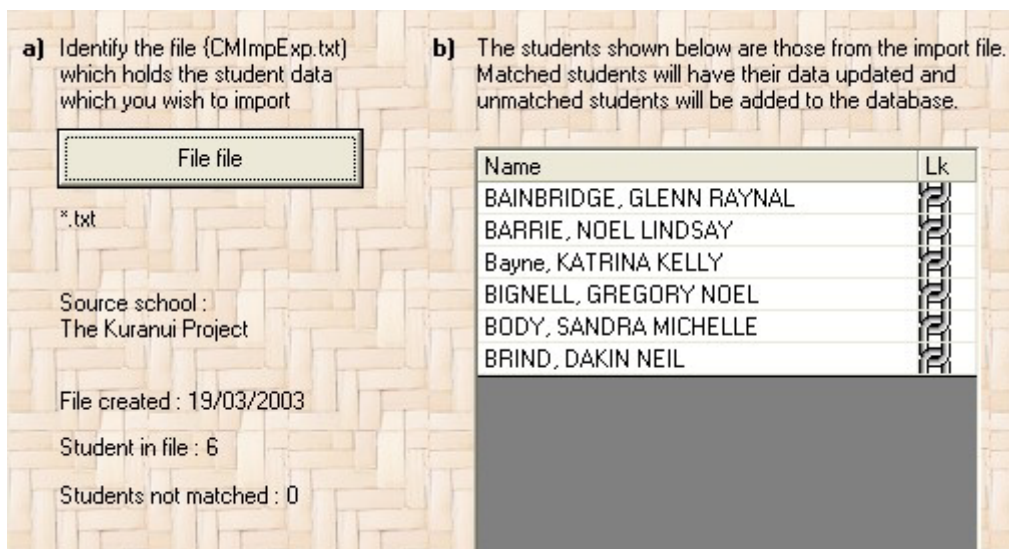


Illustration 11 : Recognised students

Naturally, having just exported them, the names match perfectly, and I am able to proceed, importing their data back into the database.

*Export of selected data*



## Student Manager MUSAC Classic 2014

This process is the most useful of all if you are wishing to export data for a purpose other than to another school. It allows you to design export profiles then to return later, select a profile, and reapply it to a different bunch of students. You can, of course, simply design and use a profile without saving it for later reuse. The first step of the process is shown below. These pages are taken from the Classroom Manager guide where the same utility is available in CM Admin.

Illustration 12 : The general export screen – step 1

The left hand list displays any previously designed profiles, from which you can select a profile for reuse. In this case, however, there is no previously designed profile, so we shall design a simply one of our own.

At the top of the screen is a pink title bar which, if you click on it, drops down an instant help screen. To hide this screen click on the pink bar at the bottom labelled 'Hide help'.

Illustration 13 : The instant 'help' screen

To design an export profile of your own :

Give it a name at the bottom left of the screen

Specify the columns which you wish to export. You can do this in two ways.

- a. Select one of the global export options from the popup at the top of the centre column
- b. And/or select individual columns from the column picking tool at the bottom of the centre column.
- c. You can also select 'derived' information. This is information which is not stored in columns but is derived from it. Eg. Current age in yy.mm.dd format or their 'Time at this school' in the same format. This process uses the 'code insertion' tool used in the word processing behind the {a} button. This tool is explained fully in an appendix to this manual. An example of a 'code insertion' tab is shown below.

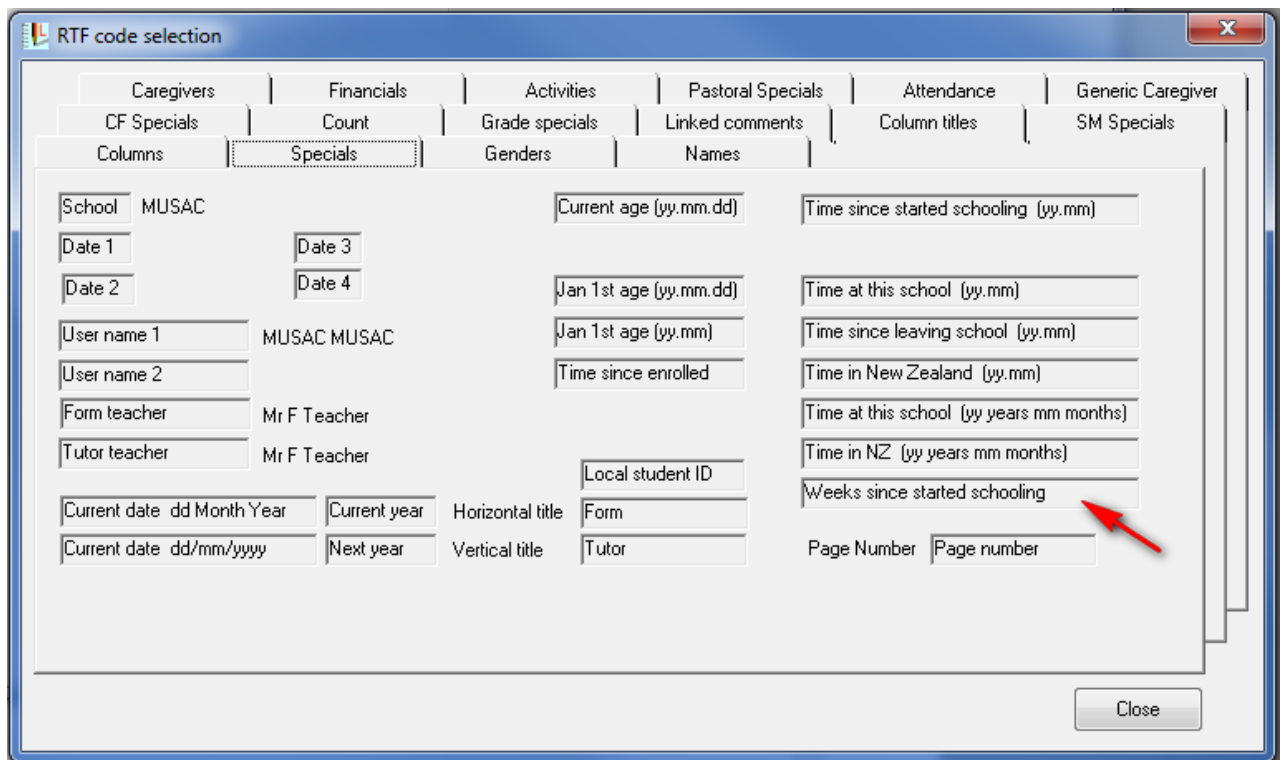


Illustration 14 : Select of derived information

From the Printing selections, there is an option to include the Page Number on the printed output below the 'Weeks since started schooling' field.

In the example below, I selected 'All national CM columns' from the popup menu.

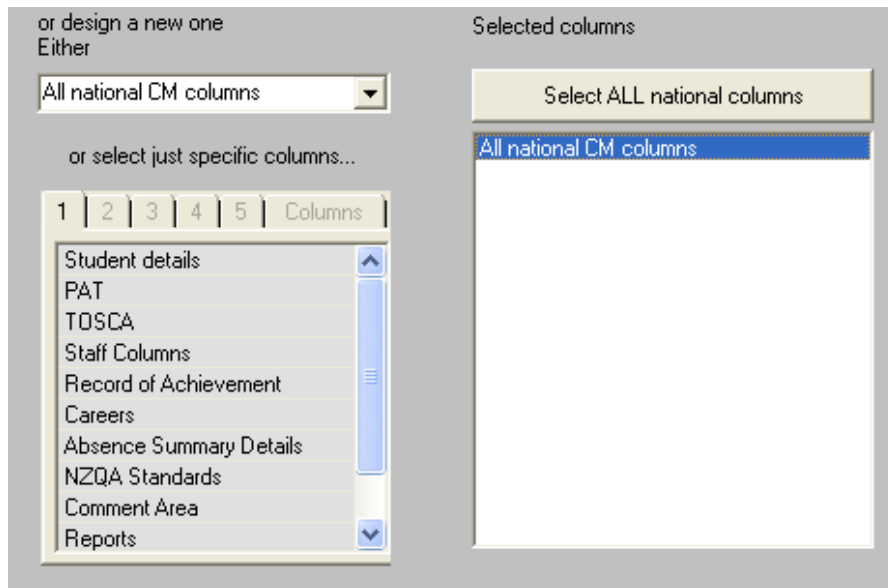


Illustration 15 : Selection of 'All CM national columns'

The other alternatives in the popup menu are shown below. These allow me, with a single click, to select ALL national columns from CM, from SM or from both.

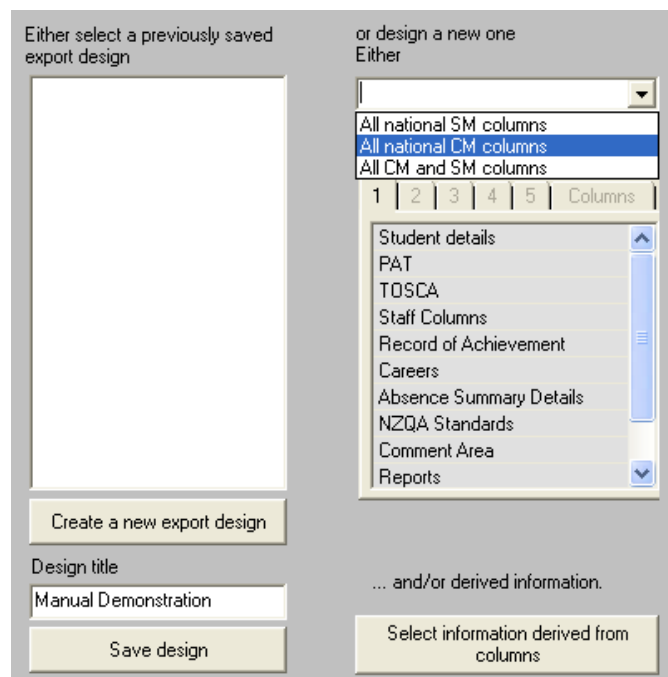


Illustration 16 : The selection possibilities

Once I 'Save design', my new profile will be added to the list of available profiles. Click 'Proceed to final steps' and the following screen dealing with the final three steps is displayed.

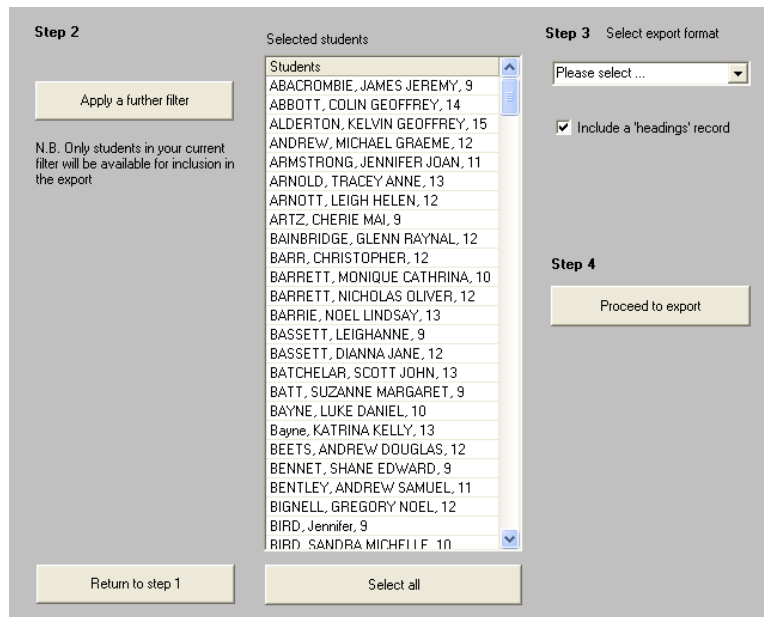


Illustration 17 : The second screen – the final steps

This is where we select the students and the export format. Initially all students are displayed for selection. The first column allows you to apply a further filter to these, using the student selection tool (See the relevant appendix for full details).

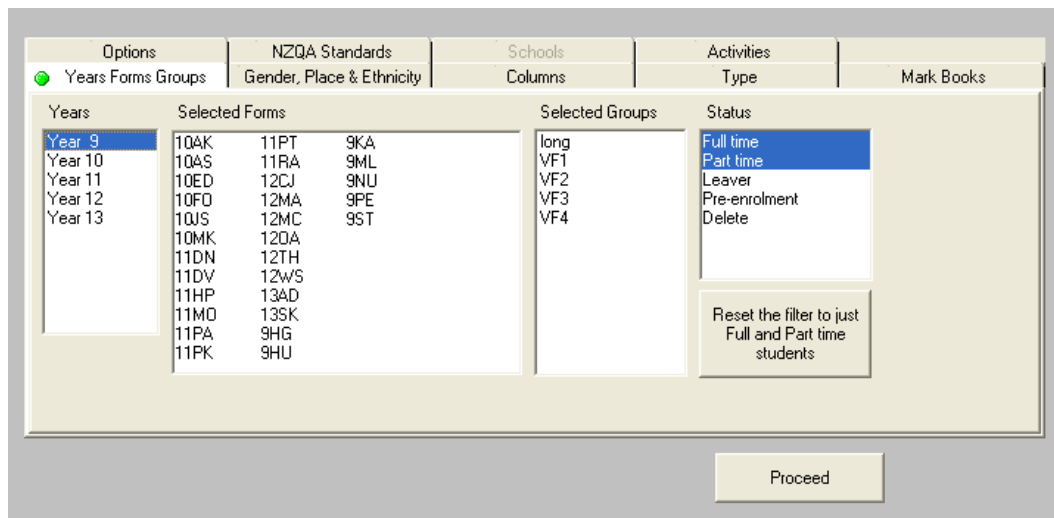


Illustration 18 : The 'Extra filter' process

Once you have applied your filter the resulting students will be displayed....

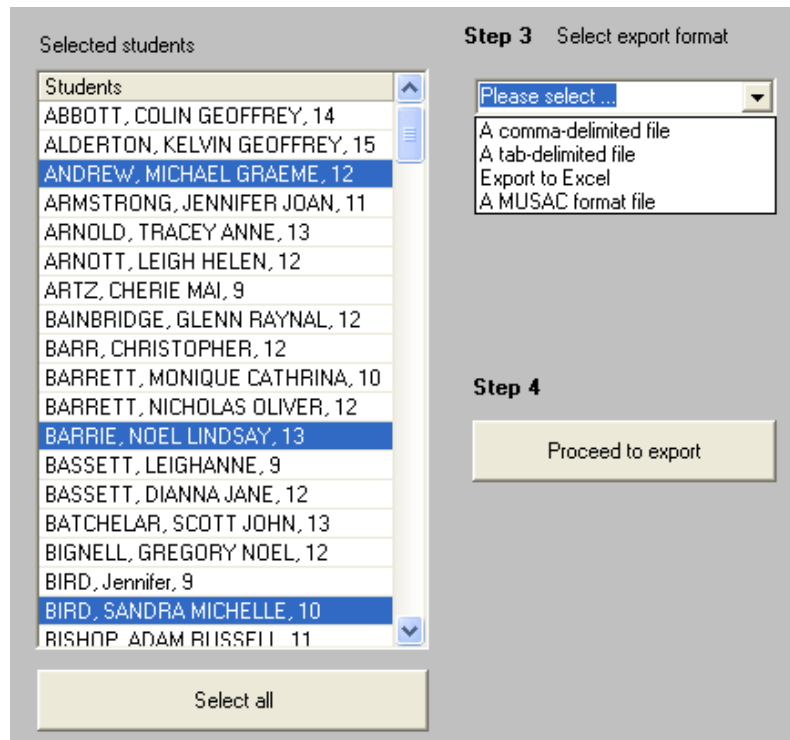


Illustration 19 : Selection of students and export format

... from which you can either 'Select all' or, by clicking on the list, individuals.

Then, in step 3, you select the export format you wish to use. These are listed in the illustration above.

- A comma-delimited file
- A tab-delimited file
- Export to Excel
- A MUSAC format file
- XML format file

I have selected the MUSAC format for this demonstration. If you had selected the 'Excel' option then, at the conclusion of the export process you would find yourself in Excel with your data displayed.

Finally, when you click on 'Proceed to export' the following dialogue, if necessary, will appear.

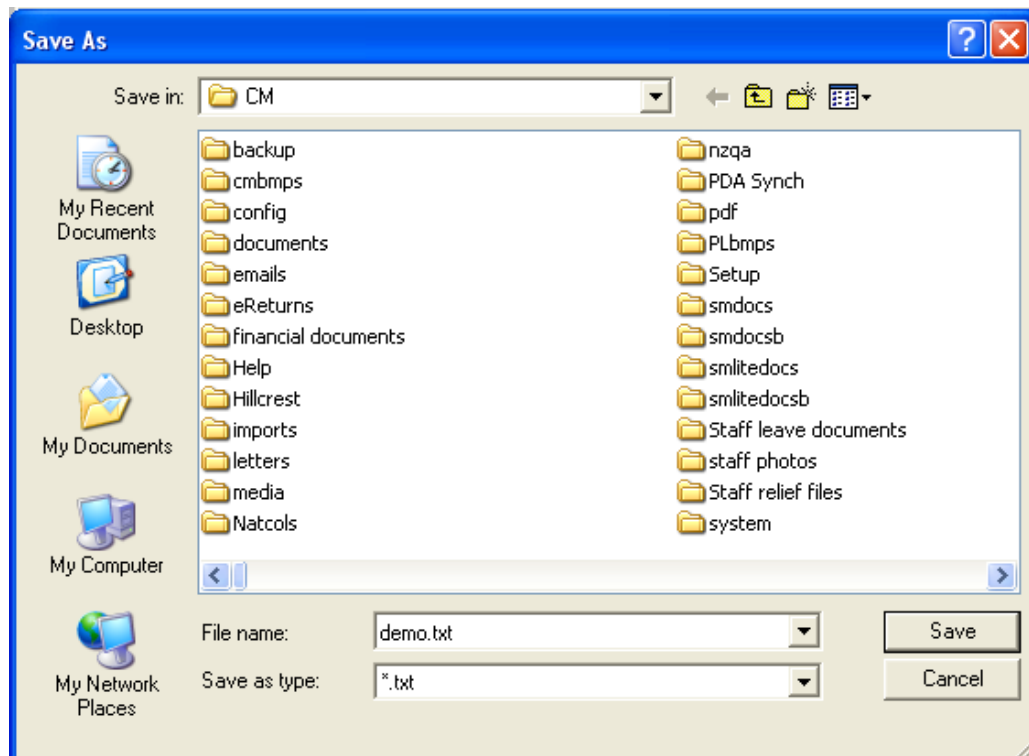


Illustration 20 : The export file path and name

At the conclusion of the export process the Step 4 area will appear as shown below.

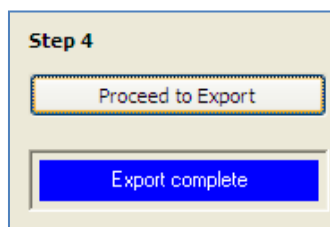


Illustration 21 : The conclusion of the export process

Export files have a 'first record' which consists of the column headings. Two portions of an example using the 'MUSAC' format are shown below.

The MUSAC format = headings information

- 1,Familyname
- 2,First names
- 3,Preferred name
- 16,Year
- 17,Form
- 18,Group
- 22,Gender
- 23,Date of birth
- 29,Status
- 244,Ethnicity
- 1062,Date Sat ListComp Yr8
- 1063,Age at Test ListComp Yr8
- 1064,Raw Score ListComp Yr8
- 1065,Level Score ListComp Yr8
- 1066,Class Percentile ListComp Yr8

## The MUSAC format – student information

1,BENNET  
 2,SHANE EDWARD  
 3,SHANE  
 16,9  
 17,9ST  
 22,Male  
 23,9/09/1988  
 29,Full time  
 244,NZ European/Pakeha  
 1320,12/08/1999  
 1321,12.11  
 1322,24  
 1323,32  
 1324,60  
 1325,70  
 1338,5  
 1339,6  
 99001,9MUOA  
 99002,9HOJS  
 100001,9MUOA  
 100002,9HOJS  
 101001,9MUOA

The following example shows how to export data to Excel.

The following steps have been taken, in readiness for the export.

The 'Column picking tool' has been used to select those columns which we wish to export. The first two, family name and First names, were already selected as we suspect that they should form part of any export.

We could have also clicked on the button at the bottom of the first column. This allows us to export 'derived' information - such as the students' current debts, their 'Third caregiver's' phone number etc.

- 3 In step 2, just year 9 students have been selected for export.
- 4 In Step 3 we select 'Export to Excel'. When selected, the following dialogue appears allowing us to name the file and its destination - in this case 'Myexport.csv' on drive A:

In the screen below, click 'Proceed to export' and the process is nearly completed.

Afterwards, checking drive A: , you will find the export file, a small sample of which is displayed below. You can see the export data - comma-delimited.

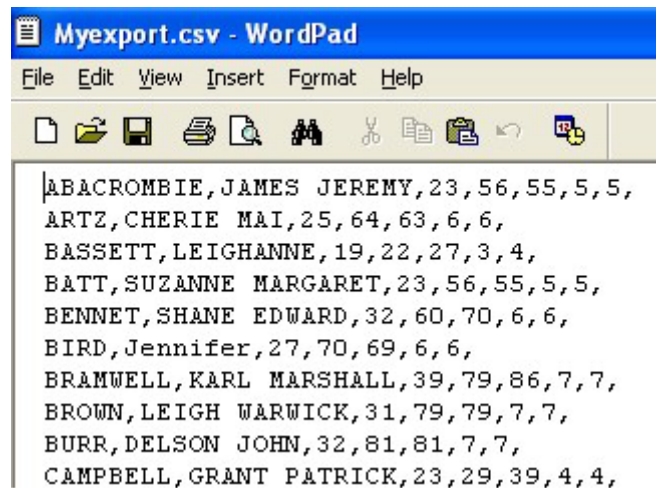


Illustration 24 : The exported data

However, the program automatically opens Excel - where the data is displayed in a spreadsheet.

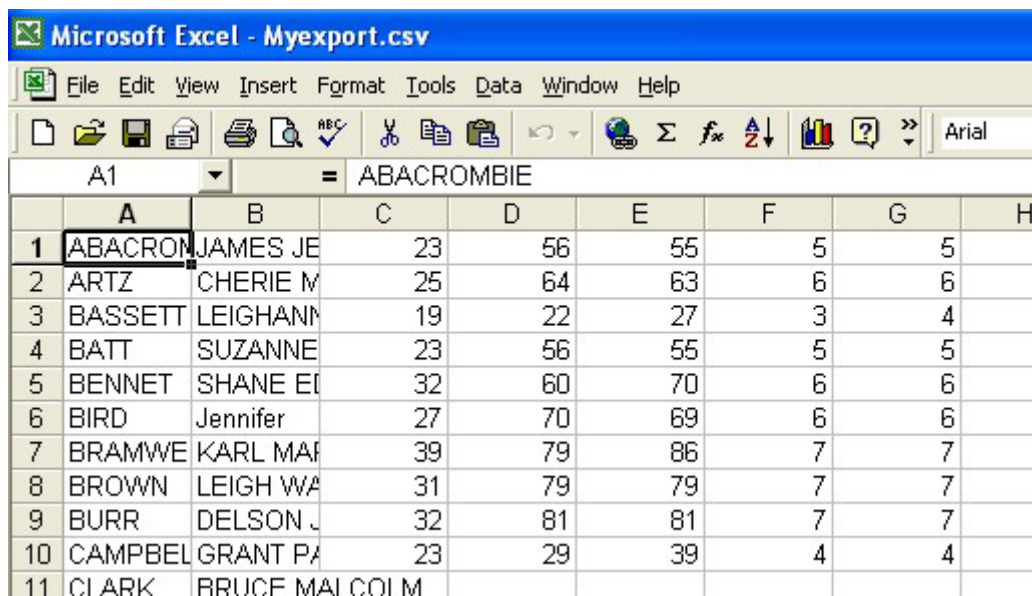


Illustration 25 : The data arrives in Excel.

The very first step is to check to see if any of the leavers are still in your existing main cm/sm database. If so then the message above will be displayed. Click 'OK' and check the list on the right. If you are happy to have these students REMOVED from the CM database and transferred to the leavers file for the selected year, then click on the yellow 'Proceed' button which will appear at the bottom of the screen, shown below.



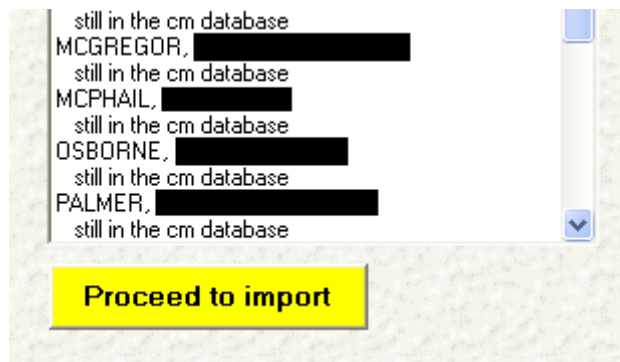


Illustration 29 : The new 'Proceed' button

Should you proceed then the green dot will indicate progress through the various stages of the data conversion routine.

**Please note:** students' options are NOT imported, as it is assumed that you will have already used them in Classroom Manager.

## 15.8 Internet Domain Allocation

What in the world is the INDUCT Process? A couple of years ago, when student's email addresses became all the rage schools asked us to come up with a means of generating student ids for use with their email system. INDUCT stands for Internet Network Domain User Connection Tool.

The main screen is shown below.

This utility is used to generate and store student and staff information relating to their individual network domain user connections. (i.e. the process used to generate web and email identities).

**Step 1 Connection type**  NT connections  Windows 2000 connections

**Step 2 Group being connected**  Students  Staff - under development

**Step 3 User Login**  
Each user must have a unique login code. To ensure that this is possible extra letters will be added to a code if it is found to be not unique. Select the basis on which you wish to have the original code determined.  
First letters of first names + full family name

**Step 4 User password**  
Include the student's enrolment number in the logon   
A randomly determined number will be automatically assigned to each user as their 'pin number'. Select the number of digits to be used for this number.  
4 digits

**Step 5 Group ID**  
Each user must be a member of a group. Select the basis on which this is determined.  
Year  Over-write existing group data

**Step 6 Email domain name**  
Each user's email address will consist of their login name @ domain name. Specify the domain name to be used. (e.g. yourschool.school.nz)

**Step 7 Select student types**  
Unless otherwise requested, only full-time and part-time students will be included in the file.  
Full-time  Part-time  Pre-enrolments

**Step 8 Include printed list**  
Include a printed copy of the details generated

**Step 9 Click 'Generate'**  
Generate  View / Edit Details

Illustration 26 : The 'INDUCT' screen

There are several steps to the process ....

1. Select 'NT connections' no matter what your PC type

2. Select 'Students'
3. The format of the students' ids.

The following choices are offered :

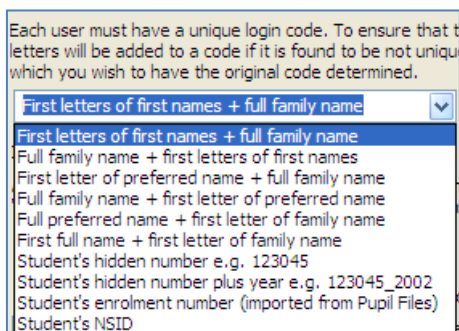


Illustration 27 : The format for the generated logon ids

3. User password. This is a pin number of 4, 5 or 6 digits, automatically generated by the process.
4. Group. The export file (see below) includes a group identifier selected from the list shown.

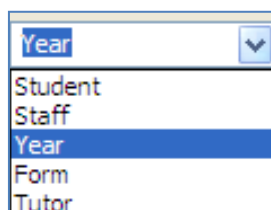


Illustration 27 : Identifies the group

5. Email domain name - an example of which is shown below.

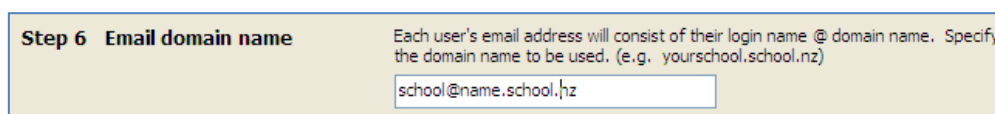


Illustration 28 : a generic email address

6. Student types - full time and or part time.
7. On pressing 'Proceed' you will be asked to identify the name and destination of the csv file mentioned earlier.

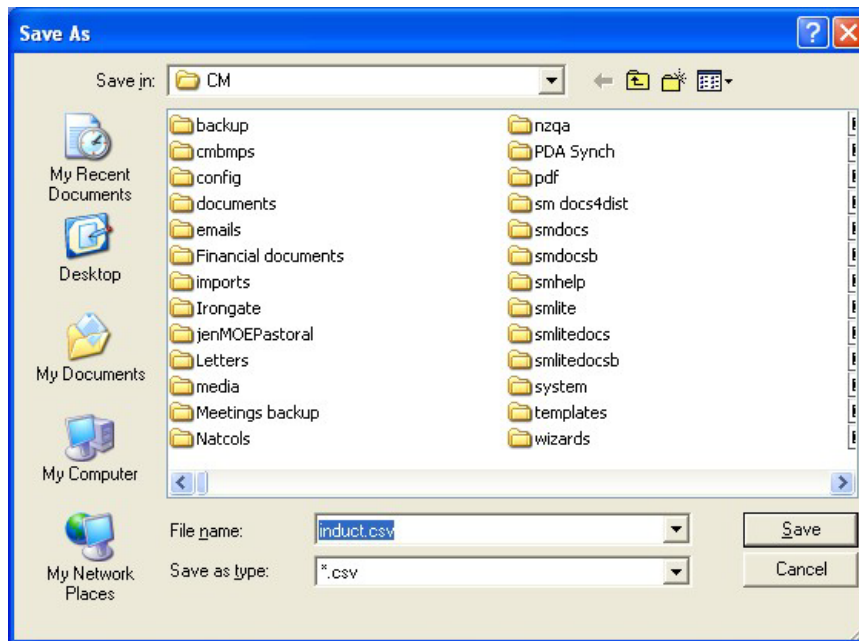


Illustration 29 : Identifying the name and location of the output file

During the generation of the unique ids, each student's id is checked against those already allocated to other students. If a clash is found then the final letter of the id is incremented, until a unique one is found. If that fails, then the program moves on to the next format (see format list in step 3 above) just for this student. The process continues until a unique id is generated.

The following display is the result of viewing the exported file in Excel. You will see the id, the pin number, the student's name, their group, and their email address. This information is stored in the main database under the heading of INDUCT columns and you may retrieve it from these columns to appear in documents.

Microsoft Excel - induct.csv							
File Edit View Insert Format Tools Data Window Help							
A1 = jjabacrombie							
	A	B	C	D	E	F	G
1	jjabacrombie	7350	JAMES JE	Year 9	jjabacrombie@kairakau.school.nz		
2	cgabbott	5801	COLIN GE	Year 14	cgabbott@kairakau.school.nz		
3	kgalderton	6216	KELVIN G	Year 11	kgalderton@kairakau.school.nz		
4	mgandrew	3606	MICHAEL	Year 12	mgandrew@kairakau.school.nz		
5	jjarmstrong	3718	JENNIFER	Year 11	jjarmstrong@kairakau.school.nz		
6	taarnold	7973	TRACEY A	Year 13	taarnold@kairakau.school.nz		
7	lharnott	1126	LEIGH HE	Year 12	lharnott@kairakau.school.nz		
8	cmartz	7847	CHERIE M	Year 9	cmartz@kairakau.school.nz		
9	grbainbridge	8330	GLENN R	Year 12	grbainbridge@kairakau.school.nz		
10	cbarr	7381	CHRISTOP	Year 12	cbarr@kairakau.school.nz		

Illustration 30 : The generated output

Finally, should you return to the area and select the 'View/edit' button at the bottom of the screen, then the following window will appear, via which you may view/edit (this is what this process is for) students' information.

**Viewing/changing personal details**

Press the first letter of the required student's family name. (click 'clear display' prior to choosing a new name.)

SADDON, Ali Barry	Student	SADDON, Ali Barry
SALLARS, Arnuchit	Login ID	lindab
SAMAROS, Terence Kane	Pin number	2337
SAO, Jay Jay Jules	Group ID	Year 10
SCATT, Jesse		
SEKENIWE, Vincent Xavier		
SELEMEN, Jordan Thomas		
SEMOETE, Hayden Andrew		
SEYRING, Dallas Wilson Tuasivi		
SHAPHARD, Justice		
SHAROCK, Conrad		
SHOW-PIDWELL, Shilisa Paretaha		
SILIMIN, Jamee-May		
SIMKIN, (hira) Matthew		
SINGH, John Meihana		

Clear Display Save Close

Illustration 31 : Viewing or editing a student's details

## 15.9 Case conversion

For a variety of reasons you might wish to globally change the case of student information in the database. The following screen allows you to perform a variety of possible changes.

**Case conversion utility**

**Step 1 : Choose case**

Convert to upper case  Convert to sentence case

**Step 2 : Choose fields**

Convert family names  Convert last line of students' addresses

Convert first names  Convert caregiver family names

Convert preferred names  Convert caregiver first names

Convert 'mail to whom'  Convert caregiver addresses

Convert student's address  Convert last line of caregivers' addresses

**Step 3 : Click 'Proceed'** Proceed

Illustration 2 : The case conversion screen

## 15.10 Family utilities

The following processes allow you to globally check some of the aspects involved. There are four such processes.

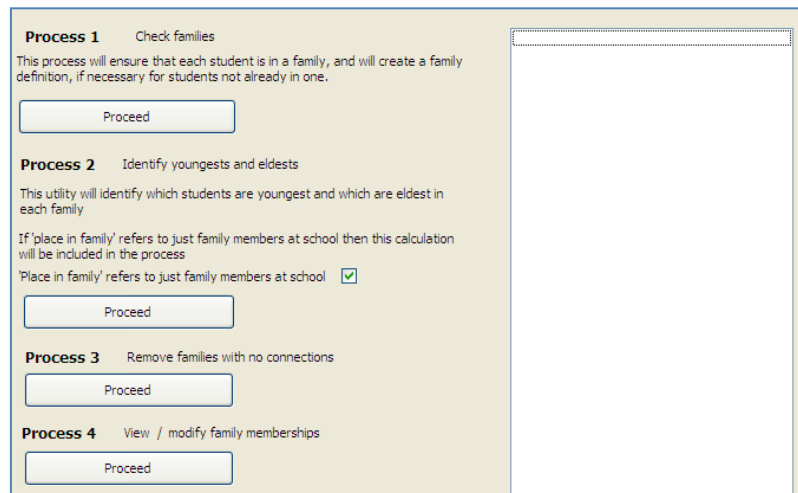


Illustration 4 : The Family utility processes

### Checking family memberships

This process will ensure that each student is in a family, and will create a family definition, if necessary for students not already in one. At least - that's what it says in the following illustration!

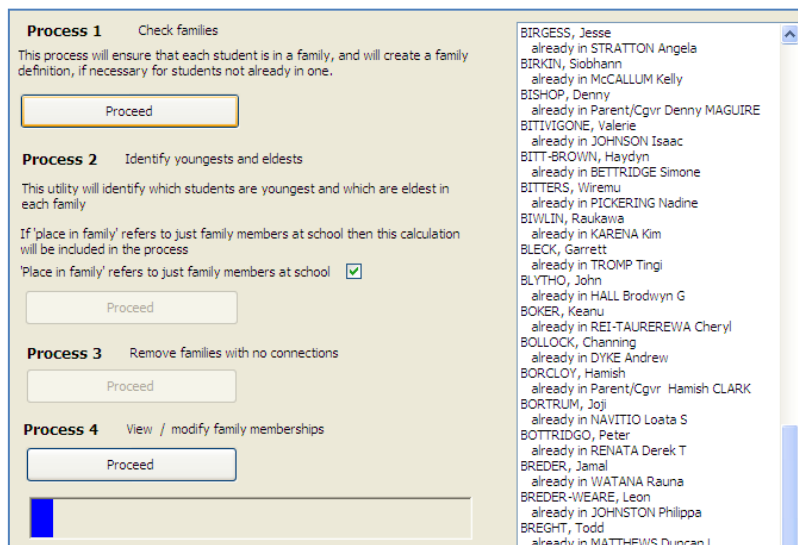


Illustration 5 : Ensuring that every student is in a family

After proceeding, each student is checked and the results displayed. You may, if you so wish, print a copy of this list.

### Identifying youngest and eldest in each family

Many schools prefer to use the youngest to deliver school newsletters to the family home.

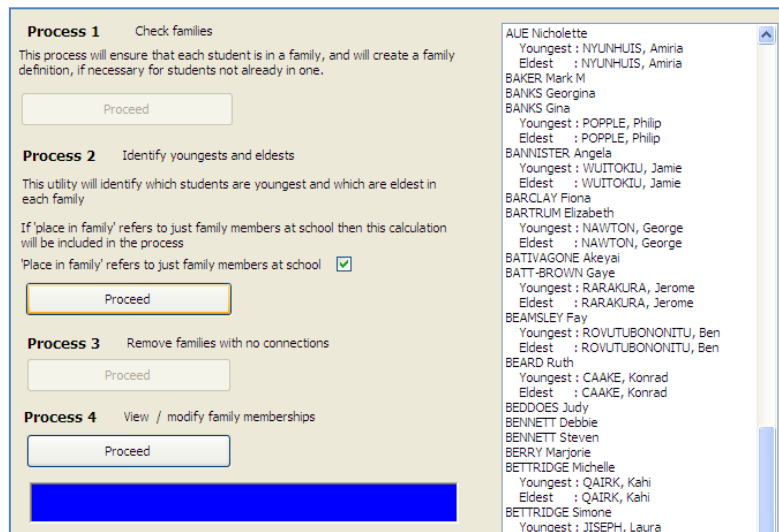


Illustration 6 : Identification of youngests and eldests

The results of the process are displayed above.

### Removal of families with no connections

When the youngest leaves, therefore no members in this family, this utility identifies such family definitions and deletes them from the database.

### View / Modify family connections

This process allows you to remove students from families and to move students from one family to another. A little of the right-hand-side display is shown below, where each family is listed, along with those students who belong to each family.

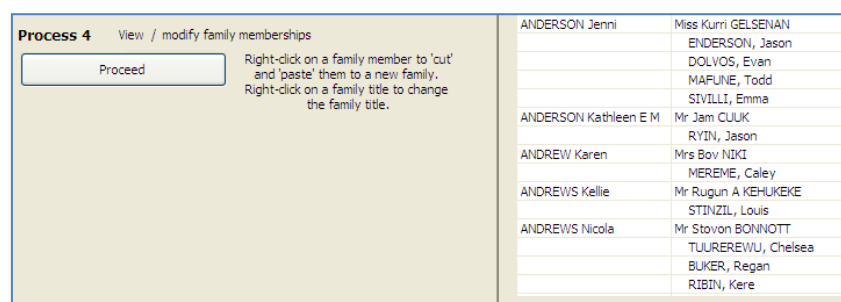


Illustration 7 : Students as members of families

To remove a student from a family, right-click on their name and select 'Cut'.

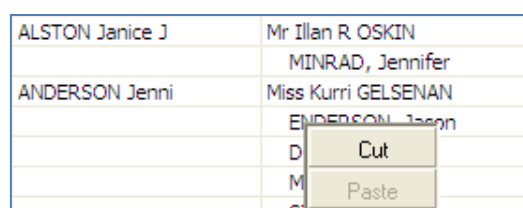


Illustration 8 : 'Cutting' a student from a family

To add them to a different family, right-click on the selected family and select 'Paste', as shown below.

ABRAHAM Mark J	Mrs Doonno PEERCE
	LOUGESSEN, Conyr
AHN Heechul	Ms Lynnu UBRUHUM
	Mrs MUMUJEE Jayanthi
	Mr N. S. S. S. S.
AHURIRI Trinette	Mrs I. S. S. S.
ALI Farook	Mr M. S. S. S.

Illustration 9 : Pasting the student into a new family

### 15.11 Board of trustee elections

When the elections come around these voting processes become invaluable. From the main menu Utilities, click Family Utilities to identify the eldest in each family .

**Process 1**    Check families

This process will ensure that each student is in a family, and will create a family definition, if necessary for students not already in one.

Proceed

---

**Process 2**    Identify youngest and eldest

This utility will identify which students are youngest and which are eldest in each family

If 'place in family' refers to just family members at school then this calculation will be included in the process

'Place in family' refers to just family members at school   

Proceed

---

**Process 3**    Remove families with no connections

Proceed

---

**Process 4**    View / modify family memberships

Proceed

Illustration Identify eldest in family

**Student Managers voter processes**

Before using this utility you must first ensure that the eldest student in each family has been identified. (Use 'Family Connections' to do this).

**Step 1** At the outset, you may wish to remove all existing voting rights from all students.

Remove Existing Voting Rights

**Step 2** When adding rights, you may select from :

- Allocate rights to the first two caregivers for each eldest student
- Allocate rights to the first five caregivers for each eldest student
- Allocate rights to all caregivers for each eldest student

**Step 3** Proceed to Allocate Rights

**Step 4** Print the Displayed List

Illustration 10 : BOT functions

*Step 1*

Step 1 removes all existing voting rights from caregivers. You may or may not wish to perform this function.

*Step 2*

Select the most suitable default rights allocation procedure for your school. Select from the three possibilities shown below.



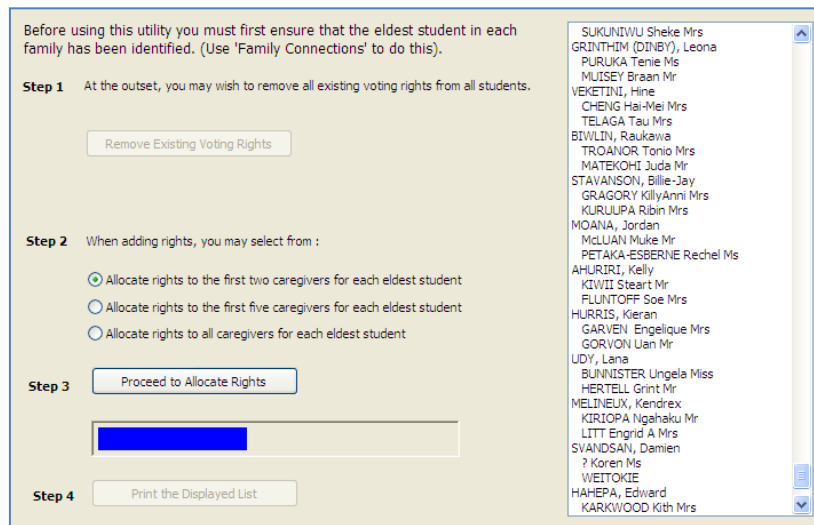


Illustration 11 : Allocation of voting rights

### Step 3

Step 3 carries out the allocation of rights.

### Step 4

Print a list of the resulting allocations.

You should now visit each student in turn to ensure that extra eligible caregivers are also allocated their right to vote. Thereafter, you can print address labels and a roll of eligible voters using the Printing Utilities.

## 15.12 Special Exports and Imports

The Special Exports and Import utilities are available from Utilities from the main menu > Special Exports / Imports button.



Illustration 12 : The special export buttons

### NZSSSC Exports and Imports

The New Zealand Secondary School Sports Council (formerly the Hillary Commission) operate a spreadsheet system by Simon Gianotti. To provide the data for his spreadsheets, MUSAC provides the NZSSSC export facility.

Then, once you have a spreadsheet full of data relating to students and their sporting achievements, you can import it back to the Classroom Manager Activities database via the import utility. The buttons for these are shown below.

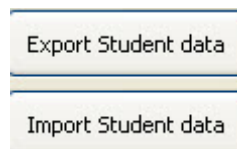


Illustration 13 : The NZSSSC buttons

#### 1 The export facility

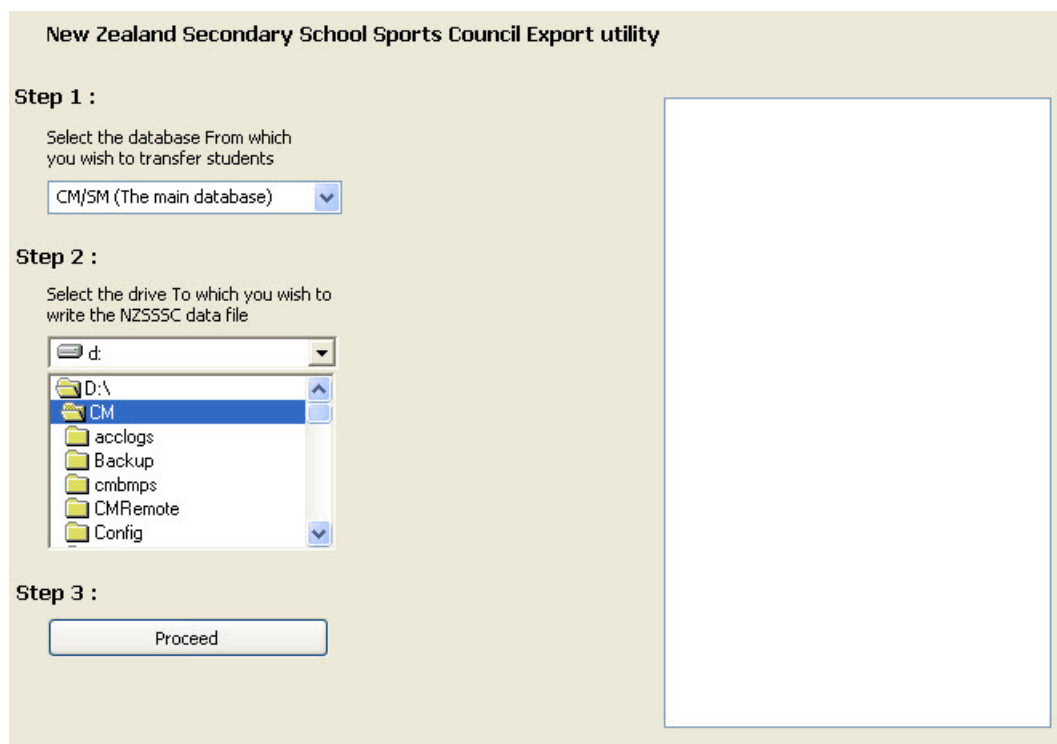


Illustration 14 : The NZSSSC export screen

On the screen shown above, select the database from which you are exporting students (CM.MDB) then identify the drive to which you wish to export your data. Click 'Proceed'.

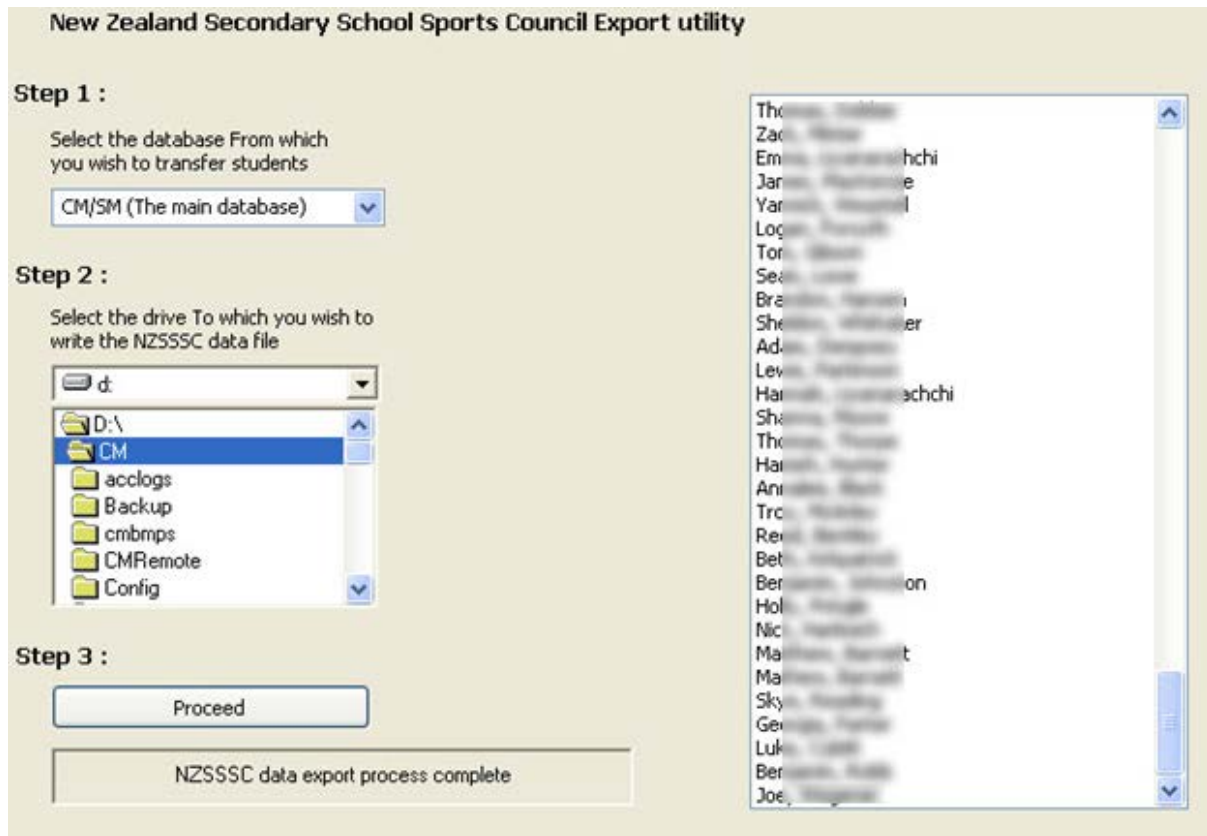


Illustration 15 : The completed export

At the finish of the process you will see a list of the students exported.

## 2 The NZSSSC Import Process

This process reverses the export process, but has a slightly different effect. Follow the steps on the screen below. (There are currently no import options in step 3). Instructions for its use are prepared and distributed by the NZSSSC around spreadsheet requirements.

**New Zealand Secondary School Sports Council Import utility**

**Step 1** The import file

**Step 2** Information found on the file  
File location :  
Records found on the file :

**Step 3** Import options

**Step 4**

Illustration 16 : The NZSSSC Import screen

At the completion of the process you will find that, if necessary, new activities have been created and the students' results stored under these headings. 'Activities' are managed using Classroom Manager.

### *asTTle Exports*

Student Manager includes the ability to export data to asTTle. Classroom Manager includes the additional ability to import asTTle results back into the Classroom Manager database.

The main export screen is shown below.

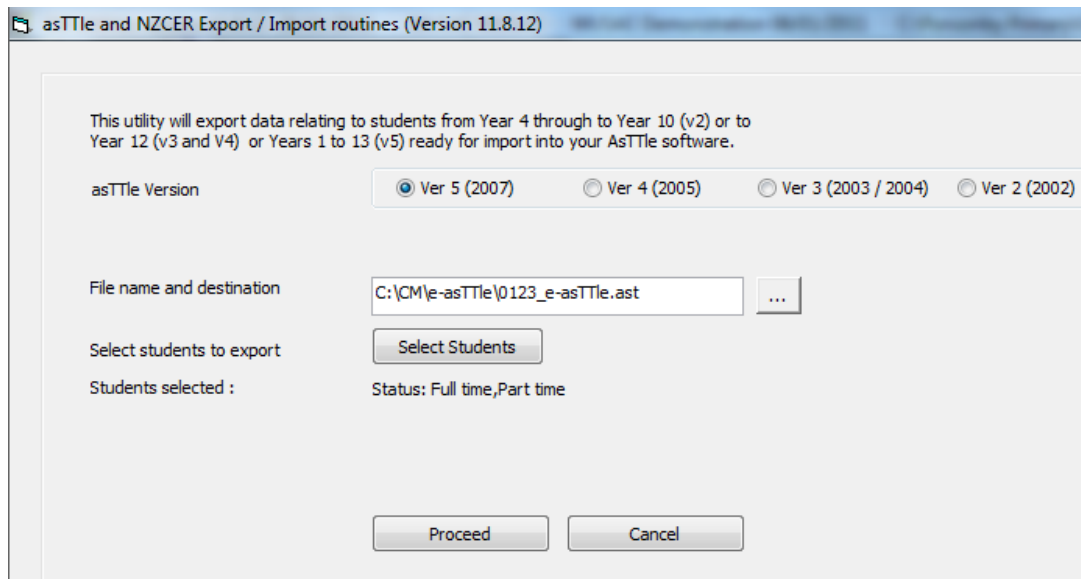


Illustration 17 : The asTTle export screen

Select the version for which you wish to export, and click in the filename entry area to specify the name and location of your choice for the export file. This is done using the student filter tool, as shown below.

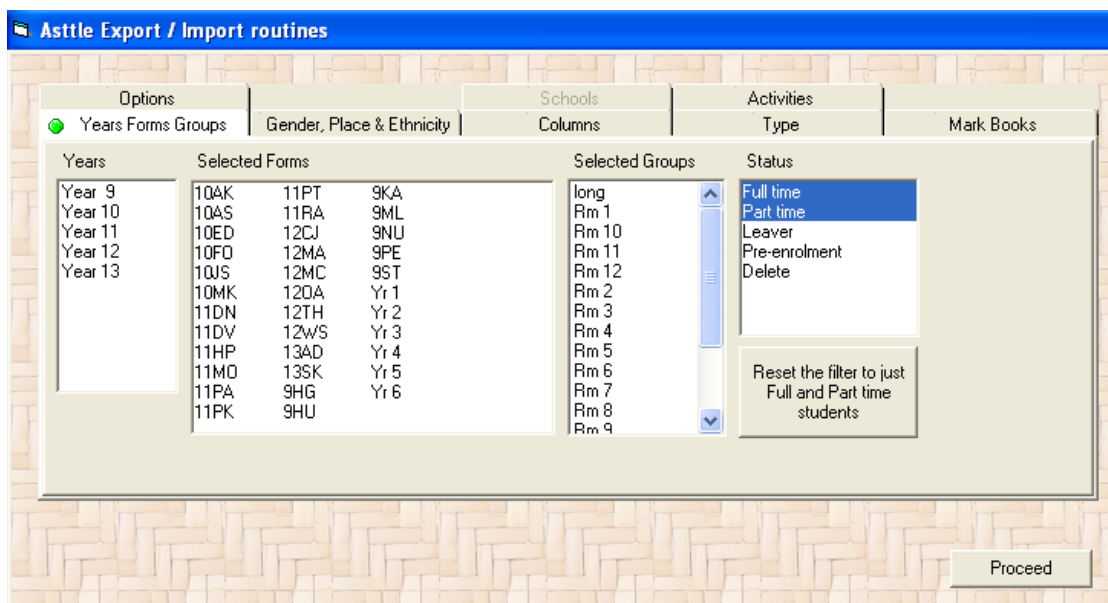


Illustration 18 : Selecting students for export

Finally, before proceeding, indicate whether you wish to export by form or group (horizontal or vertical classes), then click on the button 'Proceed'.

If, during the export process, one or more students with faulty data are identified, then you will receive a warning such as that shown below.

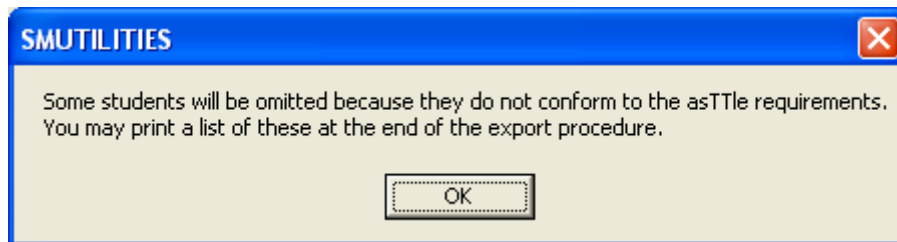


Illustration 19 : Faulty data identified.

In this case, at the completion of the export you will receive another message offering the ability to print a list of the faults identified. In this case it turned out to be one student who did not have their class specified, and they were consequently excluded from the export file.

### *Ministry of Health exports*

From time to time the Ministry of Health require a file of student information for the purpose of monitoring vaccinations. A routine to generate this file is included in Student Manager.

Click 'M.o.h. SBVS Export' for the main screen for the process shown below.

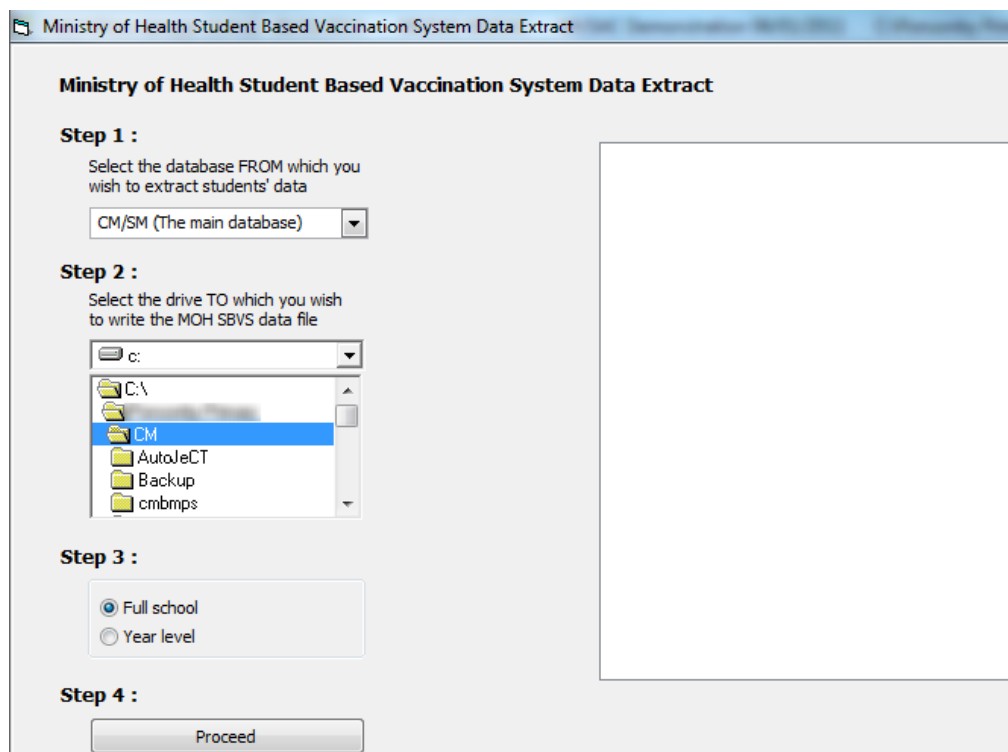


Illustration 20 : The MOH export screen

The first step is to select the database from which you wish to export. This will normally be the default one, as shown in the list of possibilities below.

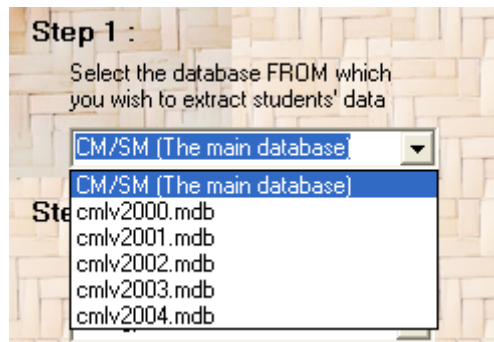


Illustration 21 : The source database selection

The second step is to select the disk drive to which you wish to export. This will normally be to a pendrive where you should have the pendrive ready to receive the file.

Next select to export either the full school or a particular year level. If you choose the latter then the following selection dialogue will appear.

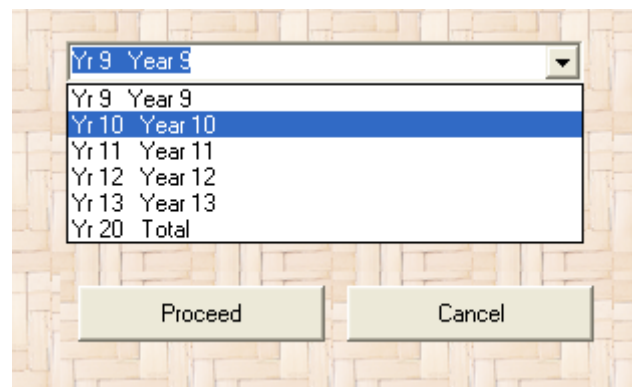


Illustration 22 : Selecting the year level

Finally, click 'Proceed' and the file will be generated as requested and the screen will display, for example, the following.

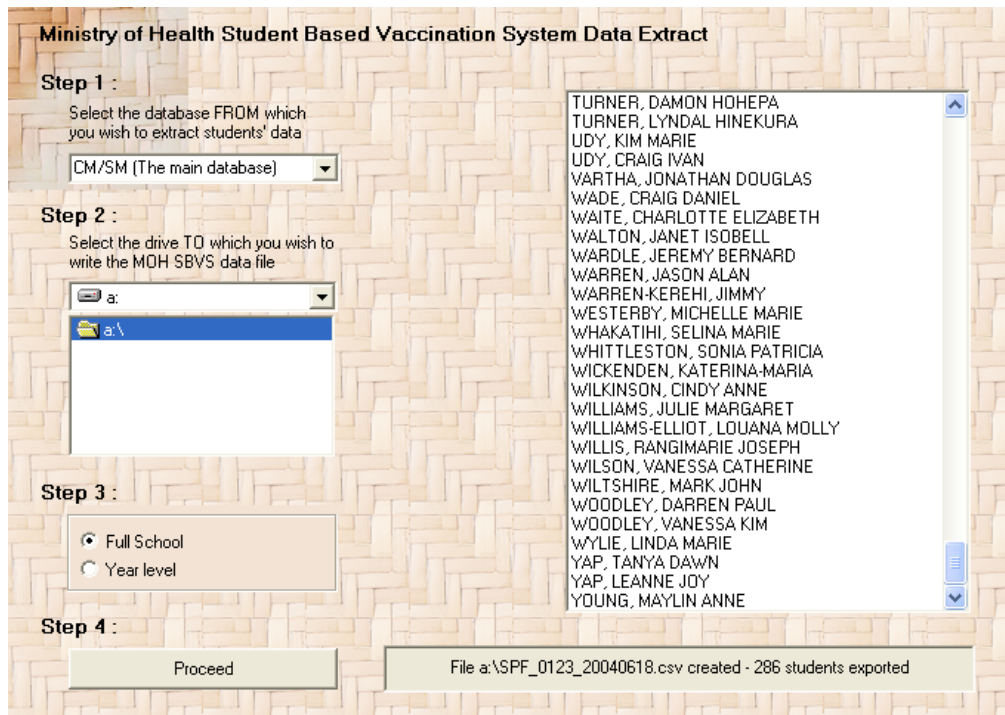


Illustration 23 : The completed export process

### 15.13 View buttons in Utilities - Basic student data

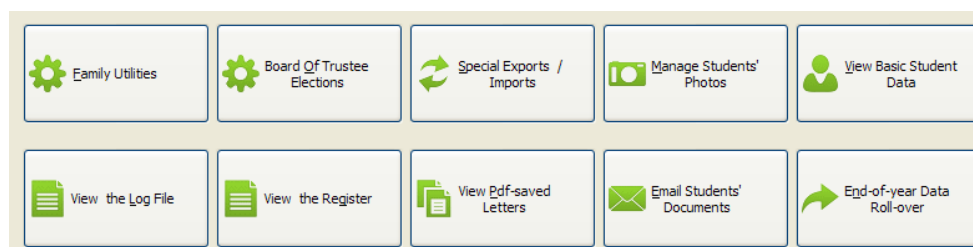


Illustration 1 : The view buttons in Utilities

The four utilities described below enable you to view information stored in the database.

The purpose of this routine is to allow a quick look at the basic information pertaining to each student. You can quickly see if years, classes, rooms etc are complete.

Click in the row headings to sort on the relevant column, and click again (or Click as I spot below...) to reverse sort.

**Please note:** you can also adjust the column widths by dragging the gaps between columns in the headings row. An example screen is shown below.



**Basic student data**

The following students are currently in the database

The information below is that contained in the basic ten columns on each student. You may sort a column by right-clicking on its heading. (Click again to reverse the sort order) You may adjust column widths by dragging the gaps between the headings.

Family name	First names	Preferred	Year	Form	Group	Gender
ABACROMBIE	JAMES JEREMY	JIMMY	9	9HG	long	Male
ABBOTT	COLIN GEOFFREY	KELVIN	14		VF1	Male
ALDERTON	KELVIN GEOFFREY	KELVIN	11		VF1	Male
ANDREW	MICHAEL GRAEME	MICHAEL	12			Male
ARMSTRONG	JENNIFER JOAN	JENNY	11		VF1	Female
ARNOLD	TRACEY ANNE	TRACEY	13		VF1	Female
ARNOTT	LEIGH HELEN	LEIGH	12		VF1	Female
ARTZ	CHERIE MAI	CHERIE	9	9ST	VF1	Female
BAINBRIDGE	GLENN RAYNAL	GLENN	12			Male
BARR	CHRISTOPHER	CHRISTOPHER	12			Male
BARRETT	MONIQUE CATHRINA	MONIQUE	10			Female
BARRETT	NICHOLAS OLIVER	NICHOLAS	12			Male
BARRIE	NOEL LINDSAY	NOEL	13			Male
BASSETT	LEIGHANNE	LEIGHANNE	9	9HU		Female
BASSETT	DIANNA JANE	DIANNA	12			Female
BATCHELAR	SCOTT JOHN	SCOTT	13			Male
BATT	SUZANNE MARGARET	SUZANNE	9	9KA		Female
BAYNE	LUKE DANIEL	LUKE	10			Male
BRAMWELL	ASHLIN ROBIN	ASHLIN	12			Male
BRIGGS	TRACEY MARIE	TRACEY	10			Female
BRIND	DAKIN NEIL	DAKIN	11			Male

Full times : 287 Part times : 2 Leavers : 0 Pre-enrolments : 0 Deleted students : 0 Database columns : 2497

Illustration 2 : Viewing the basic student data

At the bottom is a count of the number of students in each of the status categories.

### 15.14 View the log file

Each time a user enters the package or performs a particular operation this information is recorded in the package log file, a section of which is shown below.

**Student Manager view logfile**

**Student Manager log file** Click on a column heading to sort that column. Click again to reverse the sort order.

Date & time	Log Date	User	Detail
26/02/2003 08:30:26	26/02/2003	Hidden	Logged in
26/02/2003 08:30:34	26/02/2003	Hidden	Exited
26/02/2003 08:40:38	26/02/2003	Hidden	Logged in
26/02/2003 08:40:45	26/02/2003	Hidden	Accessed Configuration module
26/02/2003 08:40:48	26/02/2003	Hidden	Exited
26/02/2003 08:41:46	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 08:43:53	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 08:47:13	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 08:48:36	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 08:54:21	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 08:55:56	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 08:57:14	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 08:57:53	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 08:58:10	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 08:59:05	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 09:00:28	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 09:01:26	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 09:02:28	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 09:18:14	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 09:18:45	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 09:19:01	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 09:19:56	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 09:20:09	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 09:20:19	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 09:20:29	26/02/2003	Hidden	Accessed Exit financials
26/02/2003 09:20:59	26/02/2003	Hidden	Accessed Financial transactions
26/02/2003 09:21:47	26/02/2003	Hidden	Accessed Exit financials

Search in 2003 Search for Search Print (selection)

Illustration 3 : A section of the log file

At the bottom of the screen is a text entry box wherein you can type a word or phrase or part thereof for which you wish to search. Click the 'Search' button to start your search from the top of the file, and click repeatedly to move to the next occurrence.

04/03/2003 07:40:32	04/03/2003	Hidden	Logged in
04/03/2003 07:40:37	26/02/2003	Hidden	Accessed Utilities module
04/03/2003 07:40:41	26/02/2003	Hidden	Exited
04/03/2003 08:11:33	04/03/2003	Hidden	Logged in
04/03/2003 08:11:37	26/02/2003	Hidden	Accessed Utilities module
04/03/2003 08:11:44	26/02/2003	Hidden	Exited
04/03/2003 10:36:37	04/03/2003	Hidden	Logged in
04/03/2003 10:36:42	26/02/2003	Hidden	Accessed Utilities module

Search in 2003 Search for accessed util Search Print (selection)

Illustration 4 : Searching for a particular word or phrase

Alternatively, by clicking in a column heading you may have that column sorted, making it then easy to find all occurrences of a particular entry within the file. Once you have found that for which you are looking, you can highlight them by dragging the cursor over them, and you then have the option to print the highlighted selection using the relevant button at the bottom of the screen.

**Student Manager log file** Click on a column heading to sort that column. Click again to reverse the sort order.

Date & time	Log Date	User	Detail
18/02/2004 12:01:26	18/02/2004	MUSAC MUSAC	Logged in
18/02/2004 12:01:37	18/02/2004	MUSAC MUSAC	Accessed Utilities module
18/02/2004 12:01:42	18/02/2004	MUSAC MUSAC	Exited
18/02/2004 12:41:15	18/02/2004	MUSAC MUSAC	Logged in
18/02/2004 12:41:26	18/02/2004	MUSAC MUSAC	Accessed Utilities module
18/02/2004 12:41:33	18/02/2004	MUSAC MUSAC	Exited
18/02/2004 12:53:52	18/02/2004	MUSAC MUSAC	Logged in
18/02/2004 12:53:52	18/02/2004	MUSAC MUSAC	Logged in
18/02/2004 12:54:10	18/02/2004	MUSAC MUSAC	Logged in
18/02/2004 12:54:14	18/02/2004	MUSAC MUSAC	Accessed Pastoral module
18/02/2004 12:54:18	18/02/2004	MUSAC MUSAC	Accessed Pastoral transactions
18/02/2004 12:54:51	18/02/2004	MUSAC MUSAC	Pastoral - new transaction for 13600540
18/02/2004 12:55:33	18/02/2004	MUSAC MUSAC	Accessed Exit from Pastoral
18/02/2004 12:55:36	18/02/2004	MUSAC MUSAC	Accessed Utilities module
18/02/2004 12:55:41	18/02/2004	MUSAC MUSAC	Accessed : View register
18/02/2004 12:56:10	18/02/2004	MUSAC MUSAC	Accessed Editing module
18/02/2004 12:56:30	18/02/2004	MUSAC MUSAC	Accessed Configuration module
18/02/2004 12:56:34	18/02/2004	MUSAC MUSAC	Accessed : Teachers and dossiers
18/02/2004 12:56:38	18/02/2004	MUSAC MUSAC	Accessed : Group maintenance
18/02/2004 12:57:16	18/02/2004	MUSAC MUSAC	Accessed :
18/02/2004 13:00:49	18/02/2004	MUSAC MUSAC	Exited
19/02/2004 10:11:31	19/02/2004	MUSAC MUSAC	Logged in
19/02/2004 10:11:35	19/02/2004	MUSAC MUSAC	Accessed Utilities module
19/02/2004 10:11:49	19/02/2004	MUSAC MUSAC	Accessed : Photograph management
19/02/2004 10:15:25	19/02/2004	MUSAC MUSAC	Exited
19/02/2004 10:20:34	19/02/2004	MUSAC MUSAC	Logged in

Illustration 5 : Highlighting a section for printing

### 15.15 View the register

Every time particular items of data are changed for a student, that information is recorded on the register. This used to be called the 'change-of-status' register, but the Ministry of Education has expanded its use to include other fields. The Ministry will, from time to time, conduct a roll audit on your school and this will include extracting data from and viewing the register.

Illustration 6 : The search request screen

You have a number of options when it comes to deciding what you wish to look for. These are displayed below and are somewhat self-evident. You can search for : the full register, just new arrivals, just departures, a family name or part thereof, a particular status change or entries between two specified dates.

Click on a column heading to sort that column. Click again to reverse the sort order.  
You may adjust the column widths by dragging the top row boundaries.

Date	Student	User	Old status	Status	Level	Form	Group
04/12/1997	LAWRY, KERRY	MUSAC, Musac	Full time	Leaver			
05/02/1998	BAINBRIDGE, GLENN	MUSAC, Musac	Full time	Leaver			
13/02/1998	PREBENSEN, ANNETTE	MUSAC, Musac	Full time	Leaver			
13/02/1998	PREBENSEN, ANNETTE	MUSAC, Musac	Full time	Leaver			
20/02/1998	ROLLS, PAUL	MUSAC, Musac	Full time	Leaver			
20/02/1998	ROLLS, PAUL	MUSAC, Musac	Full time	Leaver			
10/01/2003	SOMERFIELD, PAULA		Full time	Full time	9	9NU	
10/01/2003	SCHWARTFEGER, AARON		Full time	Full time	11		
10/01/2003	RATCLIFFE, DANIEL		Full time	Full time	10		
10/01/2003	SEARLES, VIVIAN		Full time	Full time	9	9HG	
10/01/2003	SENG, KURA		Full time	Full time	8		
10/01/2003	RANSFIELD, TANYA		Full time	Full time	9	9HU	
10/01/2003	SENIOR, NIGEL		Full time	Full time	11		
10/01/2003	SHAW, RAELEEN		Full time	Full time	9	9KA	
28/01/1998	BURNHAM, SOPHIA	MUSAC, Musac	Full time	Leaver			
29/01/1998	BENNET, SHANE	MUSAC, Musac	Full time	Leaver			

Illustration 7 : The results of the search

In the example shown you can see some students whose status has changed (from Full time to Leaver, and others whose levels and/or classes have changed).

The register is at the heart of a background process used in Classroom Manager which enables you to view classes and other student data as at any nominated date.

## 15.16 View PDF saved letters

The utilities menu makes it possible for you to print letters to parents concerning a student's behaviour (good or bad...). In addition, you may have the letters stored as PDF documents. The purpose of this utility is to allow you to retrieve and view these documents.

For the purposes of the manual, the pastoral utility was used to produce a letter concerning one student. (The process of producing the letter is detailed in Pastoral.) As a result, the screen below offers the one student, with one letter.

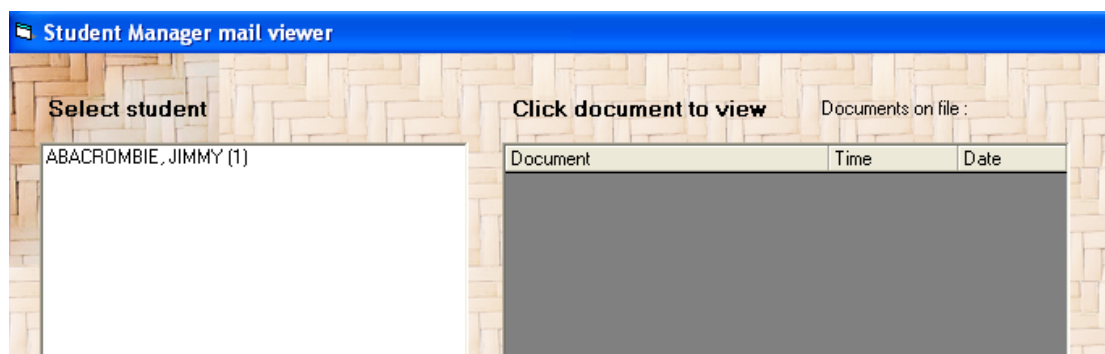


Illustration 8 : One student has one document

Selecting the student, his or her letters are displayed on the right hand list, as shown below.

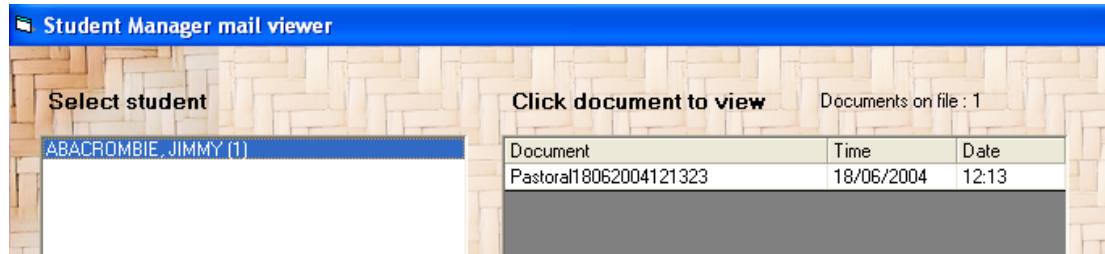


Illustration 9 : A letter to be viewed

Click on the letter in the right hand list and Adobe Reader will load, displaying the selected letter. (If you do not have Adobe Reader, it is available from the Adobe website and is also supplied under 'Other programs' on the MUSAC CDROM.)



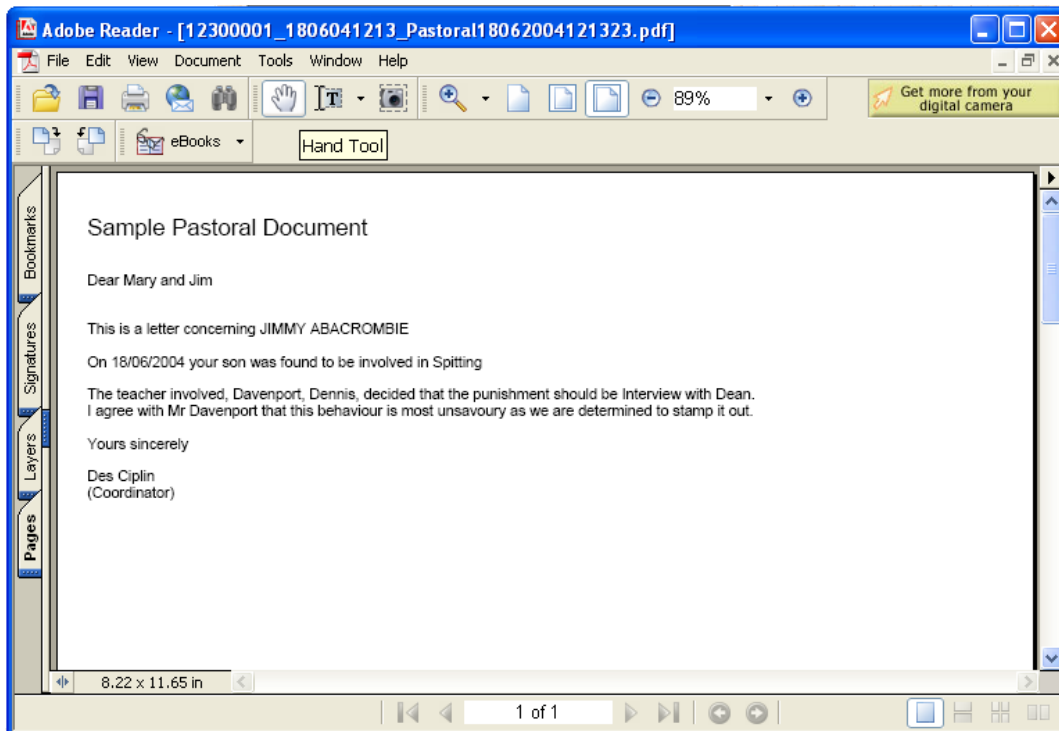


Illustration 10 : The letter home

### 15.17 eMail Students' documents to caregivers

The point of this routine is that you may access the process here WITHOUT having to first generate a PDF document. This area is fully detailed in the Classroom Manager documentation. The email address for caregivers resides in Student Manager.

If you have ticked the green area ('printing from document mode' or 'printing from booklets') then, at the conclusion of the printing process, the following screen will be displayed.

**Please note:** in order to generate PDF documents suitable for emailing you MUST have allocated students their login ids using the Induct process in CMAAdmin. This gives every student a login id, an email address, and a pin number. It is the students' login ids which form part of the pdf document names which are then stored in subdirectories created, one for each student, named according to their login id e.g. 'abacrombiejj'.

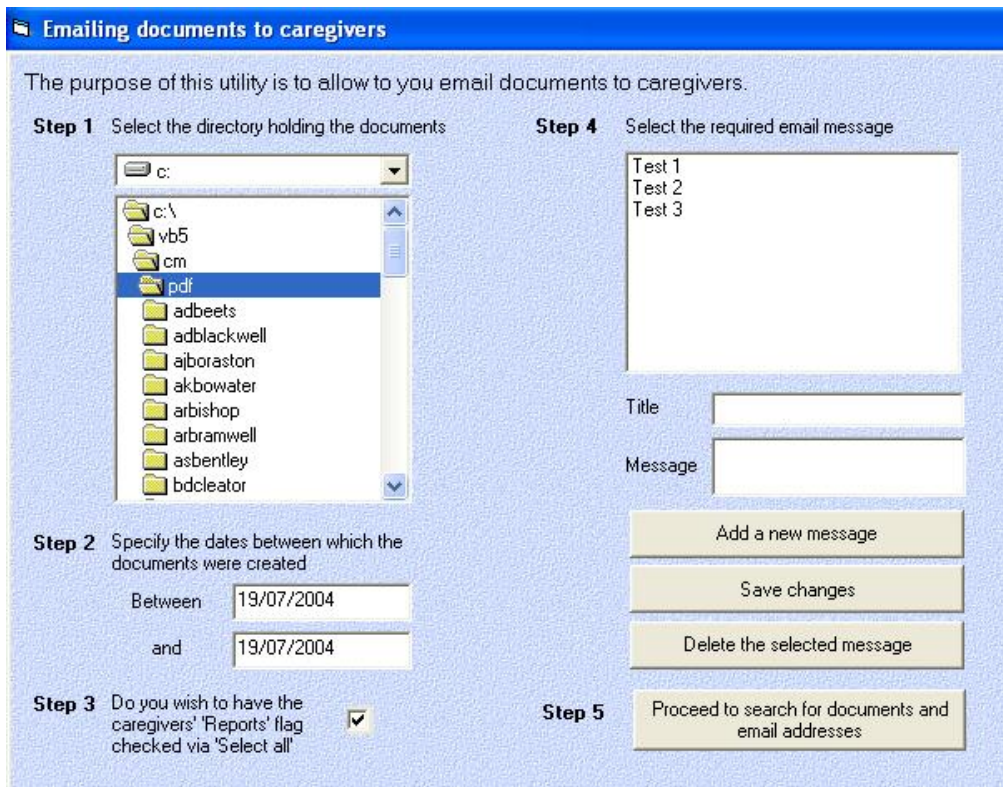


Illustration 11 : The main emailing screen

When you arrive at this screen, the directory under which you chose to have the students' subdirectories will be pre-selected for you, and the first few of the subdirectories will be visible below the chosen directory.

The 'From' and 'To' dates will have also already been chosen for you.

All that remains is for you to decide whether or not you wish to send to all caregivers of each student or only to those whose 'Reports' flag is set to 'Yes'.

Finally, you must design one or more messages to form the basis of the email, to which the student's document will be attached prior to transmission.

This is done via step 4 on the right hand side of the screen. During testing, three messages have been created. You can edit an existing message by clicking on it, then changing either its title or its message, both of which are shown below the list.

The right side of the screen is shown below. Use the button titled 'Add a new message' to create a new message. Give it a suitable title, then click in the message area to access the word processor, where you can type in your message.

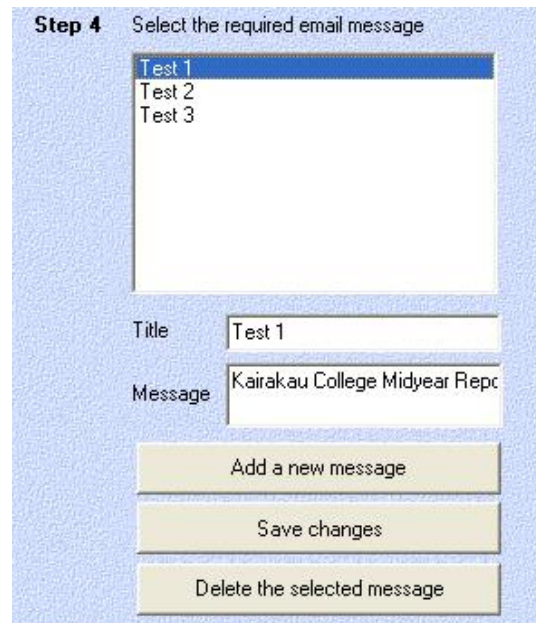


Illustration 12 : Designing messages for your emails

The screen below illustrates a message which has been created during the testing process. You will notice that use has been made of the code insertion tool to refer to the student by name. This message is provided as a default message with the program. You should alter it, or generate others, to meet your school's particular needs.

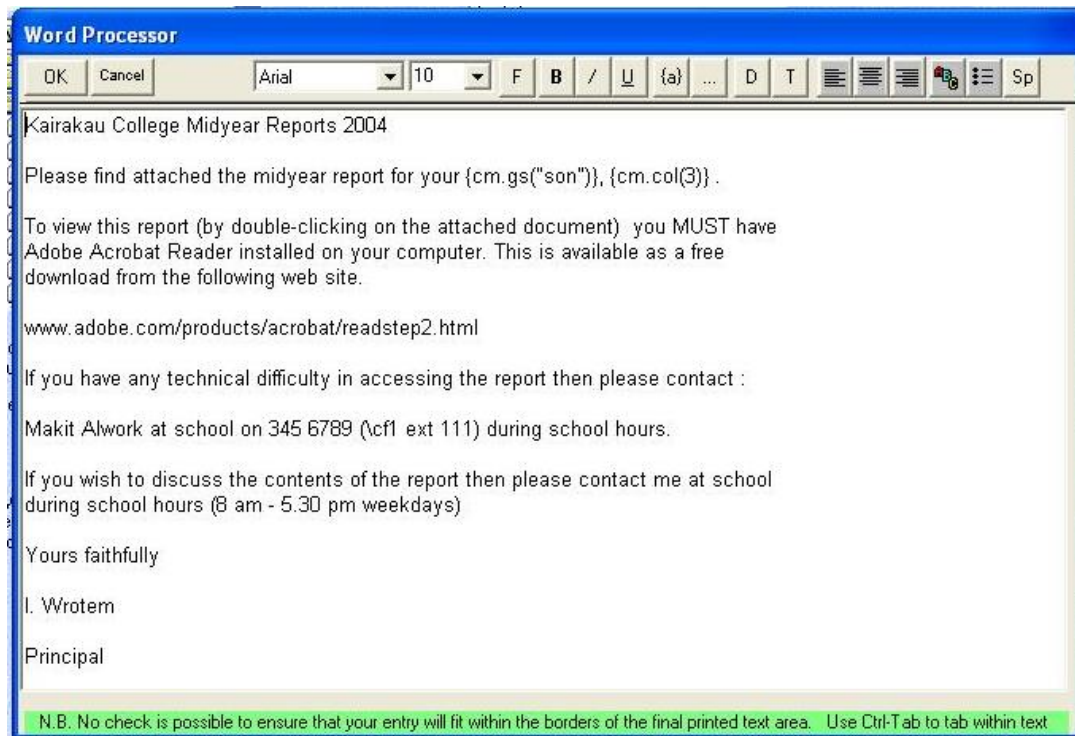


Illustration 13 : An email message in the word processor

Once you have created your message(s) select the one which you wish to use and click the button in step 5 – to take you to the next screen.



Emailing documents to caregivers				
The following documents and caregiver emails have been identified				
Student name	Document	Caregiver	Caregiver email	Reports
BIRD, Jennifer	jbird_Junior Interim.pdf	Mr BIRD		
BIRD, Jennifer	jbird_room.pdf	Mr BIRD		
BIRD, Jennifer	jbird_Junior Interim.pdf	Mrs BIRD		
BIRD, Jennifer	jbird_room.pdf	Mrs BIRD		
BIRD, SANDRA	smbird_room.pdf	Mr BIRD		
BIRD, SANDRA	smbird_room.pdf	Mrs BIRD		
BISHOP, ADAM	arbishop_room.pdf	Mr BISHOP	r.h.butler@massey.ac.nz	Yes
BISHOP, ADAM	arbishop_room.pdf	Mrs BISHOP	m.v.ogle@massey.ac.nz	Yes
BISHOP, CLIFTON	cmbishop_room.pdf	Mr BISHOP	r.h.butler@massey.ac.nz	Yes
BISHOP, CLIFTON	cmbishop_room.pdf	Mrs BISHOP	m.v.ogle@massey.ac.nz	Yes
BODY, SANDRA	smbody_room.pdf	Mr BODY		
BODY, SANDRA	smbody_room.pdf	Mrs BODY		
BOWATER, ANGELA	akbowater_room.pdf	Mr BOWATER		
BOWATER, ANGELA	akbowater_room.pdf	Mrs BOWATER		
BRAMWELL, ASHLIN	arbramwell_room.pdf	Mr BRAMWELL		
BRAMWELL, ASHLIN	arbramwell_room.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRAMWELL, KARL	kmbiramwell_Junior Interim.pdf	Mr BRAMWELL		
BRAMWELL, KARL	kmbiramwell_room.pdf	Mr BRAMWELL		
BRAMWELL, KARL	kmbiramwell_Junior Interim.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRAMWELL, KARL	kmbiramwell_room.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRIGGS, TRACEY	tbriggs_room.pdf	Mr BRIGGS		
BRIGGS, TRACEY	tbriggs_room.pdf	Mrs BRIGGS		

Illustration 14 : The identified documents

When you click the button in step 5, the program scans for subdirectories and documents, and lists them in the display, as shown above. Then it passes through the identified documents, retrieving the name of the student concerned, and the names of any caregivers, whether or not they have email addresses and whether or not their 'Report' flag is set to 'Yes'. Both of these are shown in the right hand two columns above.

You can enter or edit caregivers' email addresses via this screen, as shown below. Naturally, you can only do this if a caregiver has been identified and listed.

if	Mr BODY		
if	Mrs BODY	j.k.body@paradise.net.nz	
v.pdf	Mr BOWATER		
"	Mrs BOWATER		

Illustration 15 : Editing a caregivers email address

You can also toggle the 'reports' setting between 'Yes' and 'No' by double-clicking in the right hand column. Naturally, again, you can only do this if a caregiver is listed for the student.

BIRD, SANDHA	smbird_room.pdf	Mrs BIRD		
BISHOP, ADAM	arbishop_room.pdf	Mr BISHOP	r.h.butler@massey.ac.nz	Yes
BISHOP, ADAM	arbishop_room.pdf	Mrs BISHOP	m.v.ogle@massey.ac.nz	Yes
BISHOP, CLIFTON	cmbishop_room.pdf	Mr BISHOP	r.h.butler@massey.ac.nz	Yes
BISHOP, CLIFTON	cmbishop_room.pdf	Mrs BISHOP	m.v.ogle@massey.ac.nz	Yes
BODY, SANDRA	smbody_room.pdf	Mr BODY		
BODY, SANDRA	smbody_room.pdf	Mrs BODY	j.k.body@paradise.net.nz	Yes
BOWATER, ANGELA	akbowater_room.pdf	Mr BOWATER		
BOWATER, ANGELA	akbowater_room.pdf	Mrs BOWATER		
BRAMWELL, ASHLIN	arbramwell_room.pdf	Mr BRAMWELL		
BRAMWELL, ASHLIN	arbramwell_room.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRAMWELL, KARL	kmbiramwell_Junior Interim.pdf	Mr BRAMWELL		
BRAMWELL, KARL	kmbiramwell_room.pdf	Mr BRAMWELL		
BRAMWELL, KARL	kmbiramwell_Junior Interim.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRAMWELL, KARL	kmbiramwell_room.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRIGGS, TRACEY	tbriggs_room.pdf	Mr BRIGGS		

Illustration 16 : The valid selections

Finally, you can select those caregivers who do have email addresses from the list. If you click the 'Select all' button at the bottom of the list then all suitably endowed caregivers (i.e. those with

addresses and – if you've chosen to restrict the sending to just those with 'Reports' set to yes – those who match this setting. In the illustration above several caregivers have been automatically selected.

Click on the 'Proceed to emailing' button at the bottom of the screen and you will move to the final screen – the transmission screen, shown below.

Illustration 17 : The transmission screen

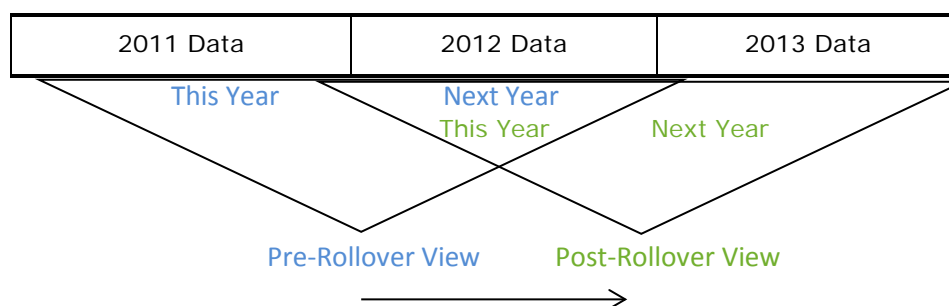
In the top left corner of the screen ensure that two entries are correct; your school's email address FROM which the emails are being sent, and the school Internet Service Provider's (ISP) address in the form smtp.aaaa.aaa.aa, as shown above. Once these have been set they will be remembered by the program for future. The addresses above are fictitious. Once done, 'Send them' and they will be listed on the right of the screen, as shown below.

Illustration 18 : The transmission report

You may then print just those which failed to transmit, or all transmissions.

## 15.18 Updated End-of-year rollover process

'Rollover' is the process of moving the current view of student data forward in readiness for the new school year. For example, when rolling from 2011 to 2012:



Before rollover, the data held for 2011 is considered **This Year's** data and the data held for 2012 is considered **Next Year's** data.

After rollover, the data held for 2012 is considered **This Year's** data and the data held for 2013 is considered **Next Year's** data.

Primary and Intermediate/Secondary rollovers are performed in the same way, with leavers excluded from the process. There are three sections - Data Preparation, Rollover Settings Selection, and Perform Rollover. The Utilities menu contains functionality to clear the 'Renameables'. The main menu screen displays the Current Configuration year at the top of the rollover screen and each student must have a year level and vertical group for the current year for the rollover to proceed. The previous rollover detail displays whether Trial or Full, with date and time of the last Full rollover. It is important to bear in mind that there is no magic in the rollover process; it just saves you setting up students manually.

### 1 Data Preparation

#### • Leaver Processing

Before performing the end of year rollover, click the "Leaver Selection" button and change the status of the final year students in the school from "Full-Time" to "Leaver". This will exclude these students from the Rollover Process and their data will not be set up for the following year when they will no-longer be attending the school.

#### • School Configuration

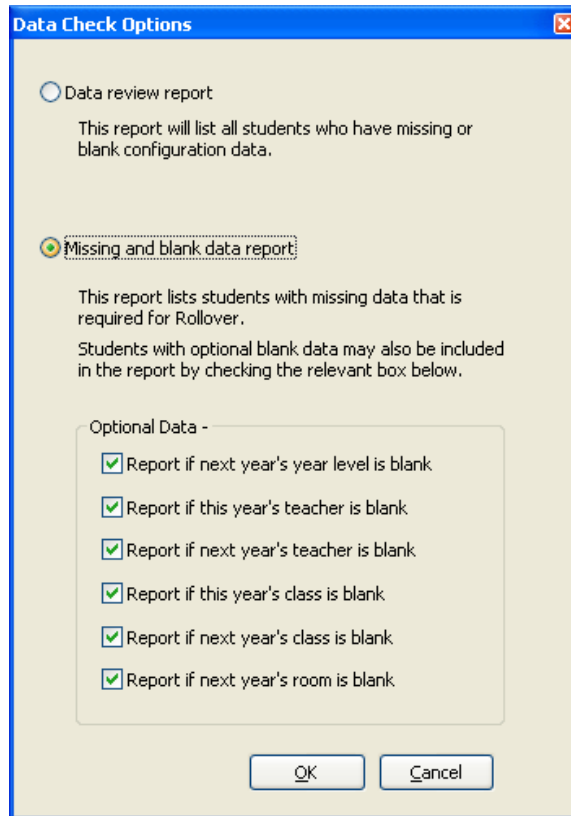
Before performing the end of year rollover, every student must have a current year level and a current vertical group (eg. a grouping that can go across more than one year level e.g. House, Tutor Group) as set up from the SM Main Menu > 'Configuration' > 'Years and Classes'. This data is required before moving on to the Rollover process and can be entered on the Add/Edit Student screen (the student's Personal document). The Horizontal Group (eg. Room or Form) and/or Vertical Group may also be entered for the next year if desired, at this time.

Click 'Data Check' to view a report on the entered data, and to check your preparation for the next year.

If duplicate Vertical or Horizontal groups have been set up in 'Configuration', these will be reported and must be corrected before continuing. Duplicates are no longer permitted.

The Data Check provides possible report choices.

- 1 The first report selection in the Data Check Options dialogue box allows all the relevant data entered against the student to be reviewed.
- 2 The second reports on missing required data (Years and Vertical groups for this year) and any other blank data that was selected for inclusion on the report.



**Students for Review - These students have some missing or incorrect data. Please review the data that is missing from this list prior to rollover.**  
The numbers in brackets are the configuration years.

Student	Class This Year	Class Next Year	Room This Year	Room Next Year	This Year	Next Year	Teacher this year	Teacher Next Year
Adams, Jean	d (2009)	eek (2010)	FC4 (2009)		9	10		
BRAKUS, Stephen		eek (2010)	p2 (2009)	FC3 (2010)	10	11		
CORMIER, Rod		t (2010)	FC3 (2009)	FC3 (2010)	10	11		
DACH, Damon		t (2010)	FC2 (2009)	FC2 (2010)	10	11		
DACH, Odie		c (2010)	p2 (2009)		10	11		
DAVIS, Janick		r (2010)	p2 (2009)	FC1 (2010)	11	12		

Illustration 18a : Data Review Report

**Data Check - Students with Missing Required Data and Selected Blank Optional Data 03/11/2011**

Selected Options: No next year level, No teacher this and/or next year, No class this year, No class next year, No room next year.

Student	Required Missing Data	Optional Blank Data
Adams, Jean		Teacher for this year is blank
BRAKUS, Stephen		Teacher for next year is blank
		Class for 2009 is blank
		Teacher for this year is blank
		Teacher for next year is blank
CORMIER, Rod		Class for 2009 is blank
		Teacher for this year is blank
		Teacher for next year is blank
DACH, Damon		Class for 2009 is blank
		Teacher for this year is blank
		Teacher for next year is blank
DACH, Odie		Class for 2009 is blank
		Teacher for this year is blank

Illustration 18b : Missing and Blank Data Report

Changes can be made to the new years' data after rollover if necessary.

## 2 *Rollover Settings Selection*

There are two choices to be made in this section.

### 1 Change Pre-enrolments to Full Time

By checking the box, the rollover process can also automatically change the status of pre-enrolled students to Full-time. A single year level can be changed by selecting that year from the drop-down, or "All" can be selected to change all pre-enrolled students regardless of their year level.

### 2 Maori Language Learning Index

Check this box to automatically clear the Maori Language Learning Index and set it to "Not Learning Maori Language" for all current students during the rollover process.

## 3 *Perform Rollover*

The rollover can be performed as a Trial and the report checked before continuing on to perform the Rollover in Full.

Trial mode does everything that a Full Rollover does but saves the changes on the Backup database rather than the database in use. A full report showing what changes will occur is produced. The Trial Rollover may be performed as many times as is required.

A Full Rollover is performed on the database in use (the 'real' data) and may only be performed once. The report produced can be printed and, if desired, saved as a PDF document for future reference.

A set of rules, shown below, is followed during the process.

- Leavers are excluded from the process.
- Year Level - The student's year level will be incremented for the next year. Year level configuration will be updated for next year.
- Vertical Group - If blank for next year, the Vertical Group for this year will be copied to next year. Any Vertical Group already entered for next year will be retained. Vertical Group configuration for the next year will be updated to reflect this.
- Horizontal Group – Horizontal Group for this year will NOT be copied to next year. Any Horizontal Group already entered for next year will be retained while all others are set to blank. If the class is 10AB it will NEVER be incremented to 11AB.
- Pre-enrolled students with the selected year level will be changed to Full-Time and their year level incremented.
- Teacher – If blank for the next year, this year's teacher will be copied to next year. If a teacher has been entered for next year, the teacher's name will be retained.

#### 4 Backups and Documentation

The rollover process creates a full set of backups and documentation found in the application folder, in a sub folder called 'EOYBackup'.

### 15.19 Preparing a Library Update disk

The main screen for this process follows.

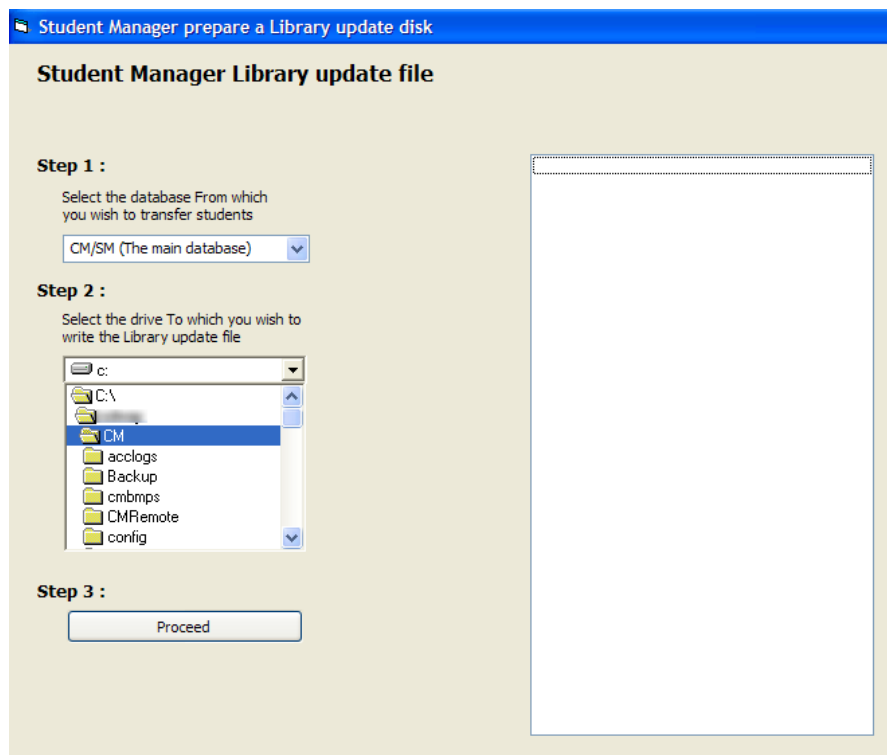


Illustration 4 : The Library Update screen

If your school library is on a computer connected to the school network, and they are using MUSAC Library Manager, they will be able to obtain their student information directly from Student Manager without the process described in this chapter.

The purpose of this process is to generate a file of student information, on a pen drive, which can be taken to the school's MUSAC library package, via which the data may be imported to update the library's list of borrowers. You may, alternatively, have the export file created elsewhere on the network.



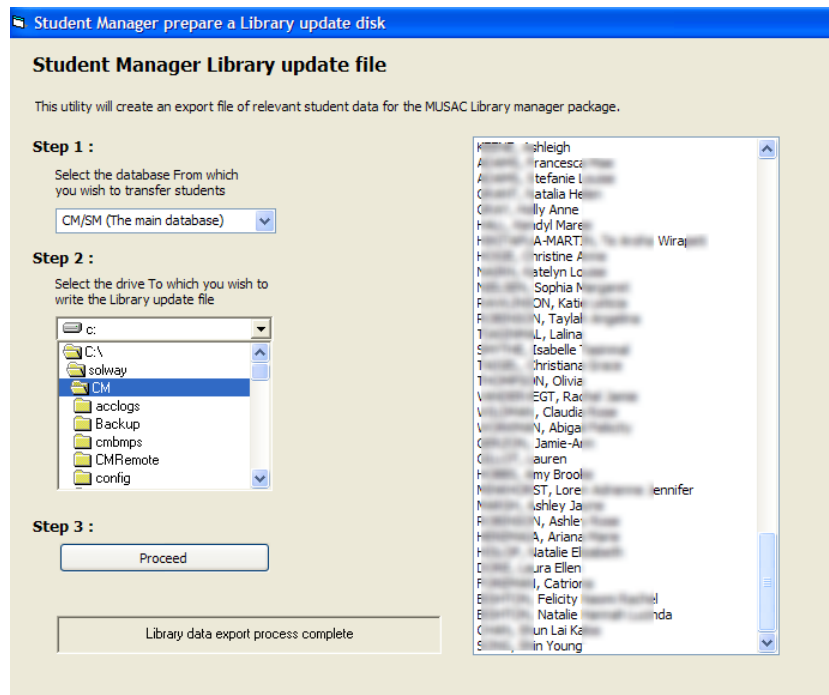


Illustration 5 : The creation of the library update file

## 15.20 Summarising Absence data

ClassRoom Manager, in generating student reports, relies on the import of summarised absence data from the MUSAC Absence package. The purpose of this routine is to generate that summative data and to have it stored in attendance data columns which you have created – via ClassRoom Manager, where to add attendance data to your document through the column picker, the path is Student Manager > Attendance.

## 15.21 Managing students' photographs

Student Manager has the ability to attach as many student photographs, examples of handwriting, art work, video clips, sound bites etc as you wish. All you have to do is to create a column of type 'Text' and connect a photograph tool on a document to that column and the document will display the file (be it a photograph or a video clip etc) for the student concerned.

The most time consuming part of the process is the attachment of individual students photographs to their documents.

We've added a couple of utilities to try to make this process easier – see Photograph management buttons.

*Connecting students' photographs - to the relevant column*

Before starting this process ensure that all of your students' photographs have been placed in a relevant directory. We've created a 'media' subdirectory under the \CM directory for this purpose, but you may use any directory of your choice.

If you are concerned with photographs, the names of which are stored in the 'Photo album' columns, then you will find a subdirectory for each year under the \cm\media subdirectory, as shown below.

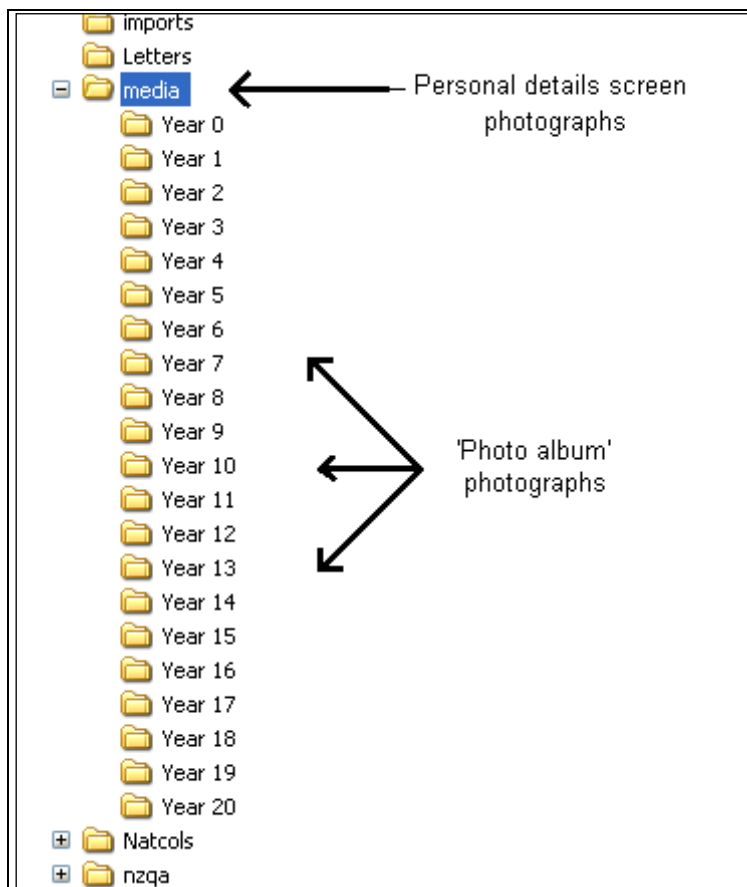


Illustration 8 : Location of photographs

The main screen for the photograph management process is shown below.



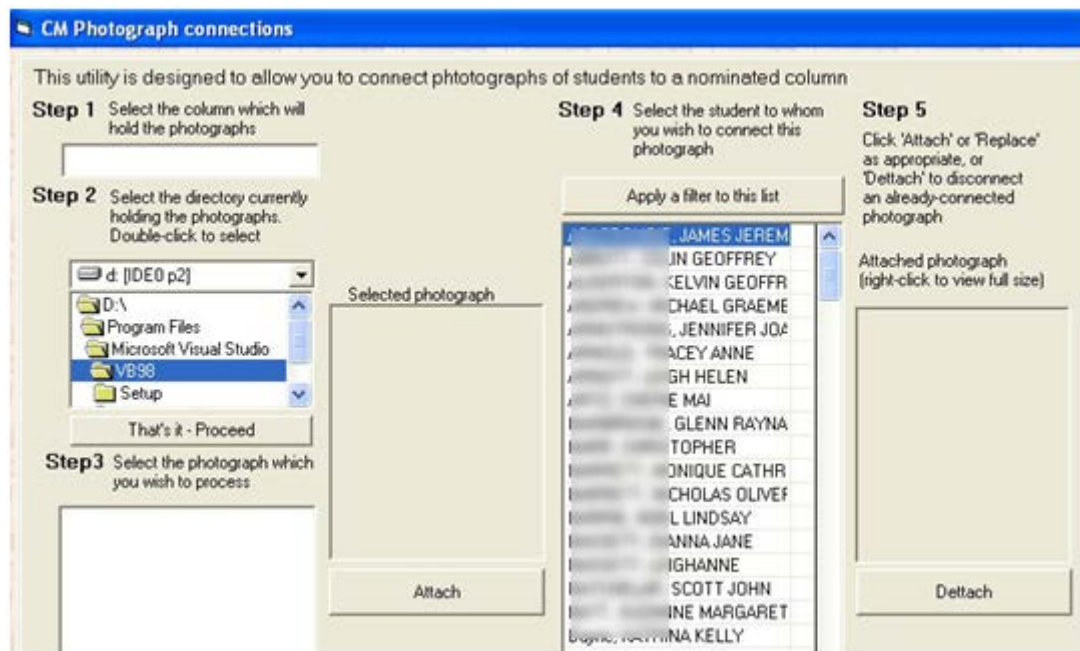


Illustration 9 : The photograph management screen

Step 1 is to identify the column to which you attach the photographs.

We've added a column called 'Page 1 photo' and placed it under 'Student details / Personal'. Select it as shown below.

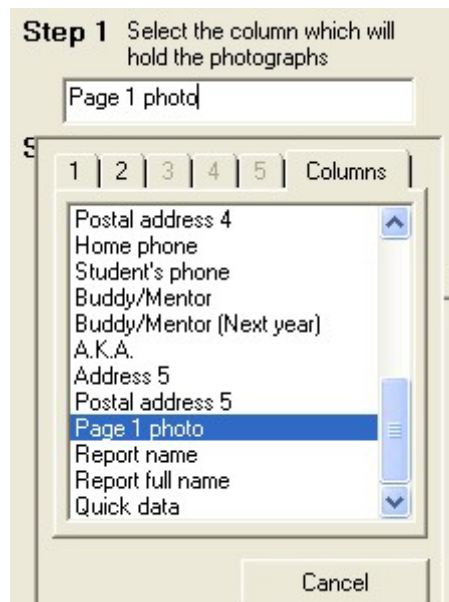


Illustration 10 : The 'Page 1 photo' column

Step 2 - Identify the subdirectory holding the photographs.

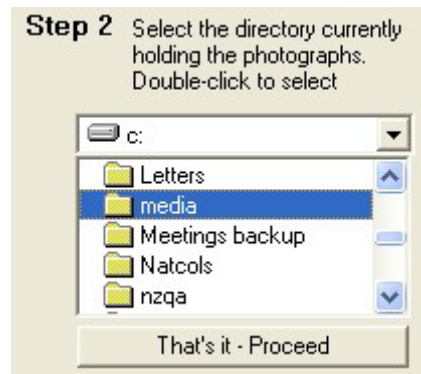


Illustration 11 : Identifying the photograph directory

The names of the photographs in that subdirectory will be listed below and, clicking on one, the selected photograph is displayed to the right of the list.

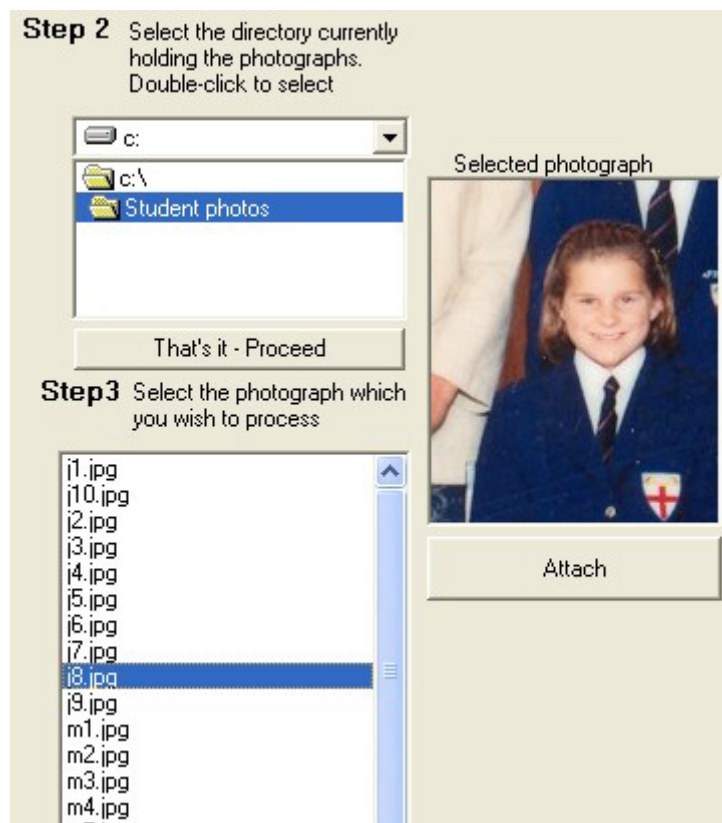


Illustration 12 : Selecting a photograph for attachment

Next, identify the student and find his or her name in the list of students on the right. Click on the student then click 'Attach' to have that photograph's file name stored in the 'Page 1 photo' column for that student.

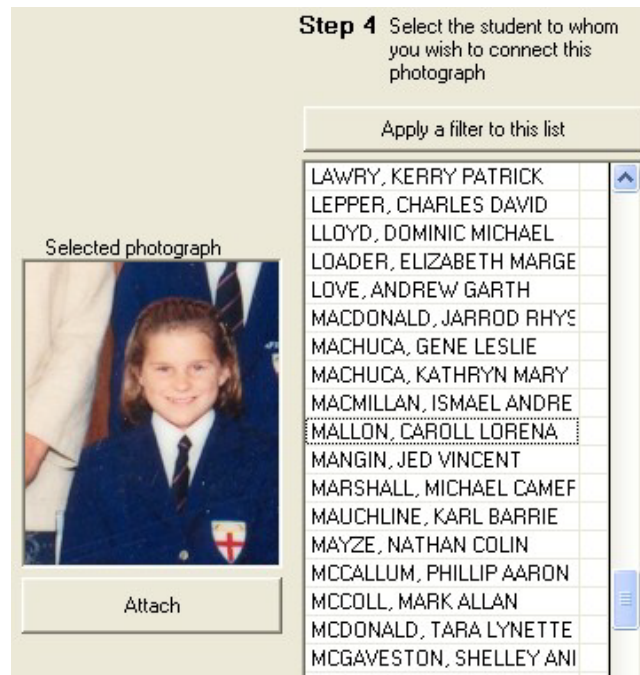


Illustration 13 : Identifying the student's name

The connected photograph will now be displayed on the right hand side of the screen and a tick will be placed alongside the selected student to show that they have a photograph attached.



Illustration 14 : The attached photograph

If an incorrect photograph has been attached then this may be corrected either by selecting and attaching the correct photograph or clicking on the 'Detach' button to have the file name removed from the column.

Clearly this process can be used to attach the names of any multimedia files to any suitably prepared columns.

### Filling a column with the names of photographs

Some schools work with photographers who are able to provide their students' photographs as suitably named files. The most suitable name is, of course, one which uses the students' 'hidden' id number. You can globally connect all photographs in one routine.

**Fill a photograph column with photograph names**

The purpose of this utility is to allow you to fill a column (dedicated to students' photographs) with the names which you intend to use for the photographs. For example, your students' photographs file names might all take the format nnnnn.jpg where nnnnn is the students hidden number.

**Step 1** Select the column which you wish to fill with the generated file names  
Page 1 Photo

**Step 2** Specify the filename which you wish to use  
Contact MUSAC to have further possibilities added to this list

**Step 3** Select the students for whom you wish to create photograph file  
Select Students

**Step 4** Proceed

Selected students :

Illustration 15 : The filling of a column with photograph names

The purpose of this routine is to fill a nominated photograph column with a series of particular student-specific file names - the names of the photographs. If the photographs in question are the 'Page 1' photographs, intended for display on the student's personal details document (i.e. 'Page 1'), it defaults to this column.

**Step 1** Select the column which you wish to fill with the generated file names

Page 1 photo

1	2	3	4	5	Columns
A.K.A.					
Iwi 2					
Iwi 3					
Passport number					
Address 5					
Postal address 5					
Page 1 photo					
Mail to which					
Report name					
Report full name					
Quick data					

Illustration 16 : Selection of the 'Page 1 photo' column

Step 1 - select the destination column - as we did above.

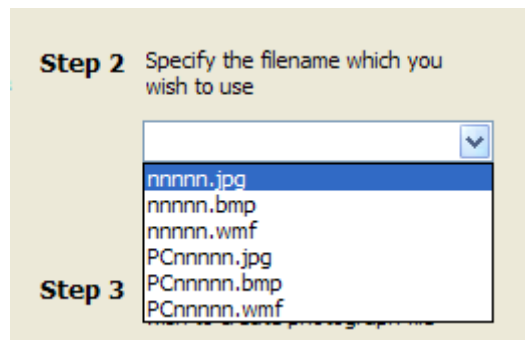


Illustration 17 : Selection of the name format

Step 2 - Select the file name format which you wish to use. We've allowed for the student's hidden number (represented by 'nnnnn' in the list) and allowed for .jpg, .bmp and .wmf files. Please contact MUSAC if you require further alternatives or formats.



Illustration 18 : Selection of the students

Step 3 - Select the students. The usual 'Student selection tool' will appear enabling you to filter the group of students with whom you are concerned.



Illustration 19 : The completed process.

Finally, click "Proceed" and it all will be done, as shown above.

### Moving or copying photographs

The final utility is the ability to move blocks of photographs from one multi-media column to another. Student Manager comes with three pre-designed 'Photo album' screens, whereon you may store the photographs of students as they move through the years. Each year you will need to move the current photographs into their relevant year group column. We've also set up a column for each year of school for this purpose. The 'Move or Copy' process will move or copy both the photographs themselves (from one subdirectory to another) and the names of the photographs (from one data column to another). The screen for this process is shown below.

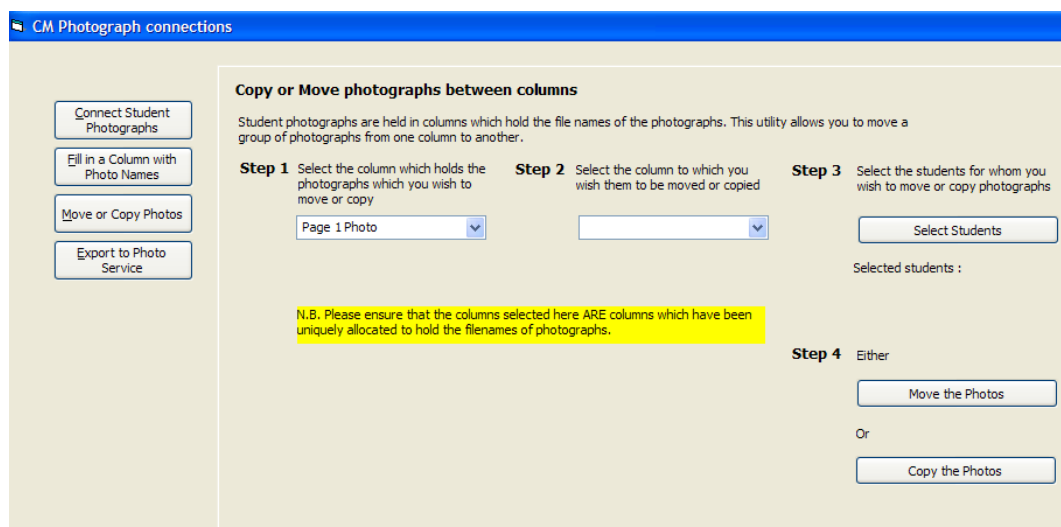


Illustration 20 : The 'Move or copy' screen

In the example shown above, I've selected to copy the 'Page 1 photo' file names FROM 'Page 1 photo' and to put them into the 'Year 6 photo' column found under Personal details / Photographs'

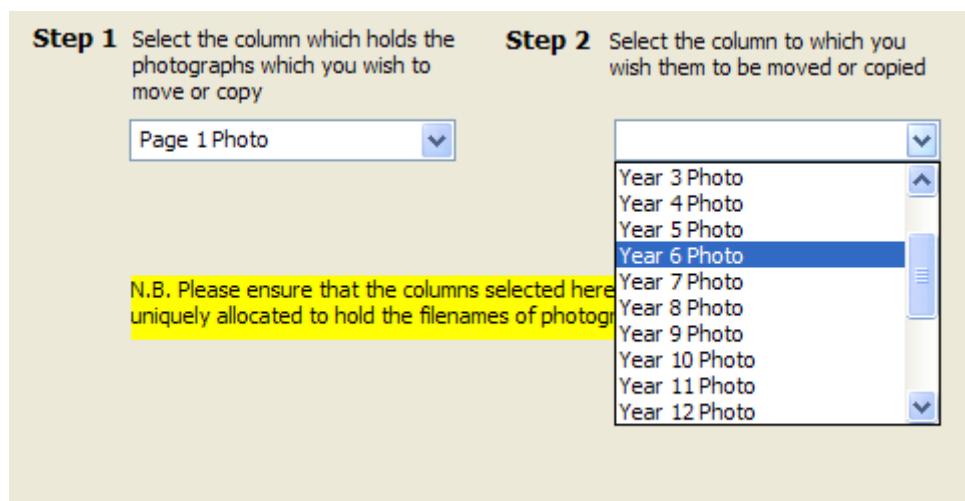


Illustration 21 : Selecting the destination column / subdirectory

My Year 9 students have been selected. Spot the obvious error I'm about to make....

**Step 3** Select the students for whom you wish to move or copy photographs

Select Students

Select students : Year 9 Full time  
Part time

**Step 4** Either

Move the Photos

Or

Copy the Photos

Illustration 22 : Selection of students for whom photographs will be processed

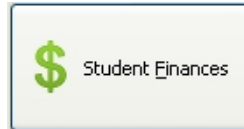
Then, in Step 4, either move or copy the photographs.



## 16 Student Finances

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### 16.1 An overview of student financial processes



The student financial aspects in Student Manager record payments and debts as separate transactions in their own right. Notes can be recorded for credits, discounts and exemptions. Reports and lists can be reviewed and reprinted, and there is a host of other features, including auto-payments.

#### *Accessing the financial aspects*

There are three ways in which the financial aspects of Student Manager may be accessed.

The prime document accessed via 'Edit student data' is titled 'Personal details'. This document lists the main personal details of the student being viewed. A button at the bottom of this document 'Financial Details', will bring up the current transactions for that student.

A second document has been created, titled 'Financial'. This document displays a list of the student's transactions. A button at the top of this document 'Adjust transactions', will also bring up the current transactions for that student.

Finally, by clicking the 'Student Finances' button on the main menu, this will provide access to all of the financial processes. Clicking the 'Transactions' button will bring up the current transactions for a student.

The first chapter will deal with the definition of billable items – those items for which a student may be billed (invoiced), the process of managing an individual student's financial transactions, and the setting of financial defaults.

The next chapter will review in detail all of the individual types of transactions, and the way in which they affect the various financial reports.

The final chapter on this topic will deal with all of the reports and other processes connected with student finances.

The main menu for the financial aspects of Student Manager follows (Figure 1).





Figure 228: The main menu for Student Finances

## 16.2 Billable items

Student Manager includes a full debtor control system for the management of student finances. This involves the ability to bill (invoice) students for certain 'Billable items'. This button accesses the process by which your billable items are specified.

The main part of that screen is as displayed below (Figure 2).

Item	Cost	GST	Status	Detail	Ledger	Group	Subgroup	Budget
Payment received						1	Payments	0
Test	33.00	12.50	All in filter			27		0
School fees (1)JH	?		Siblings	<2		01		0
School (2+)JH	200.00		Siblings	>3		01		0
School fees for 3 terms	100.00		Siblings	>1		01		0
School fees for 2 terms	150.00		Siblings	<2		01		0
School fees - 3 terms 2+	105.00		Siblings	>1		01		0
School JH	300.00		Siblings	2		01		0
9ART - Term 1	5.00		Option	9ART		02		0
9ART - Term 2	5.00		Option	9ART		02		0
9ART - Term 3	5.00		Option	9ART		02		0
9ART - Term 4	5.00		Option	9ART		02		0
10ART - Terms 1-2	10.00		Option	10ART		02		0
10ART - Term 3-4	10.00		Option	10ART		02		0
Art Yr 11	30.00		Option	11ART		02		0
Art Yr 11 - 3 Terms	23.00		Option	11ART		02		0
Art Yr 12	30.00		Option	12ART		02		0
Art Yr 13	30.00		Option	13ART		02		0

Figure 229: Billable items

There is one item at the top which may not be edited. This is 'Payment Received'. This is used during the processing of students' transactions and may not be altered.

By clicking a green column heading an explanation will appear, detailing the contents of the column clicked. The example (Figure 3) shows the description of the 'Status' column.

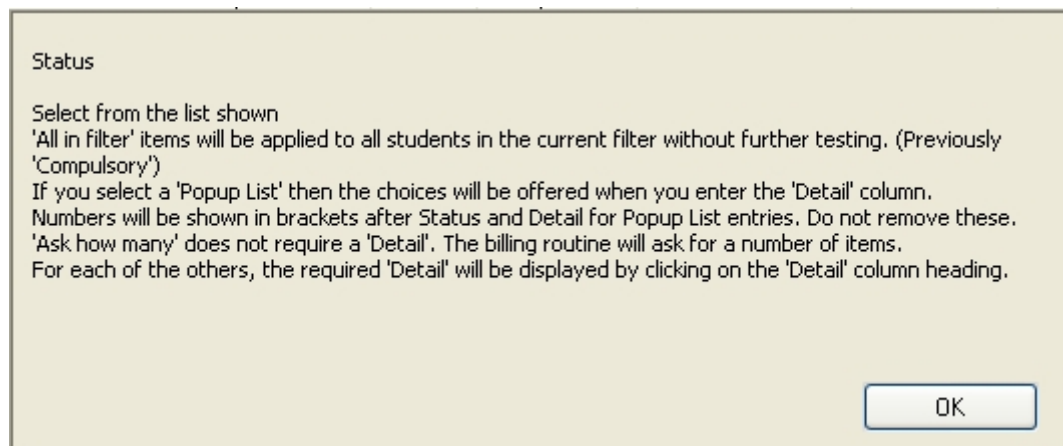


Figure 230: The 'Status' explanation

### Item

The description of an item should not be changed once used, as it is this which is stored on the student's transaction to identify it. If an alteration is needed then, on saving, a message (Figure 4) will be displayed indicating that all of the current financial transactions on file will have to be checked to alter them to reflect the change. This does not take long, but is not a process which should be done regularly.

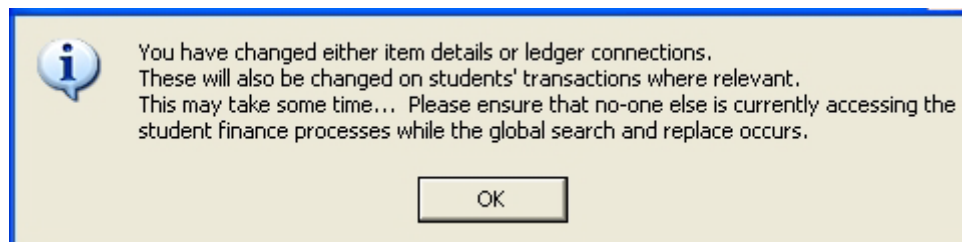


Figure 231: Changed item

Billable items MUST all have unique names, as this can cause issues when creating reports etc.

### Cost

This is the total cost of the item, including any G.S.T. The cost entry can be a question mark. If doing so, when a student is billed (invoiced), the program will stop and ask for the specified amount. A typical item which has a question mark is 'Stationery'(Figure 5).

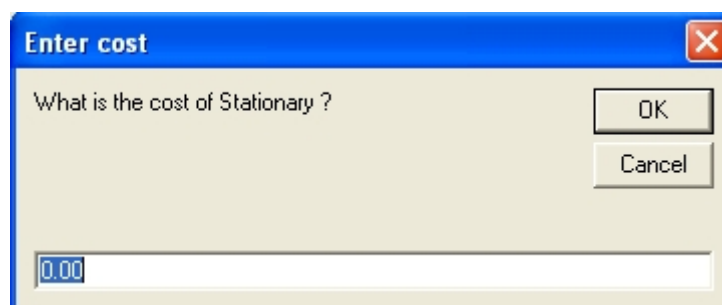


Figure 232: Cost = Question Mark

### GST

Enter the amount of GST as a percentage. This is almost invariably either zero (blank) or 15 (October 2010 thereafter). Do NOT add the % sign.

## Status

If you click in the 'Status' column then the following pop-up menu will appear.

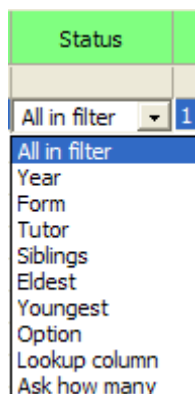


Figure 233: Status possibilities

This is a description of each:

- 1 All in filter - Every student in the current filter will be billed (invoiced) this item.
- 2 Year - Only students in the year specified in the 'Details' column will be billed (invoiced).
- 3 The next two field names are your school settings, eg. commonly in primary schools 'class' and 'room', and for secondaries, 'form' and 'tutor' etc, which are user named fields.
- 4 Siblings - Possible entries in the 'Details' column are, = 1, > 1, < 2 etc. For example if =1 is specified then only students with one other family member will be billed (invoiced).
- 5 Eldest - Only those who are specified as eldest in their family will be billed (invoiced).
- 6 Youngest - Only those who are specified as being the youngest in their family will be billed (invoiced).
- 7 Option - Only those students taking the option specified in the 'Details' column will be billed (invoiced). Options may be a subject only eg. 12MAT (in which case all students taking 12MAT will be billed (invoiced)) or have a teacher code attached eg. 12MATBT (in which case only 12MAT students taken by BT will be billed (invoiced)).
- 8 Lookup column - Should you select 'Lookup column' then nothing further will happen until you click in the 'Detail' column, at which point the screen below (Figures 7) will appear.
- 9 Ask how many - The program will stop to ask you how many eg. broken windows or haircuts the student is to be billed (invoiced) for. The number entered will be multiplied by the item cost to determine the full amount.

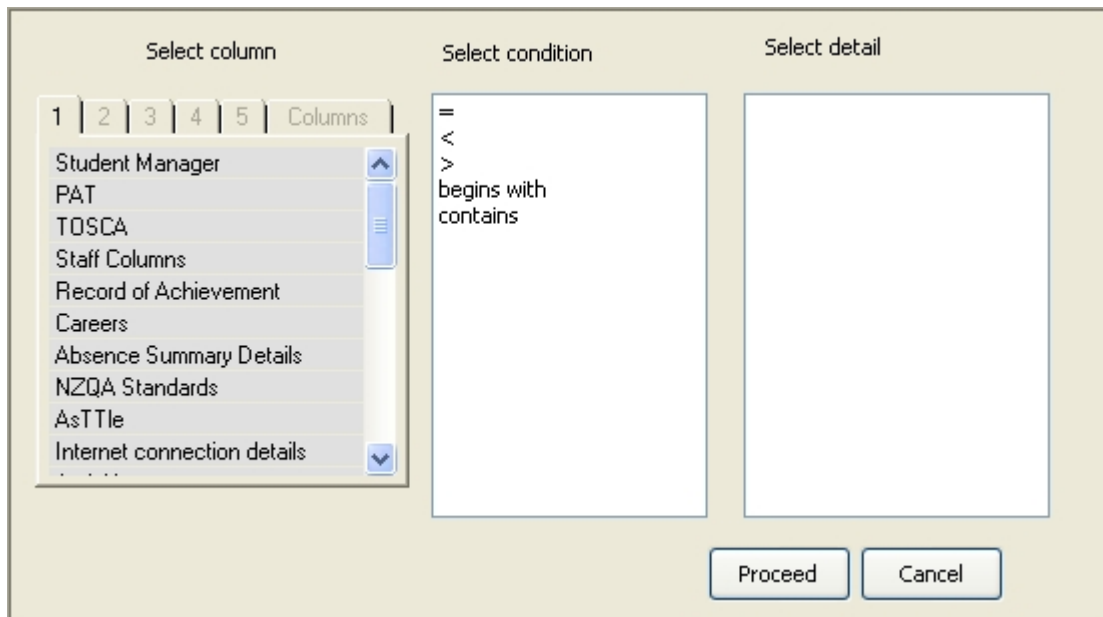


Figure 234: Specifying a 'Lookup' condition

On the left is the MUSAC 'Column picker' via which a selection of any column in the database can be made. In the example, Student Manager/Personal/ Type were clicked to reveal the columns under this category.

In the centre column the '=' sign was selected and from the right hand list 'International Fee-paying student'.

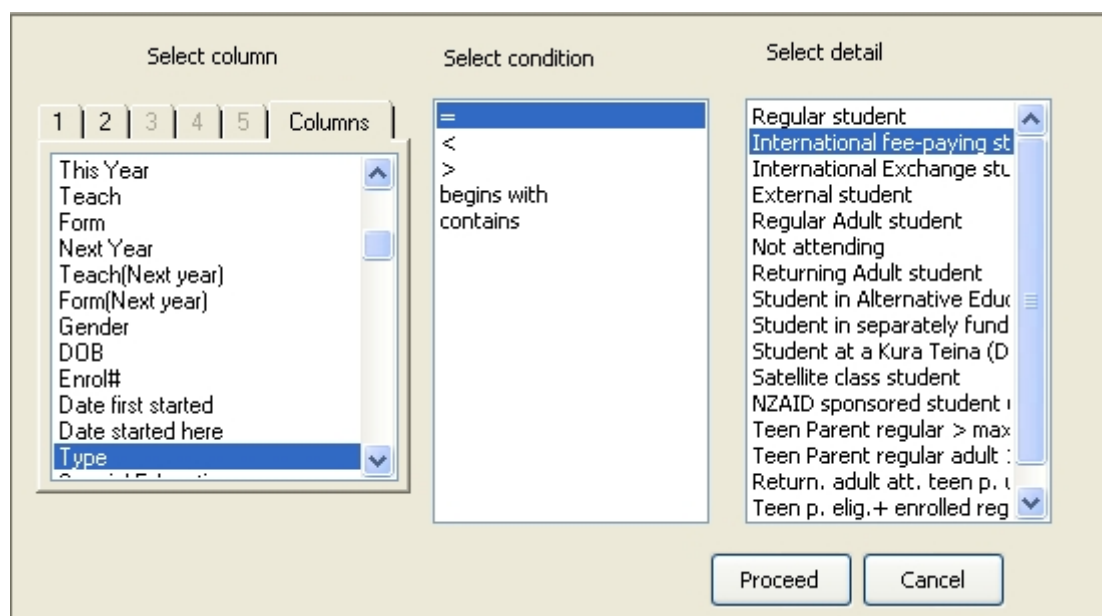


Figure 235: A completed condition

On clicking 'Proceed' the status column will appear as shown below.

Status	Detail
Type(27)	=International fee-pi

Figure 236: A completed condition

The '(27)' following Type indicates to the program that pop-up file number 27 has been selected.

### Detail

The contents of this column were covered in the preceding explanation, but below is a screen view which occurs if you click in the 'Detail' column heading.

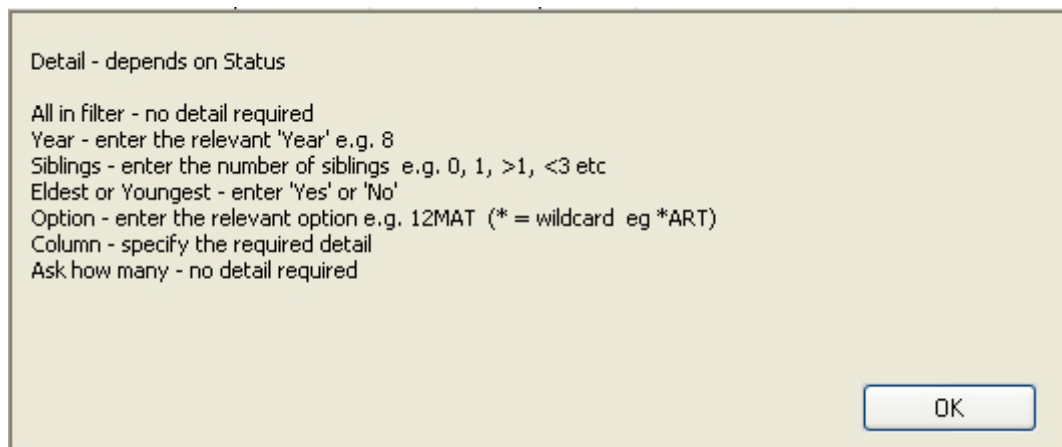


Figure 237: The 'Detail' explanation

### Ledger

This is where user specified Ledger numbers for items are attached. Every item MUST have a ledger number, even if they are not linking to the MUSAC Accounts package. If doing so then the relevant ledger codes must be used from that package.

### Group

It is possible to group several items with different ledger numbers into a group for the purpose of doing financial analysis.

## Subgroup

Just as different ledger numbers can be gathered together in a group, a similar subdivide can be made of items with the SAME ledger number into Subgroups for the purpose of financial analysis.

## Budget

It is also possible to specify a budget for each item, again allowing financial analysis to report on the amount received as a percentage of the budgeted income, etc.

Other buttons on the Billable Items screen (Figure 11) include:

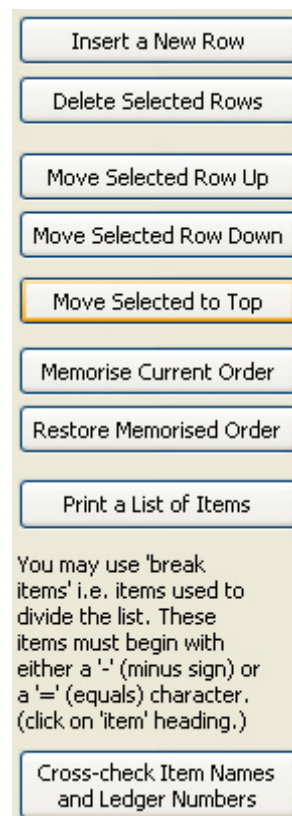


Figure 238: The side bar buttons

To INSERT a new billable item between two others, select the item, which currently occupies the position, and click the 'Insert a New Row' button.

To REMOVE one or more unused items, select the item(s) and click the 'Delete Selected rows'. Only remove items which have not been applied to students. The following screen (Figure 12) will appear if attempting to remove billed (invoiced) items.

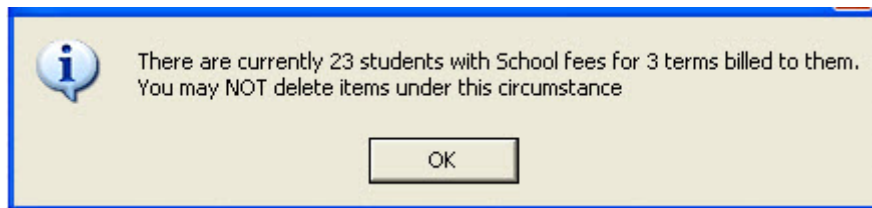


Figure 239: Delete Selected Rows

The 'Move Selected Row Up' and 'Move Selected Row Down', are self explanatory.

If you wish to TEMPORARILY move one or more items to the top of the list then select them and click the 'Move Selected to Top' button. Clicking save as you exit and the message below (Figure 13) will appear. The item will now be at the top of the list when billing (invoicing) students. This process works well with items that are only billed (invoiced) at certain times of the year.

The idea is that those schools with large lists of items can then search more efficiently for items when billing (invoicing). Just move the item to the top and don't memorise the current order. Later, when the trips are over, you can restore the memorised order.

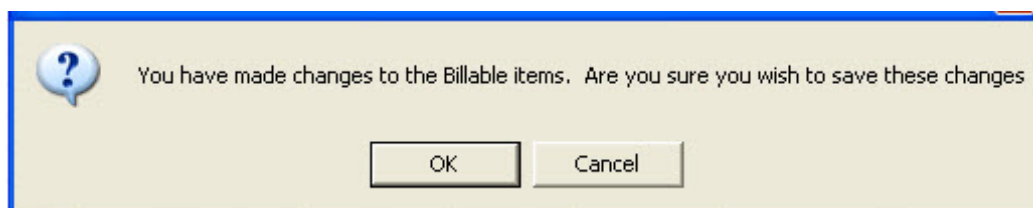


Figure 240: Move Selected to Top

The 'Memorise Current Order' button is used if you wish to make the change PERMANENT. The message below (Figure 14) will appear. Then, at a later date, having moved others to the top temporarily, clicking on the 'Restore memorised order' will return the Billable Items list to the original order.

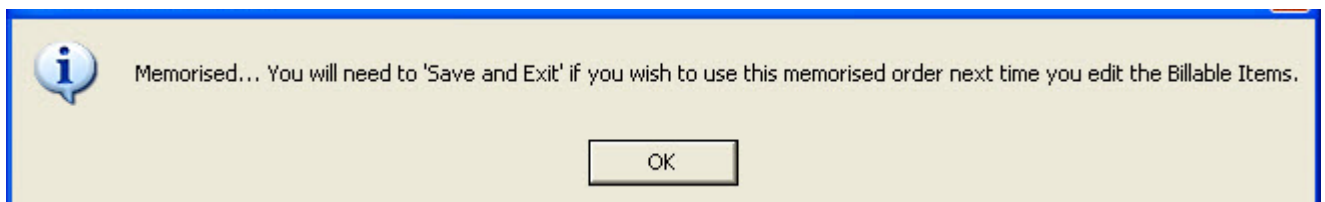


Figure 241: Memorise Current Order

By clicking 'Print a List of Items' a list can be printed to allow a review of your current billable items and changes can be made if necessary on paper before changing them in the program.

The last button, labelled 'Cross check item names and ledger numbers' performs a number of checks, including searching for those billable items with spaces in front of their names (leading to



'lost items'). It memorises the existing items, then cross checks all of the transactions in the database and in the audit trail, to see that the correct ledger number is attached to each item. It also 'adds back' any unrecognised items on students ('lost items').

The following screen shot (Figure 15) shows the check screen. A backup of the audit trail is made at the time of checking and, if a previous backup is found to exist, then the green button, allowing you to restore a backup will be visible.

If items have duplicate names (which is perfectly acceptable) AND are tagged to different ledger numbers then, if this item is found in the database tagged to other than a valid ledger number, then the fault will be corrected by reattaching it to the FIRST of the valid ledger numbers. (This is explained via a message which appears if the checking process does find that you have used the same item name more than once.

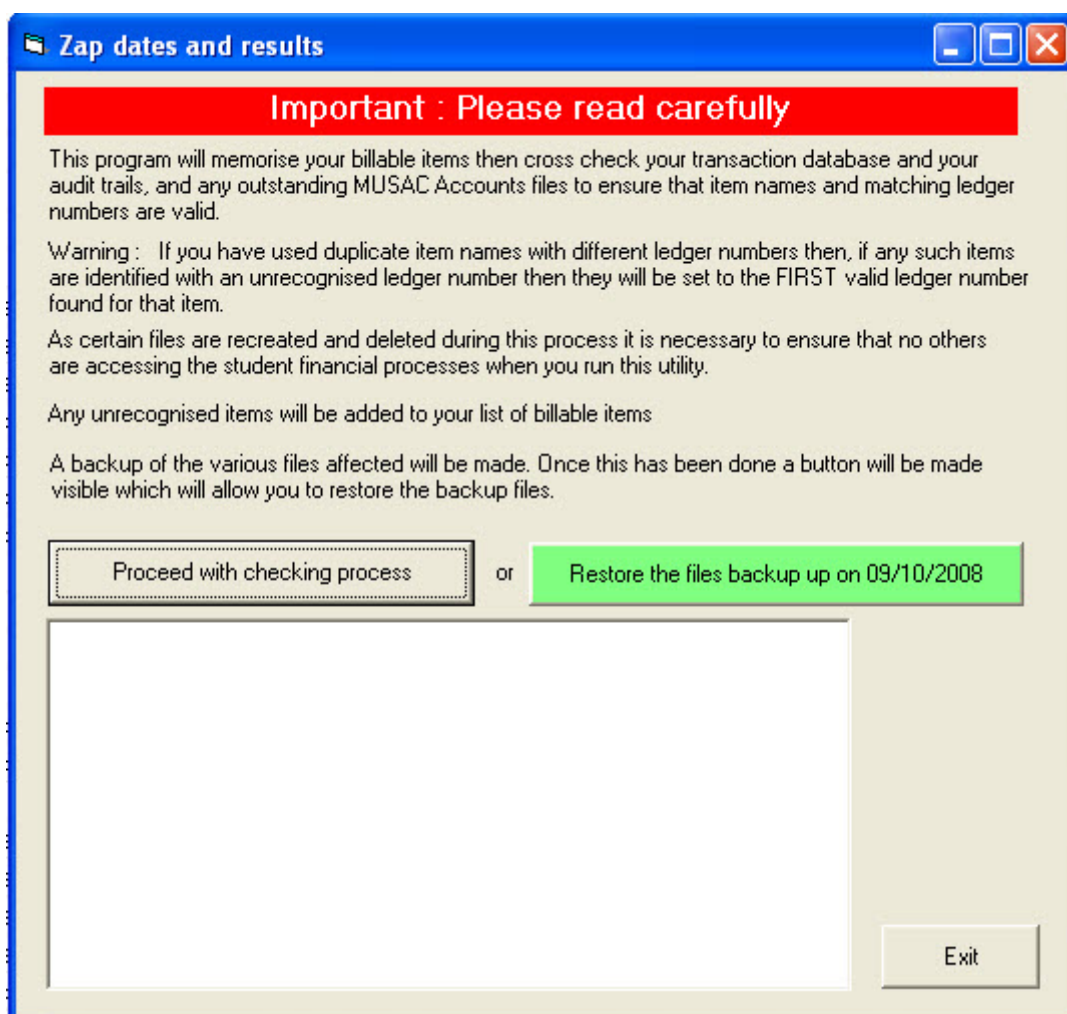


Figure 15: The 'Cross check' utility

### 16.3 Individual student's transactions

The major part of this screen is devoted to the display of the student's transactions.

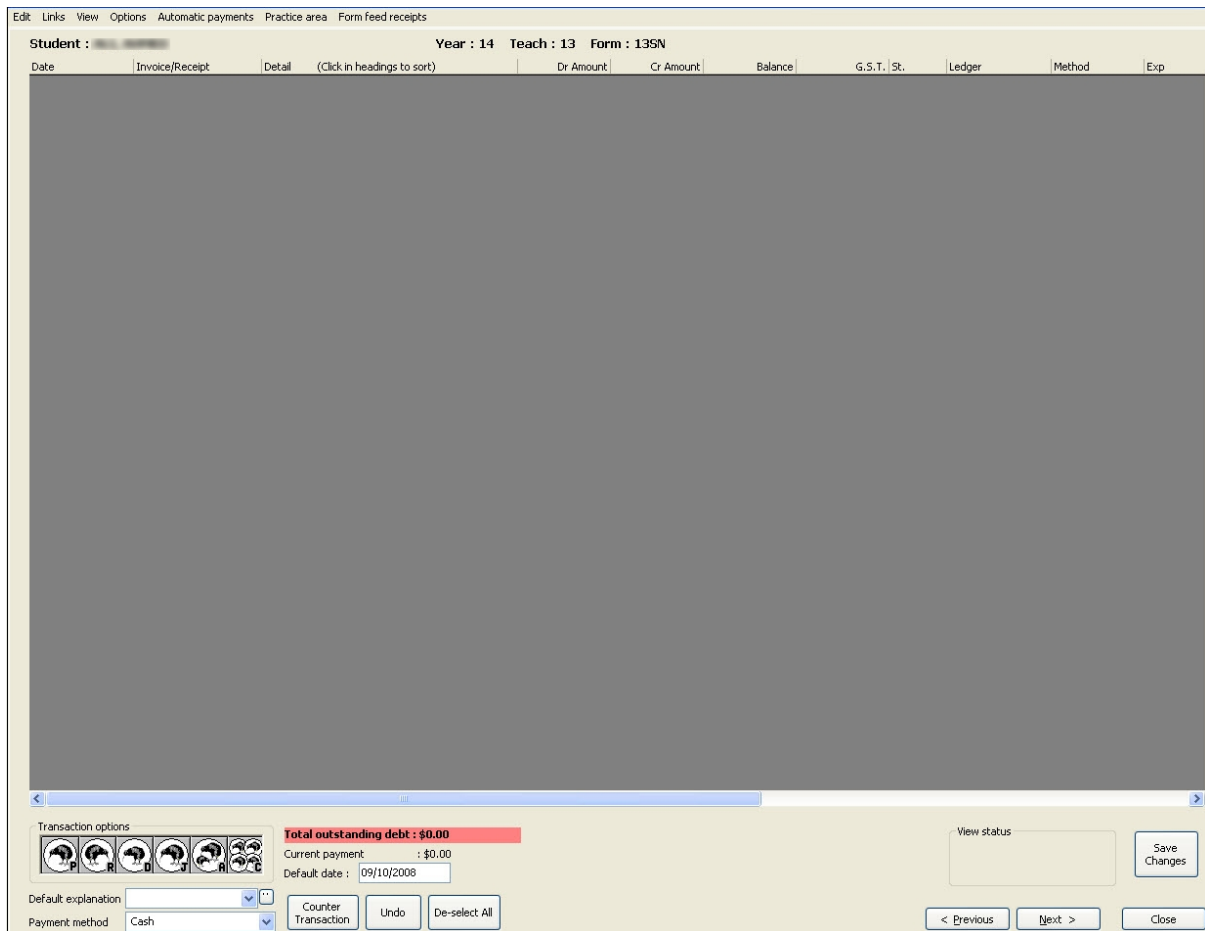


Figure 242: The individual student's transactions screen

At the top of the screen are various menu options, and at the bottom of the screen are a variety of buttons used for financial transactions.

At the top of the screen, one of the menu items is labeled 'Practice area' (Figure 16). Turning this area 'On', by clicking the relevant menu item, nothing will be saved back to the database and experiments can be done with the various buttons and processes available.

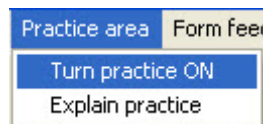


Figure 243: Turning practice on

Ensure that the practice area is turned 'Off' when finished.

Various ways of dealing with financial transactions:

### Counter transactions

Click on the 'Counter Transaction' button at the bottom of the Transaction screen. The window will display a list of the school's 'Billable items' (Figure 17). See previous sections for more information on Billable Items.

**Select the required items**      Hold Ctrl to multi-select

Detail	Cost
Testing	33.00
9ART - Term 1	5.00
9ART - Term 2	5.00
9ART -Term 3	5.00
9ART - Term 4	5.00
School (2+)JH	200.00
School fees for 3 terms	100.00
School fees for 2 terms	150.00
School fees - 3 terms 2+	105.00
School JH	300.00
10ART - Terms 1-2	10.00
10ART - Term 3-4	10.00
Art Yr 11	30.00
Art Yr 11 - 3 Terms	23.00
Art Yr 12	30.00
Art Yr 13	30.00
Art for 3 terms	23.00
Art for 2 Terms	15.00
Photography Yr 12	30.00
Photography Materials	120.00

Number of items selected : 1

H = Teach  
 V = Form  
 S = Sibling count  
 E = Eldests only  
 Y = Youngests only  
 O = Option class  
 L = Popup entry  
 A = Ask how many

Figure 244: Selection of items

Select the item(s) for which a student is paying and click 'OK'. (If processing a few students paying for the same item(s) click 'Remember these' to save having to reselect them for each student).

The following screen (Figure 18) will list the selected item(s) and will display the total amount of the transaction. Alterations can be made to the transaction amount depending on the situation. Click whether the item has been paid or not by clicking the appropriate button.

**Counter Transaction Confirmation**

Item	Cost
Testing	33.00
9ART - Term 1	5.00

Transaction total:

This amount is:  Paid  Unpaid

Either:  Print receipt  or don't print

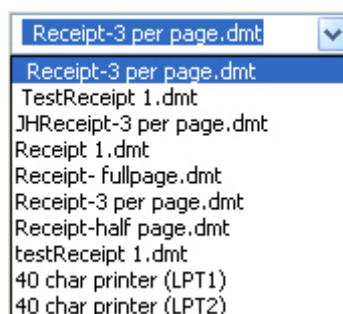
Receipt:

Method:

Figure 245: Payment details

If paid, then a receipt can be print immediately or not. A unique receipt number will be allocated to the payment as soon as the transaction is saved.

If printing a receipt then select the receipt design from the drop-down (Figure 19). For more information on Receipt design refer to chapter

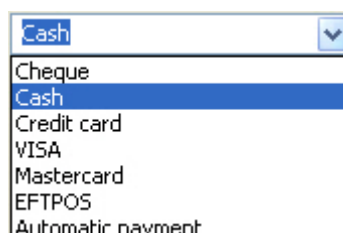


Receipt-3 per page.dmt

- Receipt-3 per page.dmt
- TestReceipt 1.dmt
- JHReceipt-3 per page.dmt
- Receipt 1.dmt
- Receipt- fullpage.dmt
- Receipt-3 per page.dmt
- Receipt-half page.dmt
- testReceipt 1.dmt
- 40 char printer (LPT1)
- 40 char printer (LPT2)

Figure 246: Selection of receipt design

Select the method of payment from the drop-down (Figure 20).



Cash

- Cheque
- Cash
- Credit card
- VISA
- Mastercard
- EFTPOS
- Automatic payment

Figure 247: Selection of payment method

Click 'Proceed'. The transaction screen will now be displayed with the transaction showing.

**Note:** at this stage the transactions have not been written to the database. This will not happen until the 'Save changes' button is clicked.

If the item(s) were unpaid they will be displayed on the screen with the amount of the debt showing in the 'Dr Amount' column. The same debit balance will show in the 'Balance' column also. The 'Status' column will display 'N' – not paid (Figure 21).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
09/10/2008	Counter2	Testing	33.00		33.00 Dr	3.67	N
09/10/2008	Counter2	9ART - Term 1	5.00		5.00 Dr		N

Figure 21: The unpaid transaction display

Item(s) that are paid will have two transactions (or legs of the same transaction) displayed. The first will be the debt leg – with a 'Status' 'Y' – paid – and no 'Balance'. The second will be the payment leg. This will have a status of 'A' indicating that the entire amount of the payment has been allocated, and there will consequently also be no entry in the 'Balance' column (Figure 22).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
09/10/2008	Counter	Testing	33.00			3.67	Y
09/10/2008	Counter	9ART - Term 1	5.00				Y
09/10/2008	6896	Payment received		38.00		3.67	A

Figure 22: The paid transaction display

If printing a receipt then the 'Invoice/Receipt' column will indicate 'Next receipt', the receipt number is not issued until the receipt is printed, that is when clicking the 'Save Changes' button (Figure 23) for this student's transactions. If not printing receipts, a receipt number will be allocated anyway to allow it to be printed off at a later date if required. Receipt numbers can be manually added, see chapter 2.4 for more information on this.



Figure 23: Save Changes button

There are four currency columns on the transaction screen:

Dr Amount	Cr Amount	Balance	G.S.T.
33.00		23.00 Dr	3.67
5.00		5.00 Dr	
	10.00		1.11
	10.00	10.00 Cr	

Figure 24: The currency columns

- 1 The Dr Amount. This column displays the total debt amount of the transaction in question.
- 2 The CR Amount. This column will display the total amount of the payment (or credit) involved in the transaction. No transaction will have entries in both of these columns.

- 3 The Balance column. This column will display any unpaid or unallocated balances relating to transactions. A debt balance indicates that the debt has yet to be paid in full. A credit balance indicates that the payment has an unallocated balance which may be used to pay debts.
- 4 The GST column indicates the GST included in the transaction. There will be no GST on unallocated credit amounts, as the GST on such a transaction is not determined until the credit is used to pay a debt.

If you attempt to process any transactions prior to saving the changes you will get the message below (Figure 25). Click 'Ok', and then click 'Save Changes'

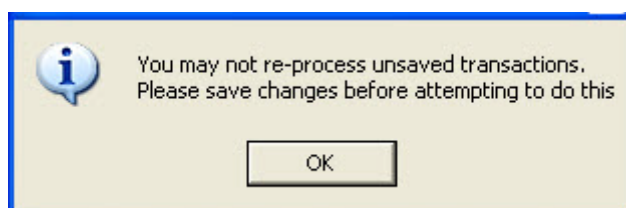


Figure 25: Save before payments

If a mistake has been made and 'Save Changes' hasn't been clicked, there are a few ways to correct this.

- 1 Click 'Undo' at the bottom of the screen.
- 2 Click 'Edit' menu at the top of the screen, followed by 'Undo'
- 3 Hold down the Control key and click 'Z' (Ctrl-Z)
- 4 Move to another student and DON'T save changes on exit.

### *Instant payment of debts*

Double-click the item name in the Detail column of an unpaid debt. A small window will pop up, asking whether or not you wish to print a receipt (Figure 27). If so the default settings (Refer to chapter 2.4) will be used. The screen will instantly return to the transaction screen and the new entry will show. At the same time the status of the previously unpaid debt will change to 'Y' – paid – and the debit balance will be removed.

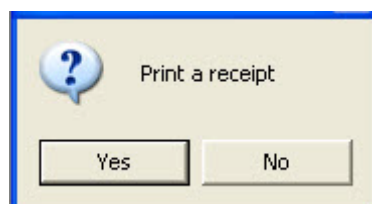


Figure27: Print a Receipt

### *Other payments*

At the bottom of the screen is a row of small kiwi pictures, representing six transaction processes (Figure 28).



Figure 28: Transaction Buttons

**P = Payment**



Figure 29: Payment Kiwi

To pay an unpaid debt, highlight the debt, (to multi highlight hold the Control key). Click 'P' (Figure 29). The Confirmation of Payment or Part-Payment screen will appear (Figure 30). Changes can be made to the amount being paid if required, if LESS than the total amount one or more debts will remain either unpaid or partially paid. If MORE than the full amount then the payment leg will retain a credit balance, available for the payment of other debts in the future.

**Confirmation of Payment or Part-payment**

**Items paid**

Item	Cost	GST	Ledger
Testing	33.00	3.67	27
9ART - Term 1	5.00		02

Transaction total

Payment received

Payment balance

If the payment made covers more than the amount due then the surplus will be retained as an unallocated balance against item :

Either  Print receipt or  don't print

Method

Figure 30: Confirmation of Payment

Click 'Proceed' to have the transaction(s) processed and return to the transaction screen. The single payment transaction will appear with or without a credit balance depending on whether or not more than the full amount due was paid. At the same time the debit balances of the debts and their statuses will be altered suitably – depending again on what proportion of the amount due was paid.

## Advance payments

To make an advance payment which will create a Credit leg, click 'P' without selecting any items. If items are selected, click them again to de-select or click 'De-select all' at the bottom of the screen (Figure 31).

The Confirmation of Payment or Part-payment screen will appear as in (Figure 30), less the debit item(s). Enter the amount of the payment and method. Choose to print a receipt or not. Click 'Proceed'. On returning to the transaction screen the new transaction will appear with the amount showing in the 'Cr' column and the 'Status' of the payment will show 'U' (Unallocated) (Figure 32).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T. St.
10/10/2008	6902	Payment received		100.00	100.00 Cr	U

Figure32: Advance Payment

## R = Refund



Figure 33: Refund Kiwi

There are two types of transactions which may be refunded:

1. Previously paid debts
2. Payments with credit balances

Refunding a paid debt will create a credit leg, corresponding to the amount of the refund (Figure 34 – 35). The credit can then be allocated to other debts.



### Refund of payments

You have selected the following paid items to be refunded (either in full or in part)

Date	Item	Amount Paid	Refund
09-Oct-2008	Testing	33.00	33.00

The refund(s) listed have been :

Not paid out  
 Paid out

Either  Print credit  
 Or don't print

Credit note

Figure 34: Refund Not Paid Out

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
09-Oct-2008	Counter	Testing	33.00			3.67	Y
09-Oct-2008	Counter	9ART - Term 1	5.00				Y
09-Oct-2008	6897	Payment received		38.00		3.67	A
10/10/2008	CN14	Refund		33.00	33.00 Cr		U

Figure 35: Refund Transaction Not Paid Out

If paying out the refund, then a further leg is generated for the payout itself – removing the credit (shown below), the amount can be altered if required.

### Refund of payments

You have selected the following paid items to be refunded (either in full or in part)

Date	Item	Amount Paid	Refund
10/10/2008	Testing	33.00	33.00

The refund(s) listed have been :

Not paid out  
 Paid out

Method 


Paid by cheque number :

Either 


Credit note

Or don't print

Figure 36: Refund Paid Out

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
10/10/2008	Counter	Testing	33.00			3.67	Y
10/10/2008	Counter	9ART - Term 1	5.00		5.00 Dr		N
10/10/2008	6903	Payment received		33.00		3.67	A
10/10/2008	CN15	Refund		33.00			A
10/10/2008	Refund	Refund	33.00			3.67	Y

Figure 37: Refund Transaction Paid Out

If printing a credit note, select it from the drop-down. Designing a Credit Note is covered

Refunding a credit is done in the same manner as above, however the only option available is 'Paid out' (Figure 38) and Payment Received is highlighted instead of the debt before clicking the 'R'.

**Refund of payments**

You have selected the following paid items to be refunded (either in full or in part)

Date	Item	Amount Paid	Refund
10-Oct-2008	Payment received	100.00	100.00

The refund(s) listed have been :

Not paid out  
 Paid out

Method:

Either  Print credit  
 Or  don't print

Figure 38: Credit Paid Out

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
10-Oct-2008	6902	Payment received		100.00			A
10/10/2008	Refund	Refund	100.00				Y

Figure 39: Credit Transaction Paid Out

D = Reduction of debt



Figure 40: Reduction Kiwi

To reduce a student's debt, via discount or exemption, Click 'D' (Figure 40). While there are subtle differences between these as far as intent is concerned, there is no difference in effect. Both result in the reduction of the balance due on the debt.

Select the debt(s), click 'D'. Against each debt indicate the amount by which it is to be reduced, either by entering the amount of the Reduction or the Percent of the full amount (Figure 41).

**Confirmation of debt reduction details**

**Step 1** If necessary, change the amounts in the right hand column below

Date	Item	Balance due	Reduction	Percent
13/10/2008	Testing	33.00	16.50	50
13/10/2008	Testing	33.00	10.00	30.3

**Step 2** Enter your explanation for the reduction(s)

e.g Paid on time.

**Step 3** Select the process for the reduction

Discount(s)      Exemption(s)

Cancel

Figure 41: Reduction of debt

An explanation for the reduction needs to be entered (Step 2) before clicking the relevant reduction method (Discount/Exemption). The explanation needs to be easily interpreted by parents as it does show up on statements. Refer to chapter ? for more information on Statements.

Click the reduction method and the transaction screen will appear, showing the transaction (Figure 42).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T. St.	Ledger	Method	Exp
10/10/2008	Counter	Testing	33.00		16.50 Dr	3.67 N		27	
10/10/2008	Counter	9ART - Term 1	5.00		5.00 Dr	N		02	
10/10/2008	Note	Testing		16.50		1.84 A		27 Discount	eg. Paid on

Figure 42: Reduction of Debt Transaction

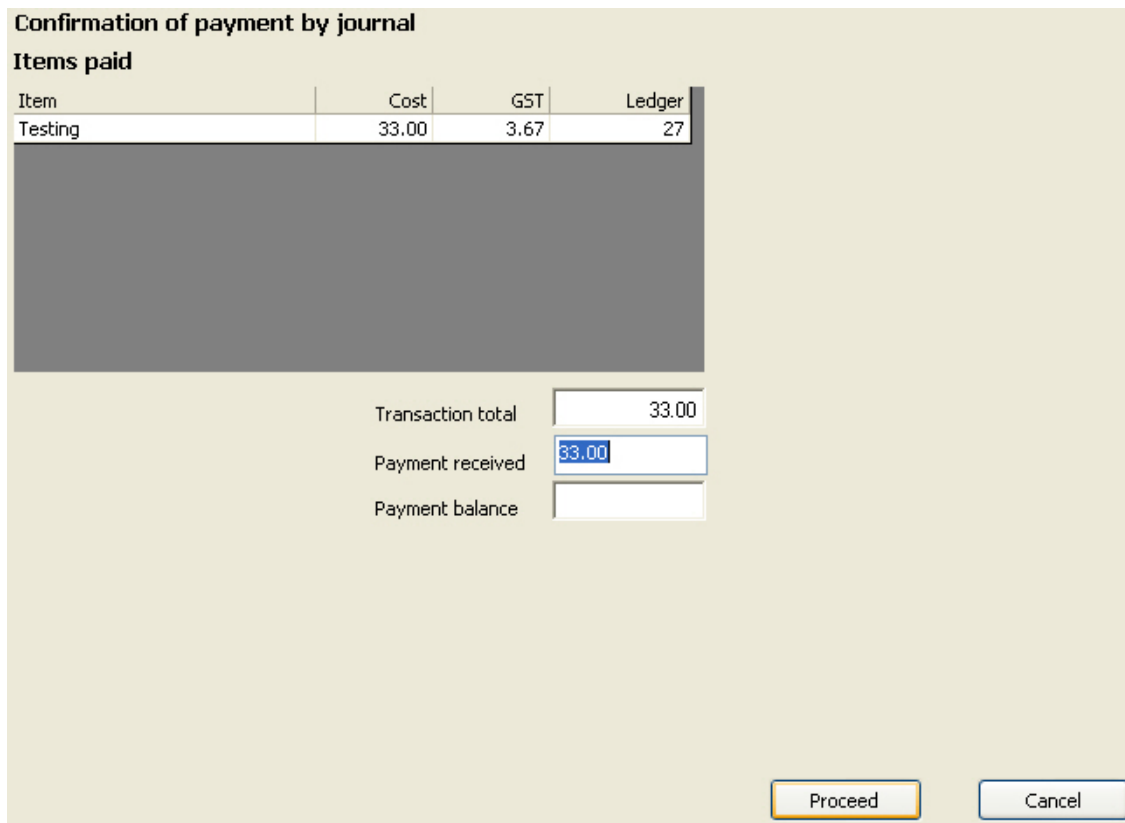
J = Payment by Journal



Figure 43: Journal Kiwi

Journal payments reduce a student's debt via a payment other than those from a student, eg: Principals acct or internal transfer. Receipts are not printed for Journal payments.

Highlight the debt, Click 'J'. Enter the amount to be paid, Click 'Proceed' (Figure 44).



**Confirmation of payment by journal**

**Items paid**

Item	Cost	GST	Ledger
Testing	33.00	3.67	27

Transaction total: 33.00

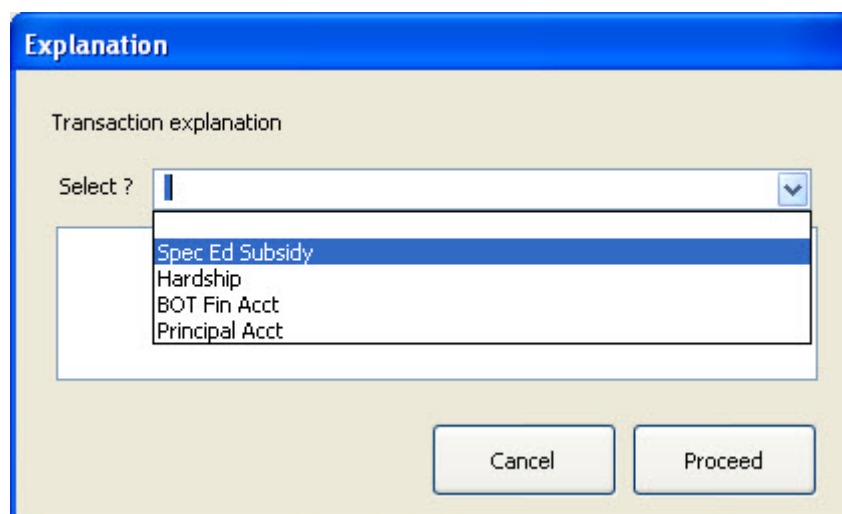
Payment received: 33.00

Payment balance:

Proceed Cancel

Figure 44: Journal details

An explanation is required for a Journal payment. Either select from the drop – down, type in the box or both. Click 'Proceed' (Figure 45). The Transaction will now show on the transaction page along with the Explanation (Figure 46).



**Explanation**

Transaction explanation

Select ?

- Spec Ed Subsidy
- Hardship
- BOT Fin Acct
- Principal Acct

Cancel Proceed

Figure 45: Entry of the explanation

Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T. St.	Ledger	Method	Exp
Counter	Testing	33.00			3.67 Y	27		
Counter	Testing	33.00		33.00 Dr	3.67 N	27		
Journal001	Payment received		33.00		3.67 J		1 Journal	Spec Ed Su

Figure 46: The transaction displayed

A = Allocation of credits to debts



Figure 47: Allocation Kiwi

This process allocates a student’s credit balance from one transaction, where the Status column shows a ‘U’, to pay the debit balance of another, Status ‘N’.

Select the credit balance(s) and debit balance(s) involved (Figure 48), Click ‘A’.

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
14-Oct-2008	Counter	Testing	33.00			3.67	Y
14-Oct-2008	Counter	Testing 2	50.00		50.00 Dr		N
14-Oct-2008	6909	Payment received		33.00		3.67	A
14/10/2008	6910	Payment received		100.00	100.00 Cr		U

Figure 48: Selection of debts and credits

**Allocation of payments to unpaid debts**

The following available balances ...

Date	Item	Balance available
14/10/2008	Payment received	100.00

... will be used in payment of :

Date	Item	Unpaid balance	G.S.T.	Allocate
14-Oct-2008	Testing 2	50.00		50.00

\* Priority order is the order which debts are to be paid via autopayments

Figure 49: Confirmation of details

The above window (Figure 49) will show how much of the credit will go on the debt. If there is more than one debt, the Allocate figure can be prioritised if the credit amount is not enough to cover all debts in full.

The below (Figure 50), shows a Credit of \$100 allocated to a Debt of \$50. It now leaves a credit balance of \$50 to be allocated to any further debts.

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
14-Oct-2008	Counter	Testing	33.00			3.67	Y
14-Oct-2008	Counter	Testing 2	50.00				Y
14-Oct-2008	6909	Payment received		33.00		3.67	A
14-Oct-2008	6910	Payment received		100.00	50.00 Cr		U

Figure 50: The resulting transactions

C = Payment of all outstanding debts in full



Figure 51: Complete Kiwi

Clicking 'C' will pay all debts without having to highlight them first. This will pull in any credits the student may have also, and the following message will show if this is the case (Figure 52).

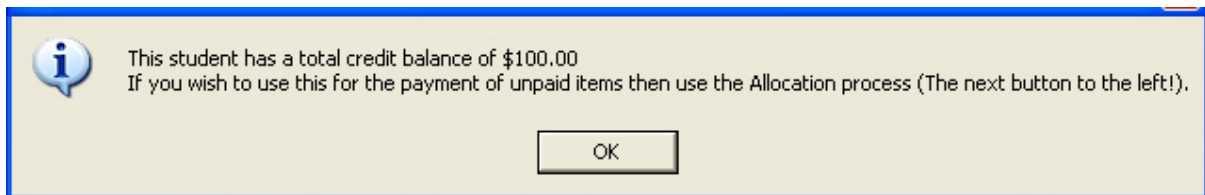


Figure 52: Use of credit balances

Click 'OK' and the following screen will appear (Figure 53).

**Confirmation of Payment or Part-payment**

**Items paid**

Item	Cost	GST	Ledger
Testing	33.00	3.67	27
Testing 2	50.00		

Transaction total

Payment received

Payment balance

If the payment made covers more than the amount due then the surplus will be retained as an unallocated balance against item :

Either  Print receipt or  don't print

Method

Figure 53: Confirmation of payment

Click 'Proceed' to continue with the transaction and go back to the transaction page, where it will now show.

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
14-Oct-2008	Counter	Testing	33.00				3.67 Y
14-Oct-2008	Counter	Testing 2	50.00				Y
14-Oct-2008	6912	Payment received		100.00	100.00 Cr		U
14-Oct-2008	6913	Payment received		83.00			3.67 A

Figure 54: Transaction screen

In the tool bar of a student's transaction page there are further buttons to help process transactions.

## Tools Menu

### Edit

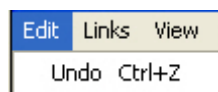


Figure 55: The Edit menu

Edit/ Undo, is used just as the 'Undo' button at the bottom of the transactions page. If 'Save Changes' has not been clicked any transactions will be restored to their original state.

### Links

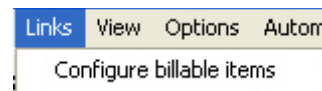


Figure 56: The Links menu

Links/Configure billable items, is direct access to your Billable items page.

### View

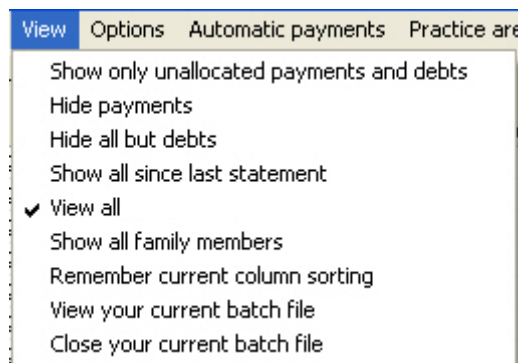


Figure 57: The View menu

The first five are self explanatory, the default setting is 'View All'.

- 1 Show only unallocated payments and debts
- 2 Hide payments
- 3 Hide all but debts
- 4 Show all since last statement
- 5 View all



However, if changing the settings by selecting another of these menu items then the new setting will be remembered. These settings are 'user specific' which means each user's personal setting(s) will be remembered each time they enter the transactions screen.

The current selection, if other than view all, will be displayed in an orange box at the bottom of the transaction screen. The orange background is a warning to you that not all transactions may be showing.

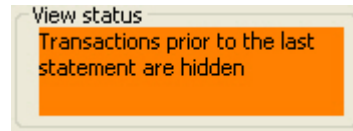


Figure58: View status

6 Show all family members

This is a special feature of student accounts. If a particular student has one or more siblings (in the same family), by clicking this menu item you can have all transactions relating to the various members of the family displayed (Figure 59). A new column displaying the name of the student to whom each of the transactions belongs is displayed at the left hand side of the screen.

Student	Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount
ANDERSON, RYAN	22-Feb-2008	Counter	School JH	200.00	
ANDERSON, RYAN	22-Feb-2008	Counter	9ART - Term 1	5.00	
ANDERSON, RYAN	22-Feb-2008	6668	Payment received		
ANDERSON, RYAN	25-Feb-2008	CN4	Refund		105.00
ANDERSON, RYAN	25-Feb-2008	Refund	Refund	105.00	
ANDERSON, RYAN	05-Mar-2008	6683	Payment received		236.00
ANDERSON, RYAN	31-Mar-2008	6684	Payment received		1000.00
ANDERSON, RYAN	08-Apr-2008	12421	Uniform skirt	80.00	
ANDERSON, RYAN	08-Apr-2008	12422	Uniform skirt	80.00	
ANDERSON, CATHERINE	14-Oct-2008	Counter	Testing	33.00	
ANDERSON, CATHERINE	14-Oct-2008	6908	Payment received		50.00

Figure 59: Displaying all family members

While all family members are displayed the usual transactions cannot be performed, however transferring a debit or credit balance from one family member to another can. To do this, identify the transaction to be transferred, click the student's name. A drop down list of all family members will appear (Figure 60), select the student to whom you wish to transfer the balance.

ANDERSON, RYAN	05-Mar-2008	6683	Payment received		236.00	31.00 Cr
ANDERSON, RYAN	1-Mar-2008	6684	Payment received		1000.00	1000.00 Cr
ANDERSON, CATHERINE	8-Apr-2008	12421	Uniform skirt	80.00		80.00 Dr

Figure 60: Transferring a transaction between siblings

The following message will appear for confirmation of the transaction (Figure 61).

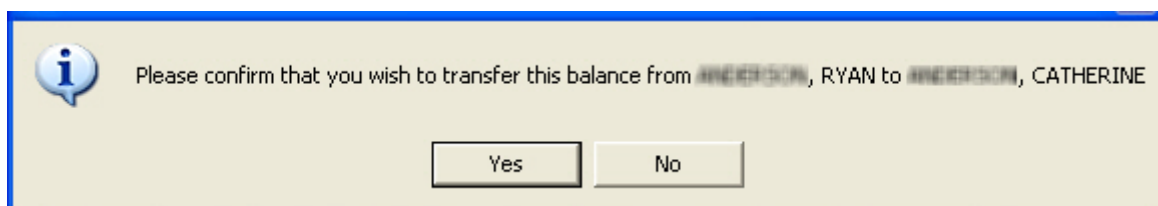


Figure 61: Confirming the transfer

Clicking yes will create a credit/debit leg on the student from whom you are transferring, and a corresponding debit/credit leg will appear on the other.

Remember to switch family view OFF before attempting to proceed with normal transactions.

7 Remember current column sorting

By clicking the heading of a transaction column it can be sorted either Ascending or Descending. The default setting is ascending date order. Once changes have been made to the order. Click View/Remember current column sorting to memorize. This is a personal default setting and will not apply to others who sign on under different entry codes / passwords.

8 View your current batch file

A print preview will show of the current batch file, which shows the transactions contains within it. This can then be printed if required.

9 Close the current batch file

This will close the batch file that is open by the user. This will also give the option to print the file.

## OPTIONS

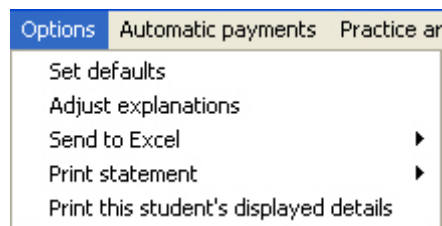


Figure 62: The Options menu

1 Set defaults

This links straight through to the Financial defaults area. More information on this is in Chapter ?? The main screen for the process is shown below (Figure 63).

**Set Financial Defaults** N.B. \* These default settings are user-specific. Each user has his or her own default settings.

**Receipting defaults**

Next receipt no.  No. of copies

Default Receipt

**Banking list**

You may elect to have details of cheques recorded against such payments and the results of such payments listed either at the end of each session or on request.

Record details of each cheque as received

Generate a banking list :  at the end of the batch  on request \*

\* An existing banking list may be printed via 'Print any temporary lists'

**Default Statement \***

This is the statement which will be printed should you print a student's statement via the 'Options' menu.

**Credit Note defaults \***

Next credit note no. CN  No. of copies

Default Credit note

**Batch Report defaults \***

Batch Item Analysis - Show amounts EXCLUSIVE of GST

**Reduced format receipt printing \***

If you are wishing to use the 40-character receipt printing option (via LPT1 or LPT2) then select the printer type .

Printer type

Activate the autocut feature after each receipt is printed

**GST number**

School's G.S.T. Number N.B. This detail is NOT user-specific, but is common to all

**Opening the cash drawer \***

You may have the cash drawer of your register automatically opened whenever you process a payment

**Link to MUSAC Accounts**

Generate a file of ledger totals to transfer to MUSAC Accounts

MUSAC Accounts application code (A - Z)

Path to MUSAC Accounts package ( e.g. c:\MUSACACC\ )

Into which ledger in MUSAC Accounts do you wish to record 'Income in Advance' e.g. 89020.00?

Include a FULL listing of all transactions in the link report

Figure 63: The defaults screen

## 2 Adjust explanations

Explanation can be attached to particular transactions. In some cases, an explanation is compulsory e.g. discounts, journals etc. Several predefined explanations can be set up here (Figure 64). These will show in the drop down menu at the bottom of the transaction screen (Figure 65). The Adjust explanations, is also available by clicking the browse button next to the Default explanation (Figure 65).

The following screen allows you to adjust your file of default explanations.

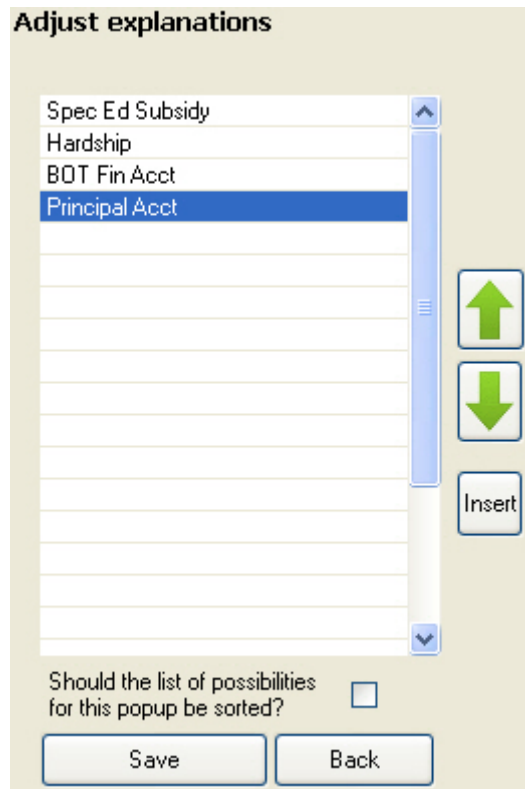


Figure 64: Adjusting the explanation popup entries

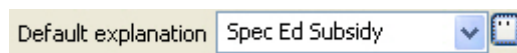


Figure 65: Pop up default explanation

3 Send to Excel

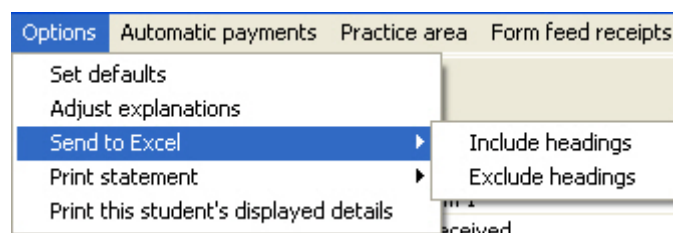


Figure 66: Sending a student's data to Excel

This enables users to export a student's transactions to Excel. Once clicked and Excel is installed on the computer it will automatically open Excel and display the contents of the file. This can be done with or without the column headings. (Figure 67)

	A	B	C	D	E	F	G	H	I	J	K
1	Date	Inv/Rcpt	Detail	Db amount	Cr amount	Item balance	GST	Status	Ledger	Method	
2	13-Oct-08	Counter	Testing	33			3.67	Y	27		
3	13-Oct-08	Counter	Testing	33		33.00 Dr	3.67	N	27		
4	13-Oct-08	Journal00	Payment received		33		3.67	J	1	Journal	
5											

Figure 67: The data in Excel

4 Print statement

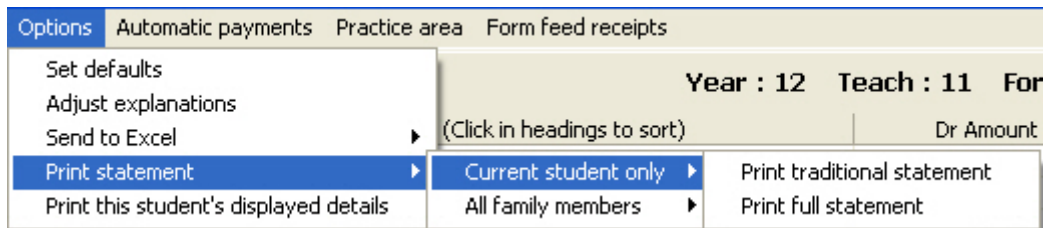


Figure 68: Print statement

By clicking this menu option a statement can be printed for either the current student or for all family members. The choice of a traditional statement (Opening balance, all transactions since last statement, closing balance) or a Full statement (No opening balance, user selected unpaid items, unallocated payments received (if selected)) is also available.

Prior to using this process a default statement design must have been selected via Financial defaults.

If a 'Traditional' statement has been chosen then the closing balance of this statement will be recorded on to the student's transaction screen and will later be identified and used as the 'Opening balance' for the next statement printed for this student.

Date	Invoice/Receipt	Detail	(Click in headings to sort)	Dr Amount	Cr Amount	Balance
14-Oct-2008	Counter	Testing		33.00		13.00 Dr
14-Oct-2008	Counter	Testing 2		50.00		50.00 Dr
23-Oct-2008	6919	Payment received			20.00	
23-Oct-2008	7129	Statement balance		63.00		

Figure 69: Statement balance

5 Print this student's displayed details

This option will send a table to the printer, reflecting those transactions currently available on the screen (reflecting the 'view' settings described earlier).

## Automatic payments

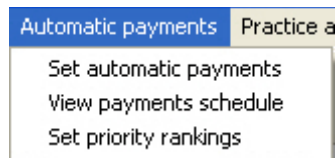


Figure 70: Automatic payments

### 1 Set automatic payments

Automatic Payments are set for individual students via this menu (Figure 70). Each student may have more than one payment scheduled, and each student's payment definitions are listed on the screen (Figure 71).

**Automatic payment details for** [REDACTED] **DANE DAN**

Amount	Frequency	From date	Last date	Last payment	Allocation	Comment
20.00	Fortnightly	01/01/2008	31/12/2008	20.00	Payment received	

**Add New**    Amount:

**Delete**    Frequency:  Or every  days

**Copy**    **Paste**    From date:

**Update Schedule**    Last date:

    Last payment:

    Allocate to:

    Comment:

    Receipt detail:     **Save**

Figure 71: Setting up an automatic payment

Click 'Add new' to add payment definitions and complete the various features which define the payment. These are:

- Amount: Dollar amount of payment
- Frequency: How often will the payment be received
- From date: When payments start
- Last date: When payments finish

- Last payment: If the final payment differs from the amount coming in
- Allocate to: Click this area and the list of billable items will display. Choose from the options available in (Figure 72).
- Comment: This will appear on the transaction page
- Receipt detail: Could be a number or just the letter AP

**Select the item to which the auto-payment is to be applied**

No specified item - just a payment in advance - record against 'Payment'

Allocate according to the specified priority ranking (see 'Automatic payments - Set priority rankings')

Allocate to all outstanding debts in date order

Selected item

Testing

9ART - Term 1

9ART - Term 2

9ART - Term 3

9ART - Term 4

School (2+)JH

School fees for 3 terms

School fees for 2 terms

School fees - 3 terms 2+

School JH

10ART - Terms 1-2

10ART - Term 3-4

Art Yr 11

Art Yr 11 - 3 Terms

Art Yr 12

Art Yr 13

Art for 3 terms

Art for 2 Terms

Photography Yr 12

Photography Materials

9Performing Arts

9Performing Arts - Term 2

9Performing Arts - Term 3

9Performing Arts - Term 4

10Performing Arts

School fees (1)JH

11Performing Arts

12Performing Arts

13Performing Arts

OK Cancel

Figure 72: The payment alternatives

The above options can be used for pre-allocating payments.

- 1 No specified item – simply receive each payment as an advance payment.
- 2 Allocate according to the specified priority ranking - eg. a student may have several outstanding debts and the payments, as they are received, will be allocated to these according to the priority ranking which you establish via the third menu item (Set priority ranking) (Figure 72) under 'Automatic payments'.
- 3 Allocate to all outstanding debts in date order.
- 4 Selected item – select the item to which this payment is to be allocated. When the payment(s) are received and the student still has an outstanding debt under the nominated item then the balance due will be reduced by the amount of the payment. If a payment is received surplus to the outstanding debt then it will be recognized as an advance payment.

Click 'Save' and the payment details will appear on the screen (Figure 71).

Click 'Update schedule' button (Figure 71) and the payments will be added to the database of expected payments. If the payments start before the current date then a conformation message will appear (Figure 72).

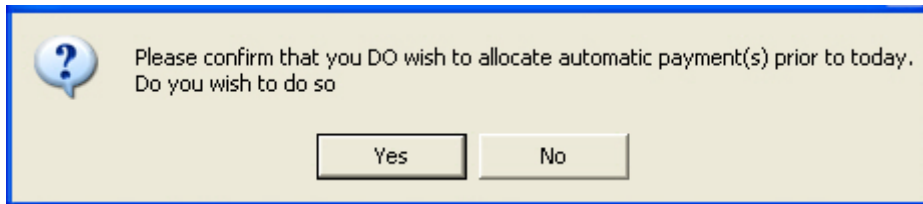


Figure72: Confirmation of prior date

The next screen will indicate the number of payments added to the schedule (Figure 73).

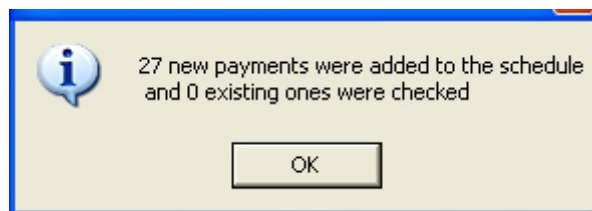


Figure 73: Number of payments

To view this list directly (Figure 75), click 'View schedule' (Figure 74) at the bottom of the screen. To return to the details click 'View details' (Figure 76).



Figure 74: Details buttons



**Automatic payment schedule for ONE DAN**

Date	Amount	Allocation	Status	Comment
01/01/2008	20.00	Payment received	Not processed	
15/01/2008	20.00	Payment received	Not processed	
29/01/2008	20.00	Payment received	Not processed	
12/02/2008	20.00	Payment received	Not processed	
26/02/2008	20.00	Payment received	Not processed	
11/03/2008	20.00	Payment received	Not processed	
25/03/2008	20.00	Payment received	Not processed	
08/04/2008	20.00	Payment received	Not processed	
22/04/2008	20.00	Payment received	Not processed	
06/05/2008	20.00	Payment received	Not processed	
20/05/2008	20.00	Payment received	Not processed	
03/06/2008	20.00	Payment received	Not processed	
17/06/2008	20.00	Payment received	Not processed	
01/07/2008	20.00	Payment received	Not processed	
15/07/2008	20.00	Payment received	Not processed	
29/07/2008	20.00	Payment received	Not processed	
12/08/2008	20.00	Payment received	Not processed	
26/08/2008	20.00	Payment received	Not processed	
09/09/2008	20.00	Payment received	Not processed	
23/09/2008	20.00	Payment received	Not processed	
07/10/2008	20.00	Payment received	Not processed	
21/10/2008	20.00	Payment received	Not processed	
04/11/2008	20.00	Payment received	Not processed	
18/11/2008	20.00	Payment received	Not processed	
02/12/2008	20.00	Payment received	Not processed	
16/12/2008	20.00	Payment received	Not processed	
30/12/2008	20.00	Payment received	Not processed	

Figure 75: Auto payments



Figure 76: View buttons

At the time of processing payments (this is done via Process Autopayments from the Student Finances menu) the option to postpone one or more payments will be available. However, to cancel payments via this screen, select the payment(s) to be cancelled and click 'Cancel Payment' (Figure77).

**Automatic payment schedule for ABRAHAM, Stephen**

Date	Amount	Allocation	Status	Comment
01/01/2008	10.00	Payment received	Not processed	
15/01/2008	10.00	Payment received	Not processed	
29/01/2008	10.00	Payment received	Not processed	
12/02/2008	10.00	Payment received	Not processed	
26/02/2008	10.00	Payment received	Not processed	
11/03/2008	10.00	Payment received	Not processed	
25/03/2008	10.00	Payment received	Not processed	

Figure 77: Cancelling an Auto Payment

During the processing of automatic payments the opportunity to decide whether or not receipts are to be printed is available. If so, then the details specified will appear on the receipt.

After defining a particular payment it can be copied to other students by using the 'Copy' and 'Paste' buttons. Select the payment, click 'Copy', using Alt-S, jump to the required student, click 'Paste'. The payment will show on the new student's list. With the payment definition in the 'copy' buffer, it can be added to other students by clicking 'Paste'.

Once the copy is completed, click 'Update schedule' to have the relevant payments added to the student's list of future payments.

## 2 View payments schedule

Clicking this menu item will show you the payment schedule as in (Figure 75).

### 3 Set priority rankings

This is where the billable items to be paid are ranked as discussed above. Below is a screen view of the area (Figure 78).

Select those billables items which are to be paid by autopayment. The items should be selected in priority order.

Select items from :

- Testing
- Testing 2
- 9ART - Term 1
- 9ART - Term 2
- 9ART - Term 3
- 9ART - Term 4
- School (2+)JH
- School fees for 3 terms
- School fees for 2 terms
- School fees - 3 terms 2+
- School JH
- 10ART - Terms 1-2
- 10ART - Term 3-4
- Art Yr 11
- Art Yr 11 - 3 Terms
- Art Yr 12
- Art Yr 13
- Art for 3 terms
- Art for 2 Terms
- Photography Yr 12
- Photography Materials**
- 9Performing Arts
- 9Performing Arts - Term 2
- 9Performing Arts - Term 3
- 9Performing Arts - Term 4
- 10Performing Arts
- School fees (1)JH

Selected items in order of priority

- Testing 2**
- Testing
- Photography Materials

Move selected item up

Move selected item down

Delete selected item

Save

Figure 78: Setting priority rankings

### *Practice Area*

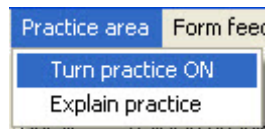


Figure 79: Turning Practice on

This has already been described Page ???. If the 'Practice area' (Figure 79) is turned on then any transactions generated cannot be saved to the database.

### **Form Feed Receipts**

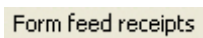


Figure 80: Form feed receipts

By choosing this menu item (Figure 80), the option to print those receipts that haven't already been printed is available.

## Reprinting

By clicking on a receipt, invoice, or statement number the details of that transaction will be displayed. This will allow a user to reprint the details of an earlier transaction or receipt.

Eg: Invoice details (Figure 81).

**Details of Invoice number 12450**

Date	Student	Detail	Amount	GST
24/10/2008	ABRAHAM, ASHLEY	Testing	33.00	3.67

**Unallocated balance : 33.00**

Print Details

Close

Figure 81: Reprinting invoice details

Eg: Receipt details (Figure 82)

**Details of Receipt number 6674**

Date	Student	Detail	Amount	GST
25-Feb-2008	ABRAHAM, ASHLEY	Payment received	200.00	0.00
	Total payment received		200.00	0.00

**In payment of :**

Date	Invoice	Student	Detail	Amount	GST
22/02/2008	Counter	ABRAHAM, ASHLEY	School JH	200.00	
		Total payment allocated		200.00	0.00

Figure 82: Receipt details

## Other options

If a previously defined explanation needs to be altered, click it, and an editing window will appear (Figure 83).

**Transaction explanation**

Either select

Or enter detail

Paid out by Cash

Figure 83: Transaction explanation

At the bottom of the screen, three details are displayed (Figure 84):

<b>Total outstanding debt : \$42.30</b>	
Current payment	: \$0.00
Default date :	<input type="text" value="24/10/2008"/>

Figure 84: Current debt position

1. The student's current debt/credit.
2. The current payment being processed.
3. The default date

The 'Default date' of each new transaction is taken as the date entered here. By default it is the current date, but this can be edited.

## 16.4 Financial defaults

The default setting screen is shown below

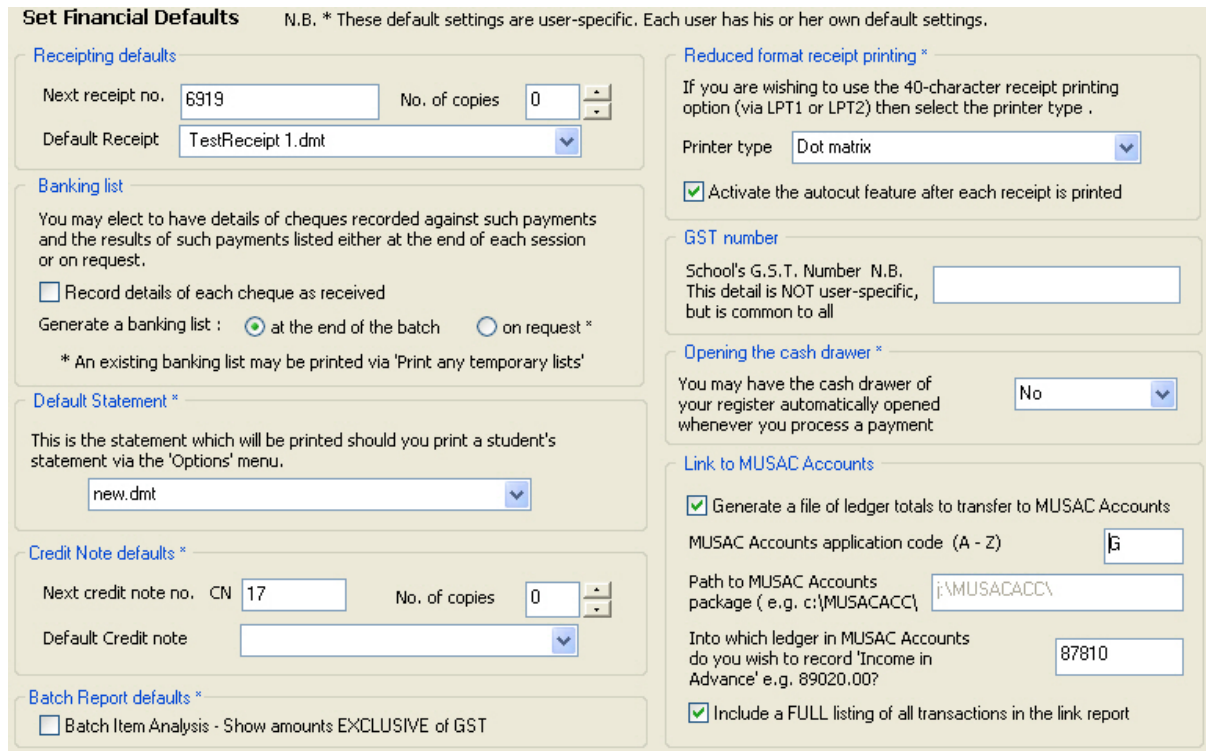


Figure 85: The defaults screen

**Note:** The default settings are user-specific. Each user has his or her, own default settings.

### Receipting defaults

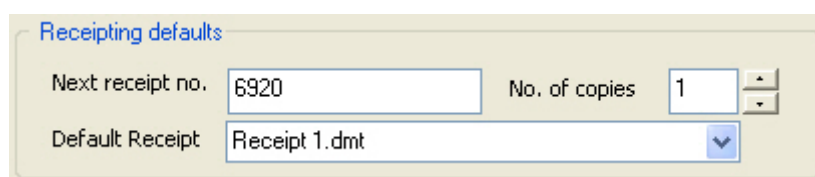


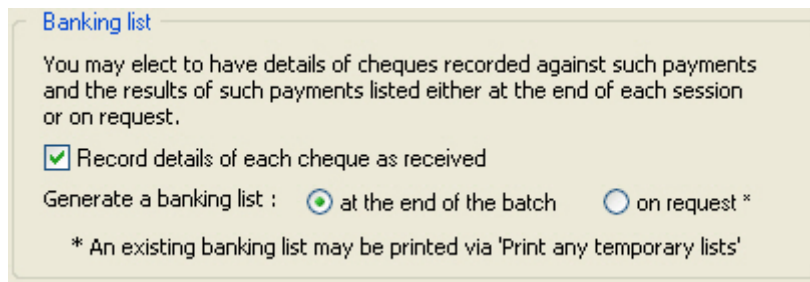
Figure 86: Receipting defaults

**Next receipt number:** This is the only setting that will apply to all users. Once this number is set it will apply to all users of the program regardless of whether a receipt is printed or not.

**Default Receipt:** There are a range of receipts that users can design and use. (Link : Design a financial document). The receipt that you select here will be the one that prints each time if another design is not chosen at the time of printing.

**Number of copies:** The number of receipts to be printed.

*Banking List (Figure 87).*



**Banking list**

You may elect to have details of cheques recorded against such payments and the results of such payments listed either at the end of each session or on request.

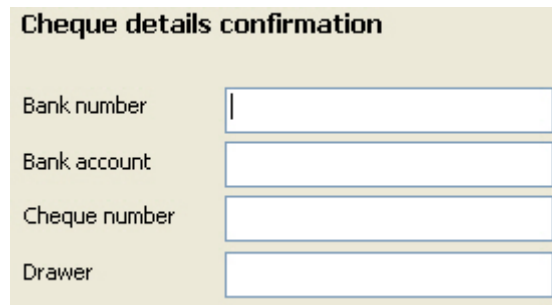
Record details of each cheque as received

Generate a banking list :  at the end of the batch  on request \*

\* An existing banking list may be printed via 'Print any temporary lists'

Figure 87: Banking list defaults

As a cheque payment is processed, its details are optionally recorded at the time or later to a banking list. Tick the appropriate box for this to occur. A window will appear when a payment is generated to record the cheque details (Figure 88).



**Cheque details confirmation**

Bank number

Bank account

Cheque number

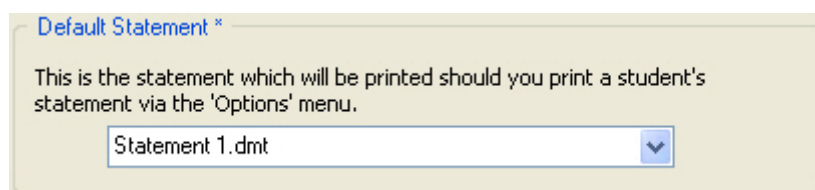
Drawer

Figure 88: Cheque details

The bank number/account and Drawer will be saved as the default setting against the student for any further payments via cheque. This means each time, all that needs to be altered is the cheque number.

The banking list can be printed each time you exit from the transaction screen, after closing a batch. The alternative is to not have the printing offered at this point but print it later from the 'Print any Temporary Lists' area. This area has a number of reports that can be printed also such as Invoice, Banking and Transactions lists.

*Default statement (Figure 89).*



**Default Statement \***

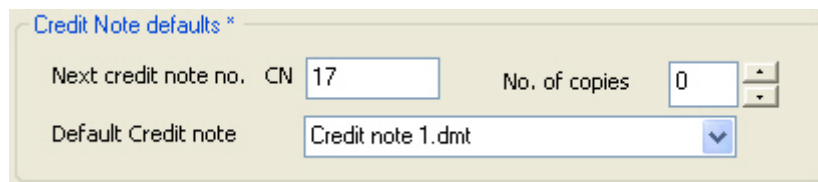
This is the statement which will be printed should you print a student's statement via the 'Options' menu.

Figure 89: The default statement design



As the receipt defaults the default statement is set in the same manner. (See designing statements).

#### *Credit note defaults*

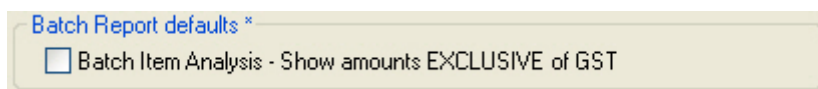


The screenshot shows a window titled "Credit Note defaults \*". It contains three fields: "Next credit note no. CN" with a text box containing "17", "No. of copies" with a spinner box containing "0", and "Default Credit note" with a dropdown menu showing "Credit note 1.dmt".

Figure 90: The credit note default settings

This area is the same as the receipt/statement default settings described above.

#### **Batch report defaults**

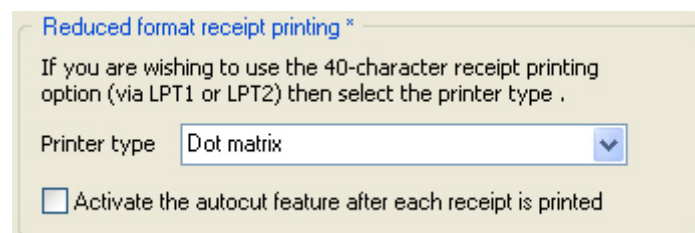


The screenshot shows a window titled "Batch Report defaults \*". It contains a single checkbox labeled "Batch Item Analysis - Show amounts EXCLUSIVE of GST", which is currently unchecked.

Figure 91: Batch report defaults

This option shows amounts exclusive of GST if ticked.

#### *Reduced format receipt printing*

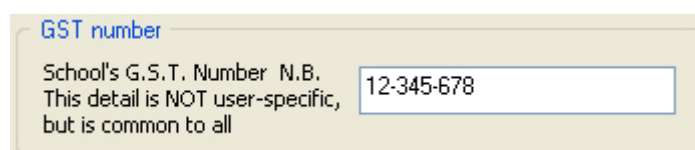


The screenshot shows a window titled "Reduced format receipt printing \*". It contains a text box with the instruction: "If you are wishing to use the 40-character receipt printing option (via LPT1 or LPT2) then select the printer type .". Below this is a "Printer type" dropdown menu set to "Dot matrix". At the bottom is an unchecked checkbox labeled "Activate the autocut feature after each receipt is printed".

Figure 92: Reduced format receipt printing

Some schools use small forty-character, dot matrix receipt printers, which are attach to the student finances computer. Two designs for such a receipt are offered in the choice of receipt designs. These are pre designed. Select the printer type via which you wish to print such receipts. The option to activate the automatic cutting mechanism, which some of these receipt printers have after printing is also available.

#### *GST number*

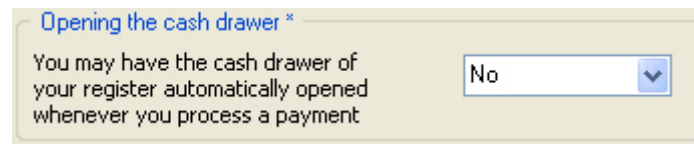


The screenshot shows a window titled "GST number". It contains a text box with the label "School's G.S.T. Number N.B. This detail is NOT user-specific, but is common to all" and a text input field containing the number "12-345-678".

Figure 93: The school's GST number

The school's GST number.

*Opening the cash drawer*



Opening the cash drawer \*

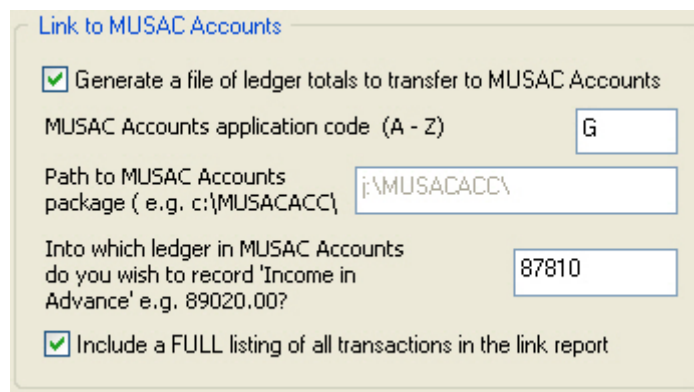
You may have the cash drawer of your register automatically opened whenever you process a payment

No

Figure 94: Cash drawer setting

Some schools have a cash drawer attached to the student finances computer, and on receipt of a payment, the suitable setting here will cause the cash drawer to be automatically opened.

**Link to MUSAC Accounts** (Figure 95).



Link to MUSAC Accounts

Generate a file of ledger totals to transfer to MUSAC Accounts

MUSAC Accounts application code (A - Z) G

Path to MUSAC Accounts package ( e.g. c:\MUSACACC\ ) j:\MUSACACC\'

Into which ledger in MUSAC Accounts do you wish to record 'Income in Advance' e.g. 89020.00? 87810

Include a FULL listing of all transactions in the link report

Figure 95: Linking to the MUSAC Accounts software

Schools using MUSAC Accounts can generate a ledger summary of payments received available for that package. To activate the link, specify the application code (a single character) which identifies the chart of accounts into which the file is to be passed, and the path via which the MUSAC Accounts package may be found.

## 17 Financial Transactions

### 17.1 An overview of student financial transaction types

There are many different ways of applying transactions to students. Each of these is saved into a batch, and eventually transferred to the audit trail as the batch is closed. On exiting a students' financial screen, the opportunity to close and/or view the current batch report is available. This can also be viewed via 'Student Finances/Reports/Transaction search'.

The batch report consists of three sections:

- 1 A list of all of the transactions contained in the batch.
- 2 'Banking' summary of the transactions in the batch.
- 3 'Batch item analysis' provides detailed information on the transactions.

Each transaction type has a different affect on the batch report. The following is a brief description of those differences.

### 17.2 Transaction types

#### *Counter item – unpaid*

A debt generated via 'Counter Transaction' with no payment received.

Counter transaction/Billable item/OK/Unpaid/Proceed/Save changes. The transaction is reflected as in (Figure 96).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T., St.
26-Oct-2008	Counter	Testing	33.00		33.00 Dr	3.67 N

Figure 96: Unpaid transaction

To view the 'Batch Report', Click 'Close' from the transaction page and the following screen will appear (Figure 97).

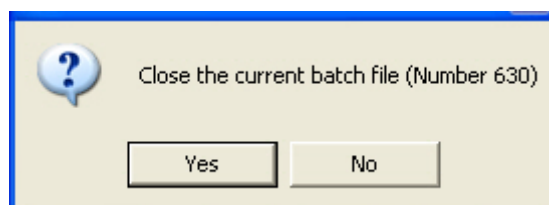


Figure 97: Closing the batch

Click 'Yes' for the following screen (Figure 98).

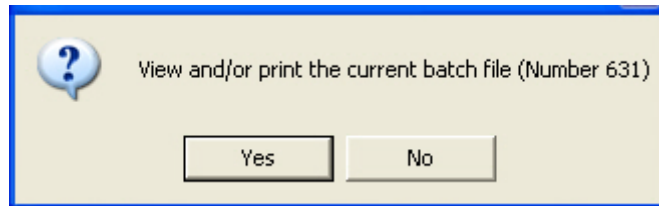


Figure 98: View the batch file

Click 'Yes'. The first page of the Batch report is the list of transactions (Figure 99).

Date	Time	User	Student	Teach	Form	Transaction
26/10/2008	15:31:29	MUSAC MUSAC	ANGKIRIWANG, ELBERT	10WS	10WS	Current Item Unpaid

Item	Amount	GST	Ledger	Method	Batch
Testing	33.00	3.67	27		631

Figure 99: Unpaid transaction

The second page of the report displays zero totals as there is no banking involved with the above transaction (Figure 100). Figures will only show if payments have been received.

**Transaction totals**

**Banking**

Cheque	0.00
Cash	0.00
Refunds paid in cash	(0.00)
<b>Banking Subtotal</b>	<b>0.00</b>

**Non-Banking**

Credit card	0.00
VISA	0.00
Mastercard	0.00
EFTPOS	0.00
Automatic payment	0.00
<b>Non-Banking subtotal</b>	<b>0.00</b>

<b>Income subtotal</b>	<b>0.00</b>
------------------------	-------------

**Other**

Journal	0.00
Exemption	0.00
Credit	0.00
Discount	0.00
Transfer	0.00
Refund paid out by cheque	0.00
Refund not paid out	0.00
Refund of credit balances by cheque	0.00
Allocation of credit balances to existing debts	0.00
<b>Other subtotal</b>	<b>0.00</b>

Figure 100: Transaction totals

The last page is the Item Analysis (Figure 101).



**Batch Item Analysis - GST Exclusive**

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1						

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing	27							29.33	3.67	29.33	3.67
<b>Ledger total</b>	<b>27</b>							<b>29.33</b>	<b>3.67</b>	<b>29.33</b>	<b>3.67</b>
<b>Grand totals</b>								<b>29.33</b>	<b>3.67</b>	<b>29.33</b>	<b>3.67</b>

Figure 101: The batch report item analysis

This report shows a summary of all the information from the previous pages. Whether the item was paid or not, if a credit was given and the type of credit. The G.S.T. content of those items, etc.

*A counter item - paid immediately*

A debt generated via 'Counter Transaction' with payment received at the same time.

Counter transaction/Billable item/OK/Paid/Proceed/Save changes. The transaction is shown as in (Figure 102).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
27-Oct-2008	Counter	Testing 2	50.00				Y
27-Oct-2008	6923	Payment received		50.00			A

Figure 102: The transaction paid

The first page of the batch report lists the transaction as a 'Counter item paid immediately' (Figure 103). The second page shows the payment and type of payment under 'Banking' (Figure 104), and page 3 shows:

- 1 A payment of \$50 was received
- 2 The Testing 2 item has a \$50 payment
- 3 The test item has had \$50 invoiced (Figure 105).

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	18:01:32	MUSAC MUSAC	ARAOVITIS, ALEXIA	12	12PE	Counter item paid immediately

Item	Amount	GST	Ledger	Method	Batch
Testing 2	50.00	0		Cash	632

Figure 103: The batch report transaction list

**Banking**

Cheque	0.00
Cash	50.00
Refunds paid in cash	(0.00)
<b>Banking Subtotal</b>	<b>50.00</b>

Figure 104: Transaction totals Paid

**Batch Item Analysis - GST Exclusive**

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	50.00				50.00	

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing 2		50.00								50.00	
<b>Ledger total</b>		<b>50.00</b>								<b>50.00</b>	
<b>Grand totals</b>		<b>50.00</b>								<b>50.00</b>	

Figure 105: The batch report item analysis

*A counter debt - paid via double-click*

A debt which was generated earlier and is now being paid in full.

Double click the item with the outstanding debt. It will be paid immediately without having to use the confirm transaction screen, as in the two previous options above.

The payment will be reflected just as the Counter item-paid immediately (Figure 102). The Batch report will also be reflected in a similar manner (Figures 103 – 105), however the Transaction column on the first page will list the payment as 'Payment via double click' (Figure 106).

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	18:56:16	MUSAC MUSAC	ANGKIRIWANG, ELBERT	10WS	10WS	Payment via double click

Item	Amount	GST	Ledger	Method	Batch
Testing	33.00	3.67	27	Cash	633

Figure 106: The batch report transaction list

*Payment via the counter - in full*

When a debt has been generated earlier and full payment has now been received. Rather than double clicking, the debt is highlighted and the 'P' kiwi button is clicked.

The confirmation screen appears, with the full amount as the default payment (Figure 107).

**Confirmation of Payment or Part-payment**

**Items paid**

Item	Cost	GST	Ledger
Testing 2	50.00		

Transaction total: 50.00

Payment received: 50.00

Payment balance:

If the payment made covers more than the amount due then the surplus will be retained as an unallocated balance against item :

Payment received

Either  Print receipt or  don't print

Receipt: Receipt 1.dmt

Method: Cash

Figure 107: The confirmation settings

Click 'Proceed' to return to the transaction screen, and the payment leg has now been added (Figure 108).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
27-Oct-2008	Counter	Testing 2	50.00				Y
27-Oct-2008	6923	Payment received		50.00			A

Figure 108: The transaction displayed

The batch report will show the transaction as in previous transactions above but the Transaction column will show 'Full payment via counter' (Figure 109). The rest of the batch report will be as above also.

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	19:37:19	MUSAC MUSAC	ANDREWS, TYRONE	10JH	10JH	Full payment via counter

Item	Amount	GST	Ledger	Method	Batch
Testing 2	50.00	0.00		Cash	635

Figure 109: The batch report transaction list

**A part-payment via the counter** = this is similar to above but only part of the full amount owing is paid.

Highlight the debt/Click 'P'/Change the default payment to that received/click Proceed (Figure 110).



**Confirmation of Payment or Part-payment**

**Items paid**

Item	Cost	GST	Ledger
Testing	33.00	3.67	27

Transaction total: 33.00

Payment received: 10.00

Payment balance: 23.00 Dr

If the payment made covers more than the amount due then the surplus will be retained as an unallocated balance against item :

Payment received

Either  Print receipt or  don't print

Receipt: Receipt 1.dmt

Method: Cash

Figure 110: Part payment confirmation

The part payment is then shown on the transaction screen (Figure 111).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance
27-Oct-2008	Counter	Testing	33.00		23.00 Dr
27-Oct-2008	6927	Payment received		10.00	

Figure 111: Part payment displayed

The Transaction column will show 'Part payment via counter' on the first page of the batch report (Figure 112). The second page will show as in previous transaction. Page 3 will show the payment and how much is left unpaid (Figure 113).

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	19:59:38	MUSAC MUSAC	ARMSTRONG, GILLIAN	13	13SM	Partpayment via counter

Item	Amount	GST	Ledger	Method	Batch
Testing	10.00	1.11	27	Cash	638

Figure 112: The batch report transaction list

Batch Item Analysis - GST Inclusive

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	10.00	1.11			10.00	1.11

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing	27	10.00	1.11					(10.00)	(1.11)		
<b>Ledger total</b>	<b>27</b>	<b>10.00</b>	<b>1.11</b>					<b>(10.00)</b>	<b>(1.11)</b>		
<b>Grand totals</b>		<b>10.00</b>	<b>1.11</b>					<b>(10.00)</b>	<b>(1.11)</b>		

Figure 113: The batch report item analysis

*An advance payment*

*Payment has been received but the student has no debt, so the payment will be held as a credit for future debts.*

Click 'P'. The confirmation screen will appear so the amount of the payment can be entered (Figure 113).

**Confirmation of Payment or Part-payment**

**Items paid**

Item	Cost	GST	Ledger

Transaction total

Payment received

Payment balance

If the payment made covers more than the amount due then the surplus will be retained as an unallocated balance against item :

Either  Print receipt or  don't print

Receipt:

Method:

Figure 113: The confirmation settings

Click Proceed and the payment will show as an unallocated credit on the transaction page (Figure 114).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
27-Oct-2008	6929	Payment received		20.00	20.00 Cr		U

Figure 114: The transaction displayed

The Transaction column will show 'Advanced payment' on the first page of the batch report (Figure 115). The second page will show as in the previous transactions. Page 3 will show the payment and record it as 'Unallocated' (Figure 116).

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	20:13:58	MUSAC MUSAC	ARROW, DAVID	10JH	10JH	Advance payment

Item	Amount	GST	Ledger	Method	Batch
Payment received	20.00		1	Cash	639

Figure 115: The batch report transaction list

Batch Item Analysis - GST Inclusive

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1			20.00		20.00	

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
<b>Ledger total</b>								20.00			
<b>Grand totals</b>											

Figure 116: The item analysis

*An over-payment*

Payment is received for more than the original debt. The over payment will be held as an advance payment (Figure 117).

**Confirmation of Payment or Part-payment**

**Items paid**

Item	Cost	GST	Ledger
Testing	33.00	3.67	27

Transaction total:

Payment received:

Payment balance:

If the payment made covers more than the amount due then the surplus will be retained as an unallocated balance against item :

Either  Print receipt or  don't print

Receipt:

Method:

Figure 117: The confirmation settings



The \$50 payment has been used to pay for the \$33 debt, and the balance of \$17 is now an advance payment, as shown on the student's screen with the 'U' status (Figure 118).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T.	St.
27-Oct-2008	Counter	Testing	33.00			3.67	Y
27-Oct-2008	6930	Payment received		50.00	17.00 Cr		U

Figure 118: The transaction displayed

The first page of the batch report shows the two parts of the transaction. A 'Full payment via counter' and 'Advance payment via counter' (Figure 119). Page 2 will show the payments as in the previous transactions. Page 3 will show the payment with \$33 Allocated and \$17 unallocated (Figure 120).

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	20:44:55	MUSAC MUSAC	ARTHUR, STORME	10JH	10JH	Full payment via counter
27/10/2008	20:44:55	MUSAC MUSAC	ARTHUR, STORME	10JH	10JH	Advance payment via counter

Item	Amount	GST	Ledger	Method	Batch
Testing	33.00	3.67	27	Cash	642
Payment received	17.00		1	Cash	642

Figure 119: The batch report transaction list

**Batch Item Analysis - GST Inclusive**

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	33.00	3.67	17.00		50.00	3.67

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing	27	33.00	3.67					(33.00)	(3.67)		
<b>Ledger total</b>	<b>27</b>	<b>33.00</b>	<b>3.67</b>					<b>(33.00)</b>	<b>(3.67)</b>		
<b>Grand totals</b>		<b>33.00</b>	<b>3.67</b>					<b>(33.00)</b>	<b>(3.67)</b>		

Figure 120: The batch report item analysis

*Refunds*

A refund can be done for either the full or part payment of a debt. The payment can also be either paid out or not paid out. If not paid out the payment will be held as an advanced payment for future debts.

**Refund** = Not paid out.

To make the refund, select the debit leg - i.e. the item itself, not its payment, click 'R' and the confirmation screen will appear (Figure 121).

**Refund of payments**

You have selected the following paid items to be refunded (either in full or in part)

Date	Item	Amount Paid	Refund
27-Oct-2008	Testing 2	50.00	50.00

The refund(s) listed have been :

Not paid out  
 Paid out

Either Print credit  Or don't print  Credit note

Figure 121: The confirmation settings

Choose 'Not Paid Out' and if a credit note is to be printed or not. Click Proceed. The transaction screen will show the refund (Figure 122). Details of the refund will be recorded in the 'Exp' (Explanation) column, and the refund amount will show in the credit column.

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance
27-Oct-2008	Counter	Testing 2	50.00		
27-Oct-2008	6923	Payment received		50.00	
27-Oct-2008	CN17	Refund		50.00	50.00 Cr

G.S.T.	St.	Ledger	Method	Exp
	Y			
	A		1 Cash	
	U		1 Refund	Not paid out and is held in credit.

Figure 122: The items used in this section

The batch report Transaction column will show 'Refund not paid out' on page one (Figure 123). Page 2 will show the refund under 'Other' (Figure 124). Page 3 shows the amounts in both the allocated and unallocated columns. The credit amount will show with brackets around it to indicate it as a credit (Figure 125).

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	21:25:35	MUSAC MUSAC	ARAHOVITIS, ALEXIA	12	12PE	Refund not paid out

Item	Amount	GST	Ledger	Method	Batch
Testing 2	50.00	0.00			643

Figure 123: The batch report transaction list

**Other**

Journal	0.00
Exemption	0.00
Credit	0.00
Discount	0.00
Transfer	0.00
Refund paid out by cheque	0.00
Refund not paid out	50.00
Refund of credit balances by cheque	0.00
Allocation of credit balances to existing debts	0.00
<b>Other subtotal</b>	<b>50.00</b>

Figure 124: The transaction totals

**Batch Item Analysis - GST Inclusive**

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	(50.00)		50.00			

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing 2		(50.00)				50.00					
<b>Ledger total</b>		<b>(50.00)</b>				<b>50.00</b>					
<b>Grand totals</b>		<b>(50.00)</b>				<b>50.00</b>					

Figure 125: The batch report item analysis

*Refunds = paid out*

Select the debit leg/Click 'R'/Select 'Paid Out'/the method of payment(if by cheque the cheque number needs to be recorded)/whether a credit note is to be printed or not/Click Proceed (Figure 126).

**Refund of payments**

You have selected the following paid items to be refunded (either in full or in part)

Date	Item	Amount Paid	Refund
27-Oct-2008	Testing	33.00	33.00

The refund(s) listed have been :

Not paid out  
 Paid out

Method  Paid by cheque number :

Either  Print credit  
 Or  don't print

Figure 126: The confirmation settings

The refund will show as two transactions. One is the Credit leg, and the other is the debit leg (Figure 127).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance
27-Oct-2008	Counter	Testing	33.00		
27-Oct-2008	6932	Payment received		33.00	
27-Oct-2008	CN18	Refund		33.00	
27-Oct-2008	Refund	Refund	33.00		

G.S.T.	St.	Ledger	Method	Exp
3.67	Y		27	
3.67	A		1 Cash	
	A		1 Refund	Paid out by cheque number : 123456
3.67	Y		1 Cheque	Paid out by cheque number : 123456

Figure 127: The transaction displayed

The batch report shows a 'Refund paid out' in the transaction column on page 1 (Figure 128). Page 2 shows the amount paid out under 'Banking' with brackets to show it as a credit (Figure 129). An 'Allocated' credit will show in the 'Batch item analysis' on page 3 (Figure 130).

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	22:38:58	MUSAC MUSAC	ATKINS-DICKSON, DOMINIC	12	12MK	Refund paid out

Item	Amount	GST	Ledger	Method	Batch
Testing	33.00	3.67	27	Cash	646

Figure 128: The batch report transaction list

**Banking**

Cheque	0.00
Cash	0.00
Refunds paid in cash	(33.00)
<b>Banking Subtotal</b>	<b>(33.00)</b>

Figure 129: Batch report banking

**Batch item analysis**

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	(100.00)	(11.11)			(100.00)	(11.11)

Item	Ledger	Paid	G.S.T.	Disc/Exmt/Cred	G.S.T.	Refunded	G.S.T.
Test item	0275	(100.00)	(11.11)			100.00	11.11
Item 2	0275						
Item 3	0276						
Grand totals		(100.00)	(11.11)			100.00	11.11

Item	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Test item				
Item 2				
Item 3				
Grand totals				

Figure 130: The batch report item analysis



*The refund of a credit balance*

This is an advance payment which can now be returned.

Highlight the payment line containing the credit balance and click 'R', the 'Not paid out' option will be greyed out and will default to 'Paid out'/choose the method of payment and enter the cheque number if this is relevant/choose to print a credit note or not/click Proceed (Figure 131).

**Refund of payments**

You have selected the following paid items to be refunded (either in full or in part)

Date	Item	Amount Paid	Refund
27-Oct-2008	Payment received	20.00	20.00

The refund(s) listed have been :

Not paid out  
 Paid out

Method  Paid by cheque number :

Either Print credit  Or don't print  Credit note

Figure 131: The confirmation settings

The student's screen appears as shown (Figure 132).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount
10-Oct-2008	6902	Payment received		100.00
10-Oct-2008	Refund	Refund	100.00	

	Balance	G.S.T.	St.	Ledger	Method	Exp
I			A		1 Cash	
			Y		1 Cash	Paid out by Cash

Figure 132: The transaction displayed

The batch report contains a single transaction 'Refund paid out' (Figure 133). On page 2 it appears as a refund under 'Banking' (Figure 134). Under 'Allocated Payments' on page 3 the payment will be reflected as a credit (Figure 135).

Date	Time	User	Student	Teach	Form	Transaction
27/10/2008	22:38:58	MUSAC MUSAC	ATKINS-DICKSON, DOMINIC	12	12MK	Refund paid out

Item	Amount	GST	Ledger	Method	Batch
Testing	33.00	3.67	27	Cash	646

Figure 133: The batch report transaction list

### Banking

Cheque	0.00
Cash	0.00
Refunds paid in cash	(33.00)
<b>Banking Subtotal</b>	<b>(33.00)</b>

Figure 134: The transaction totals

### Batch Item Analysis - GST Inclusive

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	(33.00)	(3.67)			(33.00)	(3.67)

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing	27	(33.00)	(3.67)			33.00	3.67				
<b>Ledger total</b>	<b>27</b>	<b>(33.00)</b>	<b>(3.67)</b>			<b>33.00</b>	<b>3.67</b>				
<b>Grand totals</b>		<b>(33.00)</b>	<b>(3.67)</b>			<b>33.00</b>	<b>3.67</b>				

Figure 135: The batch report item analysis

### Discounts and exemptions

These are identical to each other in effect. The only difference is the description applied to the transaction.

Select the debit item and click the 'D' icon. The screen that comes up (Figure 136) will require some user decisions. How much is the Discount/Exemption? What is the explanation for the reduction? The explanation needs to be recorded before continuing with the transaction. Once the decisions have been made click the button that best describes the reduction reason.

**Confirmation of debt reduction details**

**Step 1** If necessary, change the amounts in the right hand column below

Date	Item	Balance due	Reduction	Percent
02-Nov-2008	Testing 2	50.00	25.00	50

**Step 2** Enter your explanation for the reduction(s)

Paid on time.

**Step 3** Select the process for the reduction

Discount(s) Exemption(s)

Figure 136: The confirmation settings

The student's screen appears as shown. A credit has been issued against the test item, and its amount due has been reduced by the corresponding amount (Figure 134).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount
02-Nov-2008	Counter	Testing 2	50.00	
02-Nov-2008	Note	Testing 2		25.00

	Balance	G.S.T.	St.	Ledger	Method	Exp
	25.00 Dr		N			
			A		Discount	Paid on time.

Figure 134: The transaction displayed

Page 1 of the batch report shows 'Discount' as the 'Transaction' (figure 135). Page 2 shows under 'Other' the amount of the discount (Figure 136). Page 3 shows the amount discounted in the 'Disc/Exmt/Cred' column and the balance left to pay in the 'Unpaid' column.

Date	Time	User	Student	Teach	Form	Transaction
02/11/2008	21:13:49	MUSAC MUSAC	AUGUSTO , RAFAEL	12	120K	Discount

Item	Amount	GST	Ledger	Method	Batch
Testing 2	25.00	0.00		Discount	649

Figure 135: The batch report transaction list

**Other**

Journal	0.00
Exemption	0.00
Credit	0.00
Discount	25.00
Transfer	0.00
Refund paid out by cheque	0.00
Refund not paid out	0.00
Refund of credit balances by cheque	0.00
Allocation of credit balances to existing debts	0.00
<b>Other subtotal</b>	<b>25.00</b>

Figure 136: The transaction totals

**Batch Item Analysis - GST Inclusive**

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1						

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing 2				25.00				(25.00)			
<b>Ledger total</b>				<b>25.00</b>				<b>(25.00)</b>			
<b>Grand totals</b>				<b>25.00</b>				<b>(25.00)</b>			

Figure 137: The batch report item analysis

*Payment of an item via a Journal*

Schools use this process to indicate that all or part of an item has been paid for by an external source other than the parents eg. the Principal's 'Slush fund'.

Select the debt and click the 'J' icon. Fill in the amount of the payment (Figure 138). Click Proceed and an 'Explanation' box will appear that will need to be filled in to explain the Journal payment. Either choose from the pre set explanations in the drop down menu or type in the box provided (Figure 139).

**Confirmation of payment by journal**

**Items paid**

Item	Cost	GST	Ledger
Testing	33.00	3.67	27

Transaction total

Payment received

Payment balance

Figure 138: The confirmation settings

**Explanation**

Transaction explanation

Select ?

Figure 139: Journal Explanation

The student's transaction page is reflected as shown below (Figure 140).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount
02-Nov-2008	Counter	Testing	33.00	
02-Nov-2008	Journal001	Payment received		33.00

Balance	G.S.T.	St.	Ledger	Method	Exp
	3.67	Y		27	
	3.67	J		1 Journal	Slush Fund

Figure 140: The transaction displayed

The batch report has a 'Part payment via counter' on page 1 (Figure 141). Page 2 shows the payment under 'Other' (Figure 142). Page 3 will show the payment and credit amounts of the transaction as no money actually changed hands (Figure 143).

Date	Time	User	Student	Teach	Form	Transaction
02/11/2008	21:36:12	MUSAC MUSAC	BACH, DAVID	11	119C	Full payment via counter

Item	Amount	GST	Ledger	Method	Batch
Testing	33.00	3.67	27	Journal	652

Figure 141: The batch report transaction list

**Other**

Journal	33.00
Exemption	0.00
Credit	0.00
Discount	0.00
Transfer	0.00
Refund paid out by cheque	0.00
Refund not paid out	0.00
Refund of credit balances by cheque	0.00
Allocation of credit balances to existing debts	0.00
<b>Other subtotal</b>	<b>33.00</b>

Figure 142: The transaction totals

**Batch Item Analysis - GST Inclusive**

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	33.00	3.67			33.00	3.67

Item	Ledger	Paid	G.S.T.	Disc/Exmt/Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing	27	33.00	3.67					(33.00)	(3.67)		
<b>Ledger total</b>	<b>27</b>	<b>33.00</b>	<b>3.67</b>					<b>(33.00)</b>	<b>(3.67)</b>		
<b>Grand totals</b>		<b>33.00</b>	<b>3.67</b>					<b>(33.00)</b>	<b>(3.67)</b>		

Figure 143: The batch report item analysis

*Payment via allocation = a student's unallocated payment can be applied to a new debt via 'allocation'.*

Prior to the process the student's screen will show the credit with a 'U' status and the debt as a 'N' (Figure 144).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount
05-Nov-2008	6934	Payment received		50.00
05-Nov-2008	Counter	Testing 2	50.00	

Balance	G.S.T.	St.	Ledger	Method
50.00 Cr		U		1 Cash
50.00 Dr		N		

Figure 144: The transaction displayed

Select both transactions/Click 'A' kiwi. (users may select more than one debt but only one credit at a time) The following screen will appear (Figure 145).

**Allocation of payments to unpaid debts**

The following available balances ...

Date	Item	Balance available
05-Nov-2008	Payment received	50.00

... will be used in payment of :

Date	Item	Unpaid balance	G.S.T.	Allocate
05-Nov-2008	Testing 2	50.00		50.00

\* Priority order is the order which debts are to be paid via autopayments

Figure 145: The confirmation settings

Click 'Proceed' and the transaction will show as below (Figure 146):

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount
05-Nov-2008	6934	Payment received		50.00
05-Nov-2008	Counter	Testing 2	50.00	
	<b>Balance</b>	<b>G.S.T.</b>	<b>St.</b>	<b>Ledger</b>
			A	1 Cash
			Y	

Figure 146: The transaction displayed

The batch report page 1 shows a 'Payment via allocation' (Figure 147). Page 2 shows the payment under 'Other' (Figure 148) and page 3 shows the movement of Unallocated money to Allocated (Figure 149).

Date	Time	User	Student	Teach	Form	Transaction	Item
05/11/2008	11:57:27	MUSAC MUSAC	BAE,JOON	12	10GS	Counter Item upaid	Testing 2
05/11/2008	13:32:41	MUSAC MUSAC	BAE,JOON	12	10GS	Payment via allocation	Testing 2

Amount	GST	Ledger	Method	Batch
50.00	0			654
50.00	0.00		via allocation	654

Figure 147: The batch report transaction list

### Other

Journal	0.00
Exemption	0.00
Credit	0.00
Discount	0.00
Transfer	0.00
Refund paid out by cheque	0.00
Refund not paid out	0.00
Refund of credit balances by cheque	0.00
Allocation of credit balances to existing debts	50.00
<b>Other subtotal</b>	<b>50.00</b>

Figure 148: The transaction totals

### Batch Item Analysis - GST Inclusive

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	50.00		(50.00)			

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing 2		50.00								50.00	
<b>Ledger total</b>		<b>50.00</b>								<b>50.00</b>	
<b>Grand totals</b>		<b>50.00</b>								<b>50.00</b>	

Figure 149: The batch report item analysis



Bulk payment of all outstanding debts = if a student has several debts then it is possible to handle the payment of all of them via a single click. There is no need to select the outstanding debts.

A student's page may look like the one below (Figure 150).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount
05-Nov-2008	Counter	Testing	33.00	
05-Nov-2008	Counter	Testing 2	50.00	

Figure 150: The transaction displayed

Click 'C', and the following page will appear (Figure 151).

**Confirmation of payment of all outstanding items**

**Items paid**

Item	Cost	GST	Ledger
Testing	33.00	3.67	27
Testing 2	50.00		

Transaction total: 83.00

Payment received: 83.00

Payment balance:

If the payment made covers more than the amount due then the surplus will be retained as an unallocated balance against item :

Either  Print receipt or  don't print

Receipt:

Method:

Figure 151: The confirmation settings

After clicking 'Proceed' the student's page will show as below (Figure 152).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount
05-Nov-2008	Counter	Testing	33.00	
05-Nov-2008	Counter	Testing 2	50.00	
05-Nov-2008	6935	Payment received		83.00

Balance	G.S.T.	St.	Ledger	Method
	3.67	Y		27
		Y		
	3.67	A		1 Cash

Figure 152: The transaction displayed

The first page of the report will show the payment information (Figure 153). The second page will show the payment under 'Banking' (Figure 154). Page 3 will show the payments and the items that were paid (Figure 155).

Date	Time	User	Student	Teach	Form	Transaction	Item
05/11/2008	14:20:58	MUSAC MUSAC	BAGLEY, SOLOMON	11	11CY	Full payment at the counter	Testing
05/11/2008	14:20:58	MUSAC MUSAC	BAGLEY, SOLOMON	11	11CY	Full payment at the counter	Testing 2

Amount	GST	Ledger	Method	Batch
33.00	3.67	27	Cash	656
50.00	0.00		Cash	656

Figure 153: The batch report transaction list

### Banking

Cheque	0.00
Cash	83.00
Refunds paid in cash	(0.00)
<b>Banking Subtotal</b>	<b>83.00</b>

Figure 154: The transaction totals

### Batch item analysis

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	170.00	15.55			170.00	15.55

Item	Ledger	Paid	G.S.T.	Disc/Exmt/Cred	G.S.T.	Refunded	G.S.T.
Test item	0275	100.00	11.11				
Item 2	0276	40.00	4.44				
Item 3	0277	30.00					
Grand totals		170.00	15.55				

Item	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Test item	(100.00)	(11.11)		
Item 2	(40.00)	(4.44)		
Item 3	(30.00)			
Grand totals	(170.00)	(15.55)		

Figure 155: The batch report item analysis

*Payments in advance via auto-payments = a series of payments spread out over the year.*

Via the individual student's screen auto payments can be set up by clicking 'Automatic payment' in the tool bar. These payments can be registered in one of three ways, 1) payments in advance which will show as unallocated payments until applied to a debt by the user 2) payments in advance which will automatically be applied to any outstanding debt on a particular item (otherwise they appear as unallocated payments), 3) payments in advance which will be automatically applied against outstanding debts in a selection of predetermined items in priority order (otherwise they appear as unallocated payments).

Once auto payments have been processed they will appear on the students page (Figure 156). In this case option 1 from above has been chosen. So the payments will appear as unallocated credits. The other 2 options will show in a similar way as the first in the batch reports.

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount
12-Oct-2008	7067	Payment received	
26-Oct-2008	7068	Payment received	
09-Nov-2008	7069	Payment received	

Cr Amount	Balance	G.S.T.	St.	Ledger	Method
20.00	20.00 Cr		U		1 Automatic paymen
20.00	20.00 Cr		U		1 Automatic paymen
20.00	20.00 Cr		U		1 Automatic paymen

Figure 156: The transaction displayed

The batch report page 1 will show the Transaction as Advance via autopayment (Figure 157). Page 2 will show the payments under Non Banking (Figure 158) and page 3 will show the payment in the Unallocated column (Figure 159).

Date	Time	User	Student	Teach	Form	Transaction
14/11/2008	10:04:31	MUSAC MUSAC	BAKER, DOUG	10JH	10JH	Advance via autopayment
14/11/2008	10:04:31	MUSAC MUSAC	BAKER, DOUG	10JH	10JH	Advance via autopayment
14/11/2008	10:04:31	MUSAC MUSAC	BAKER, DOUG	10JH	10JH	Advance via autopayment

Item	Amount	GST	Ledger	Method
Payment received	20.00		1	Automatic payment
Payment received	20.00		1	Automatic payment
Payment received	20.00		1	Automatic payment

Figure 157: The batch report transaction list

### Non-Banking

Credit card	0.00
VISA	0.00
Mastercard	0.00
EFTPOS	0.00
Automatic payment	60.00
<b>Non-Banking subtotal</b>	<b>60.00</b>

Figure 158: The transaction totals

### Batch Item Analysis - GST Inclusive

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1			60.00		60.00	

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
<b>Ledger total</b>								<b>60.00</b>			
<b>Grand totals</b>											

Figure 159: The batch report item analysis

*Global invoicing = bulk invoicing of a debt to a group of students.*

This is done via Invoicing from the Student Finances menu. Users can print invoices at the same time but this is optional. The student's transaction page will show the debts (Figure 160).

The batch report will show all students billed with the Transaction column showing 'Global invoicing' on page 1 (Figure 161), page 2 will show all zeros due to no payments being received at the time and page 3 will show the items and the amounts unpaid (Figure 162).

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance
14-Nov-2008	12456	Testing	33.00		33.00 Dr
14-Nov-2008	12456	Testing 2	50.00		50.00 Dr

Figure 160: The transaction displayed

Date	Time	User	Student	Teach	Form	Transaction
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, JESS	13	1306	Global Invoicing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, JESS	13	1306	Global Invoicing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, MELISSA	11	1100	Global Invoicing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, MELISSA	11	1100	Global Invoicing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, MIKE	12	120N	Global Invoicing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, MIKE	12	120N	Global Invoicing

Item	Amount	GST	Ledger	Method
Testing	33.00	3.67	27	Global Invoicing
Testing 2	50.00	0.00		Global Invoicing
Testing	33.00	3.67	27	Global Invoicing
Testing 2	50.00	0.00		Global Invoicing
Testing	33.00	3.67	27	Global Invoicing
Testing 2	50.00	0.00		Global Invoicing

Figure 161: The batch report transaction list

Batch Item Analysis - GST Inclusive

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1						

Item	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testing 2								150.00		150.00	
<b>Ledger total</b>								<b>150.00</b>		<b>150.00</b>	
Testing	27							99.00	11.01	99.00	11.01
<b>Ledger total</b>	<b>27</b>							<b>99.00</b>	<b>11.01</b>	<b>99.00</b>	<b>11.01</b>
<b>Grand totals</b>								<b>249.00</b>	<b>11.01</b>	<b>249.00</b>	<b>11.01</b>

Figure 162: The batch report item analysis

## 18 Financial Utilities

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### 18.1 An overview of the utilities

Management of students' transactions and configuration of billable items and financial defaults have been covered, the other processes associated with student finances including the global processing of automatic payments, printing of various documents (including invoices, statements, ledger and item summaries), lists of debts and payments, and 'not issued' receipts. The remaining utilities are covered below:

- 1 the consolidation process, which most schools use at the end of the year, but which some use much more frequently,
- 2 the sending of batch files of receipts to the MUSAC Accounts package; and
- 3 the design and editing of financial documents – invoices, statements and receipts.

### 18.2 Processing auto-payments

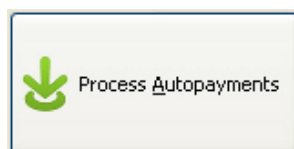


Figure 163: Process Auto Payments button

Auto-payments are set up, student by student, via the student's financial transaction screen, as described in chapter 20. To process these 'future payments' click the above button (Figure 163) from the Student Finances menu.

The following screen will appear (Figure 164).

**Step 1** = Select the date range of the payments to view then click 'List payments'. The screen will populate with the payments and the user can then check these against the bank statement to ensure they have been received.

**Step 2** = If payments haven't been received, highlight the payment and click 'Postpone'. This will stop the payment from processing and it can be followed up with the parent/caregivers. Once the payment has been received highlight it and click 'Reinstate'. If the payment is not received the option to cancel the payment permanently will appear once 'Proceed' is clicked (Figure 165).

**Step 3** = Receipts can be printed at the same time. Select the design from the drop down or click 'Don't print receipts.rec no. issued'.

**Step 4** = Once all is correct, click 'Proceed'.

As explained earlier in Chapter 20, auto payments can be allocated to debts. Click 'Autopayment priorities' to allocate if required (Figure 166).

Date	Student	Amount	Item	Receipt detail
12/10/2008	BAMFORD, JOSH	20.00	Payment received	AP
26/10/2008	BAMFORD, JOSH	20.00	Payment received	AP
9/11/2008	BAMFORD, JOSH	20.00	Payment received	AP
12/10/2008	BARAGWANATH, MACK	15.00	Payment received	AP
26/10/2008	BARAGWANATH, MACK	15.00	Payment received	AP
9/11/2008	BARAGWANATH, MACK	15.00	Payment received	AP
12/10/2008	BARBER, MILTON	10.00	Payment received	AP
26/10/2008	BARBER, MILTON	10.00	Payment received	AP
9/11/2008	BARBER, MILTON	10.00	Payment received	AP
12/10/2008	BARNHILL, BRETT	5.00	Payment received	AP
26/10/2008	BARNHILL, BRETT	5.00	Payment received	AP
9/11/2008	BARNHILL, BRETT	5.00	Payment received	AP

**Step 1** Specify the two dates

Process autopayments due between

and

Then click...

**Step 2** Make adjustments to the list as necessary

Adjust the amounts being received...

Or highlight payments to be postponed and click...

Or reverse cancellations.

(Hold down Ctrl and click to multi-select)


**Step 3** Receipting details

Don't print receipt. rec no. issued

Print receipts

**Step 4** Click

Figure 164: The auto-payment processing screen



You have postponed some payments  
Do you wish to make these permanent cancellations

Figure 165: Postpone cancellation

The screenshot shows a web interface for processing autopayments. At the top, there are two tabs: 'Autopayment priorities' and 'Process autopayments'. Below the tabs, a message reads: 'Select those billables items which are to be paid by autopayment. The items should be selected in priority order.' The interface is divided into two main sections. On the left, under 'Select items from:', there is a scrollable list of billable items including 'Testing', 'Testing 2', '9ART - Term 1', '9ART - Term 2', '9ART - Term 3', '9ART - Term 4', 'School (2+)JH', 'School fees for 3 terms', 'School fees for 2 terms', 'School fees - 3 terms 2+', 'School JH', '10ART - Terms 1-2', '10ART - Term 3-4', 'Art Yr 11', 'Art Yr 11 - 3 Terms', 'Art Yr 12', 'Art Yr 13', 'Art for 3 terms', 'Art for 2 Terms', 'Photography Yr 12', 'Photography Materials', '9Performing Arts', '9Performing Arts - Term 2', '9Performing Arts - Term 3', '9Performing Arts - Term 4', '10Performing Arts', and 'School fees (1)JH'. On the right, under 'Selected items in order of priority:', there is a list of three items: 'Testing 2', 'Testing', and 'Photography Materials'. To the right of this list are three buttons: 'Move selected item up', 'Move selected item down', and 'Delete selected item'. At the bottom right of the interface is a 'Save' button.

Figure 166: The priority order of items to be paid

The payments will now show on the students transaction pages and if they haven't been already, can now be allocated to any debts students may have, otherwise they will show as unallocated credits to be used in the future.

### 18.3 Printing Invoices

Click 'Invoicing'. In order to globally invoice there are 4 steps.

#### *Step 1: Selection of the invoice (Figure 168)*

Choose to either print receipts or not. If no receipts are to be printed, an invoice number will be allocated to the debt as it is when printing. This allows debts to be tracked in reporting and so subsequent payments can be matched up. If printing invoices choose from the drop down list, the design required. Click 'Next'.

**Step 1 Selection of the invoice**

Select either :

Print no invoice(s)

Or select from :

Invoice 1.dmt

Make the Selected Invoice my Default

Figure 168: Selection of the invoice

### *Step 2: Selection of the items*

A list of the schools billable items will appear and users highlight the items to be invoiced. To select more than one item hold down the Ctrl button. If the item(s) selected are to be used more than once, click 'Remember these' and the selection will be highlighted for next time. Click 'Next'. There is a 'Back' button available if users wish to return to any previous steps.



**Step 2 Selection of the items**

Select the required items Hold Ctrl to multi-select

Detail	Cost	Status	Criteria
Testing	33.00	All students	
Testing 2	50.00	All students	
9ART - Term 1	5.00	O	9ART
9ART - Term 2	5.00	O	9ART
9ART -Term 3	5.00	O	9ART
9ART - Term 4	5.00	O	9ART
School (2+)JH	200.00	S	>3
School fees for 3 terms	100.00	S	>1
School fees for 2 terms	150.00	S	<2
School fees - 3 terms 2+	105.00	S	>1
School JH	300.00	S	2
10ART - Terms 1-2	10.00	O	10ART
10ART - Term 3-4	10.00	O	10ART
Art Yr 11	30.00	O	11ART
Art Yr 11 - 3 Terms	23.00	O	11ART
Art Yr 12	30.00	O	12ART
Art Yr 13	30.00	O	13ART
Art for 3 terms	23.00	O	ART
Art for 2 Terms	15.00	O	ART

<p>All students</p> <p>Y = Year</p> <p>H = Teach</p> <p>V = Form</p> <p>S = Sibling count</p> <p>E = Eldests only</p> <p>Y = Youngests only</p> <p>O = Option class</p> <p>L = Popup entry</p> <p>A = Ask how many</p>	<p>No criteria. Items will be applied to all students in the current filter</p> <p>Year sought</p> <p>Class sought</p> <p>Group sought</p> <p>e.g. 1 or &gt;2</p> <p>Y or N</p> <p>Y or N</p> <p>e.g. 12MAT</p> <p>Requested entry</p> <p>No criteria. Number will be requested</p>
--	---

Number of items selected : 0

Figure 169: Selection of items to be invoiced

### Step 3: Selection of the students

The program will default to your current filter and all those students will show in the list. Users can refine the filter by clicking 'Apply further restrictions to the current filter'. This will show the standard filter that is available. To select students to be invoiced either, hold down the Ctrl button and click each student, click and drag to select a group or click 'Select all'. The option to filter for the eldest in the family is also available but this will only work if Steps 1 to 4 have been processed in 'Family Utilities' (this is available via 'Utilities' from the main menu in Student Manager. Once students have been selected, click 'Next'. Again 'Back' is available if users need to review chooses made previously.

### Step 3 Selection of the students

Students in the current filter (shown)  
You may select individual students from those listed

Filter for just eldests only

Apply further restrictions to the current filter

N.B. Only students who are members of your current filter will be displayed.

Remember that to select more than one student either click and drag or hold down Ctrl and click

Student	Year	Teach	Form	
XXXXXXXXXXXX	12	11	115F	<input type="checkbox"/>
XXXX-XXXX	10	10JH	10JH	<input type="checkbox"/>
XXXX-XXXX	12	11	11LS	<input type="checkbox"/>
XXXXXXXXXXXX	14	13	135N	<input type="checkbox"/>
XXXXXXXXXXXX	12	11	11MP	<input type="checkbox"/>
XXXX-XXXX	13	12	12PE	<input type="checkbox"/>
XXXXXXXXXXXX	13	12	12BR	<input type="checkbox"/>
XXXX-XXXX	13	12	12SP	<input type="checkbox"/>
XXXXXXXXXXXX	11	10VR	10VR	<input type="checkbox"/>
XXXXXXXXXXXX	13	12	12BD	<input type="checkbox"/>
XXXXXXXXXXXX	14	13	13KN	<input type="checkbox"/>
XXXX-XXXX	10	10JH	10JH	<input type="checkbox"/>
XXXXXXXXXXXX	12	11	11KL	<input type="checkbox"/>
XXXX-XXXX	14	13	135N	<input type="checkbox"/>
XXXX-XXXX	11	10HD	10HD	<input type="checkbox"/>
XXXXXXXXXXXX	13	12	12BD	<input type="checkbox"/>
XXXX-XXXX	10	10JH	10JH	<input type="checkbox"/>
XXXX-XXXX	12	11	11PC	<input type="checkbox"/>
XXXX-XXXX	10	10JH	10JH	<input type="checkbox"/>
XXXX-XXXX	12	11	11CY	<input type="checkbox"/>
XXXX-XXXX	12	11	11KL	<input type="checkbox"/>
XXXXXXXXXXXX	TIH 14	13	13BT	<input type="checkbox"/>
XXXX-XXXX	13	12	12PE	<input type="checkbox"/>
XXXX-XXXX	13	12	12ON	<input type="checkbox"/>
XXXX-XXXX	11	10KG	10KG	<input type="checkbox"/>
XXXXXXXXXXXX	11	10HD	10HD	<input type="checkbox"/>
XXXXXXXXXXXX	14	13	13GR	<input type="checkbox"/>
XXXXXXXXXXXX	12	11	11LW	<input type="checkbox"/>
XXXXXXXXXXXX	10	10JH	10JH	<input type="checkbox"/>

Figure 170: Selection of the students

### Step 4: Final decisions (Figure 171)

This screen shows how many items will be invoiced to how many students. This screen allows users to review choices made previously before proceeding. If there are any changes needed, use the 'Back' button to do so. If the details look ok, click 'Proceed'. Students will be invoiced if they fit the criteria of the billable items details and will be listed on the right hand side. A list of all the transactions will be saved to 'Print any Temporary List', which can be reviewed and printed at any stage. Users can now click the 'Back' button to return to Step 1 if further invoicing is to be done.

**Step 4 Final decisions**

Number of copies:

Number of first invoice:

Other restrictions:

Pause after printing every  documents  
(No entry means no pauses)

You are about to generate student debts which will involve :

Generate debts for (up to) 3 student(s)  
Up to 2 items will be invoiced to each student

ASHLEY  
Testing (33.00)  
Testing 2 (50.00)  
SOPHIE  
Testing (33.00)  
Testing 2 (50.00)  
FREYA  
Testing (33.00)  
Testing 2 (50.00)

Figure 171: Final confirmation before printing invoices

## 18.4 Printing reports

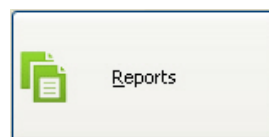


Figure 172: Reports button

In this area, users can obtain a variety of financial information from varying reports.

There are five major areas within financial reports (Figure 173) each has its own settings. The settings which a user makes will be remembered and, next time you return to the same report, those settings will already be in place.

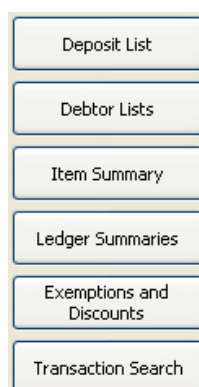


Figure 173: The reports menu

### Deposit List

The deposit list generates a list of deposits received according to the users selected criteria in each of the eight selection areas (Figure 174).

The screenshot shows a web form titled "Deposit list options" with several sections for configuring a report:

- Sort on:** Radio buttons for Pupil name (selected), Ledger number, Receipt number, and Date.
- Print:** Radio buttons for All deposits (selected), Between two receipt numbers, and Between two dates.
- Print by:** Radio buttons for All students (selected), Selected students, All by year level, All by Teach, and All by Form.
- Include:** Checkboxes for Full time students (checked), Part time students (checked), Pre-enrolments, and Leavers.
- Print:** Radio buttons for Full list (list paid items) (selected) and Short list (list payments).
- Payment method:** Checkboxes for Cheque, Cash, Credit card, Visa, Mastercard, Eftpos, Autopayment, Journal, Other, and Refunds. Cheque, Cash, Credit card, Visa, Mastercard, Eftpos, and Autopayment are checked.
- Include:** Radio buttons for All students (selected), Only eldests, and Only youngests.

A "Generate Report" button is located at the bottom right of the form.

Figure 174: The payments list options

Users have numerous options to generate their reports. Date and receipt number ranges can be used. Billable items can be chosen and a selected group of students can also be used. If using a group of students the 'Select Students' button will appear and by clicking this a list will be shown on the following page to select from (Figure 175). A filter can be used to narrow the selection down. Click the 'Select all' button or hold the 'Ctrl' button down and select the student required for the list.

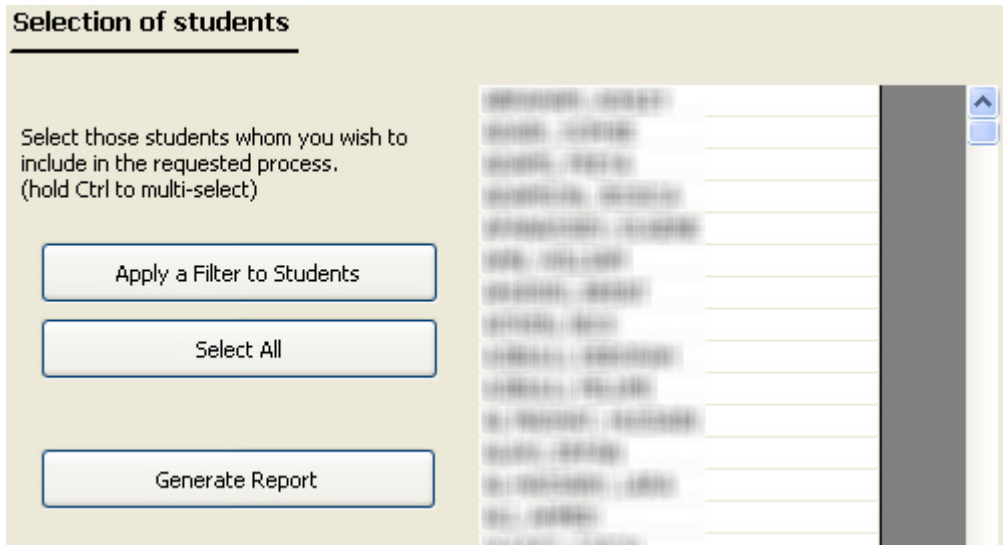


Figure 175: The selection of students

Once all choices have been made click 'Generate report'. The report will show on the screen (Figure 176) and users can choose whether to print the report or not. The first page of the report will show all the selections a user made for this report, as well as the name of the school and date. The final page will show the grand total of all deposits received.

**MUSAC Demonstration 03/03/2008**

**Deposit List (Full)**

All Items for selected students in the current filter, including Full time Part time  
Between receipt numbers 0000000 and 9999999  
Payment method(s) Cheque Cash Credit card Visa Mastercard Eftpos Autopayment

Student	Teach	Form	Date	Receipt	Method	Item	Amount	Total
	11	11 SF	01/01/2008	6936	Automatic payment	Unallocated payment balance	10.00	
			15/01/2008	6937	Automatic payment	Unallocated payment balance	10.00	
			29/01/2008	6938	Automatic payment	Unallocated payment balance	10.00	
			12/02/2008	6939	Automatic payment	Unallocated payment balance	10.00	
			25/02/2008	6674	Cheque	School JH	200.00	
			25/02/2008	6675	Cheque	Stationery	51.20	

Figure 176: S (short) payments list

Debtor Lists

A Debtors list is used to view those students who still have outstanding debts. This report also has numerous options for users (Figure 177).

Figure 177: The Debtor list settings

This area will also print those students who have paid a billable item(s). There is 'Simple List' available under the 'List Type', once this is selected all the other options will be greyed out. When this report is generated it will include all students (in the current filter) and show a consolidated figure for credits and debts (Figure 178).

MUSAC Demonstration 03/03/2008

Simple List of Student Balances

Simple List of student balances for all students in the Current Filter

Student	Teach	Form	Debits	Credits	Balance
XXXXXXXXXXXXXXXXXXXX	11	11SF	699.20	(816.20)	(117.00)
XXXXXXXXXXXXXXXXXXXX	10JH	10JH	404.00	(765.00)	(361.00)
XXXXXXXXXXXXXXXXXXXX	11	11LS	1,204.00	(430.00)	774.00
XXXXXXXXXXXXXXXXXXXX	13	13SN	821.00	(1,855.00)	(1,034.00)
XXXXXXXXXXXXXXXXXXXX	11	11MP	321.00	(105.00)	216.00
XXXXXXXXXXXXXXXXXXXX	12	12PE	397.30	(272.00)	125.30

Figure 178: A list of debtors

### Item Summary

This report will give users detailed information on each billable item, ie: how much has been paid, the GST content etc. The selections available for this report have been narrowed down compared to the previous reports (Figure 179).

#### Item list options

List type

Detailed list

Simple List for Students in the Current Filter

List order

Item list order

Alphabetical order

Show

Percentage paid

Percentage unpaid

Gst inc / exc

Gst inclusive amounts

Gst exclusive amounts

Budget options

\* Budget options are only available if amounts are Gst exclusive

Include budget details

Exclude budget details

Figure 179: The Item summary settings

An example of this list is shown below (Figure 180).

#### MUSAC Demonstration 03/03/2008

#### Item list

N.B. Amounts are EXCLUSIVE of G.S.T.

Item	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.	% Allid	Budget	Balance	% Inv	% Recd
Payment received	1	42278.15	(88.71)	6102.23		48380.38	(88.71)	87.39				

Item	Ledger	Paid	G.S.T.	Disc/Exmt	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Invoiced	G.S.T.	% Paid
School fees (1)JH	01	8068.00		175.00				18422.00		26490.00		30.46
School (2+)JH	01	2210.00						6480.00		8690.00		25.43
School fees for 3 terms	01	265.55		60.00				1434.45		1700.00		15.62
School fees for 2 terms	01	150.00		40.00				1150.00		1300.00		11.54

Figure 180: An item summary

## Ledger Summary

The purpose of this list is to allow a user to obtain a summary of transactions grouped by ledger subgroup, ledger, or ledger group (Figure 181).

Figure 181: The ledger summary settings

The option to choose a 'Simple Summary' is available just as the previous report. An example of a ledger summary is shown below (Figure 182).

### MUSAC Demonstration 03/03/2008

### Simple Ledger Summary

Transactions for all students in the Current Filter

N.B. Amounts are INCLUSIVE of G.S.T.

Ledger	Item	GST %	Invoiced	Adjustments (Disc/Exmpt/Refunds)	Total	Received	Not Received
01	School fees (1)JH	0.00	1,770.00	(175.00)	1,595.00	0.00	1,595.00
01	School (2+)JH	0.00	1,340.00	(0.00)	1,340.00	430.00	910.00
01	School fees for 3 terms	0.00	980.00	(60.00)	920.00	205.55	714.45
01	School fees for 2 terms	0.00	980.00	(40.00)	940.00	150.00	790.00
01	School fees - 3 terms 2+	0.00	420.00	(105.00)	315.00	210.00	105.00
01	School JH	0.00	3,200.00	(420.00)	2,780.00	1,075.00	1,705.00
	<b>Ledger 01</b>		<b>8,690.00</b>	<b>(800.00)</b>	<b>7,890.00</b>	<b>2,070.55</b>	<b>5,819.45</b>

Figure 182: A ledger summary



### Exemptions and Discounts

This report allows users to obtain a list of those students who have been given discounts or who have been exempted from payment for all or selected items (Figure 183).

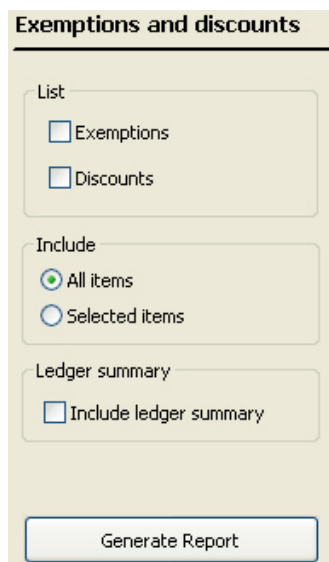


Figure 183: Exemptions and discounts settings

An example of this is shown below (Figure 184).

#### MUSAC Demonstration 03/03/2008

#### Exemptions Discounts

Student	Teach	Form	Date	Receipt	Method	Item	Amount	Total
ADAMS, FREYA	11	11LS	08/10/2008	Note	Exemption	School fees (1)JH	175.00	175.00
AJIBULU, DEBORAH	10VR	10VR	15/02/2008	Note	Exemption	School fees for 3 terms	60.00	
			15/02/2008	Note	Exemption	School fees for 2 terms	40.00	
			15/02/2008	Note	Exemption	School fees - 3 terms 2+	105.00	205.00
ALLAN, JAMES	10JH	10JH	16/10/2008	Note	Exemption	Testing 2	50.00	50.00
ALMEIDA DE CARVALHO, TIH	13	13BT	10/10/2008	Note	Discount	Testing	16.50	16.50
AU YEUNG, SCOTT	11	11UD	02/11/2008	Note	Discount	Testing 2	25.00	25.00
AUGUSTO, RAFAEL	12	12CK	02/11/2008	Note	Discount	Testing 2	25.00	25.00
BOYED, ARIANA	10BG	10RA	11/08/2008	Note	Exemption	Uniform tie	20.00	20.00

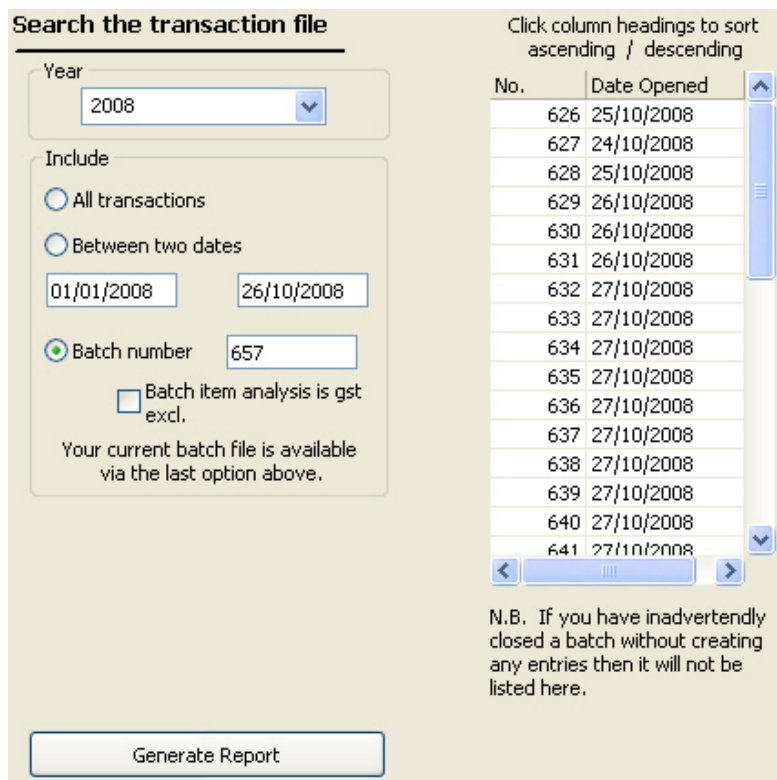
Totals

Total exemptions	450.00	
Total discounts	66.50	
<b>Grand total</b>		<b>516.50</b>

Figure 184: A sample list

### Transaction Search

The purpose of this list is to allow you to reprint a Batch Report or a list of transactions within a date range (Figure 185). Simple select the date range or batch number and the report will show on the screen once the 'Generate report' button is clicked.



**Search the transaction file**

Year: 2008

Include:

- All transactions
- Between two dates  
01/01/2008 26/10/2008
- Batch number: 657  
 Batch item analysis is gst excl.

Your current batch file is available via the last option above.

Generate Report

Click column headings to sort ascending / descending

No.	Date Opened
626	25/10/2008
627	24/10/2008
628	25/10/2008
629	26/10/2008
630	26/10/2008
631	26/10/2008
632	27/10/2008
633	27/10/2008
634	27/10/2008
635	27/10/2008
636	27/10/2008
637	27/10/2008
638	27/10/2008
639	27/10/2008
640	27/10/2008
641	27/10/2008

N.B. If you have inadvertently closed a batch without creating any entries then it will not be listed here.

Figure 185: Transaction search

## 18.5 Printing temporary lists

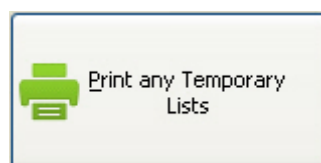


Figure 186: Temp List button

During the processing of transactions up to three temporary lists are generated. They may be offered for printing as you exit from the transaction screen, if the check box at the top of this screen was ticked. Otherwise these will be held until visiting this area (Figure 187).

**The following temporary financial files are available for printing**  Offer these printing form options at the end of every batch

<p><b>The list of items invoiced</b></p> <p>Items invoiced on 24/10/2008 at 8:17:12 a.m.</p> <p>Number of entries in file : 97</p>	<p>First entry on file</p> <p><input type="button" value="Print this file"/></p>
<p><b>The banking list</b></p> <p>27/10/2008 ANGKIRIWANG, ELBERT~</p> <p>Number of entries in file : 13</p>	<p>First entry on file</p> <p><input type="button" value="Print this file"/></p>
<p><b>The MUSAC Accounts ledger summary batch</b></p> <p>25/10/08 87810 Payment received 5.00 0.00 C</p> <p>Number of entries in file : 29</p>	<p>First entry on file</p> <p><input type="button" value="Print this file"/></p>

Figure 187: The 'Temporary lists' screen

There is also an 'Advanced Print Option' button at the bottom of the screen (Figure 188).

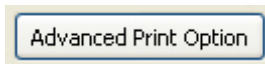


Figure 188: Advance Print Button

This will give users other reports to print (Figure 189). This area however is not available to all users only those with this right.

**The following Financial Transactions are available for printing**  Offer these printing form options at the end of every batch

<p><b>The list of items invoiced</b></p> <p>14/11/2008 12:21:25 ALAVI, ERFAN Testing 2 50.00 0.00</p> <p>Number of entries in file : 193</p>	<p>Last entry on file</p> <p><input type="button" value="Print transactions"/></p>
<p><b>The banking list</b></p> <p>05/11/2008 14:21:00 BAGLEY, SOLOMON 0.00 0.00</p> <p>Number of entries in file : 13</p>	<p>Last entry on file</p> <p><input type="button" value="Print transactions"/></p>
<p><b>The MUSAC Accounts ledger summary batch</b></p> <p>14/11/2008 11:10:07 87810 Payment received 5.00 0.00</p> <p>Number of entries in file : 794</p>	<p>Last entry on file</p> <p><input type="button" value="Print transactions"/></p>
<p><b>The Financial transaction list</b></p> <p>14/11/2008 12:21:25 MUSAC MUSAC ALAVI, ERFAN 50.00 0.00 663</p> <p>Number of entries in file : 806</p>	<p>Last entry on file</p> <p><input type="button" value="Print transactions"/></p>

Select only active transactions for this user.       Output to printer  
 Select active and deleted transactions for this user.       Output to screen  
 Select all Active transactions  
 Select all Active and Deleted transactions.  
 Select all transactions From Date - To Date      16/11/2008      16/11/2008  
 Select all transactions for Batch Number:      657     

Figure 189: Advanced Print Options

## 18.6 Printing statements

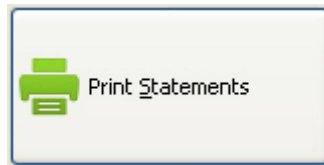


Figure 190: Print Statements Button

Depending on the statement being printed, this is a three or four step process.

**Note:** If you are emailing statements to caregivers, refer to 19.10, 'Designing financial documents', for instructions in 'Setup for 'Emailing Statement Caregivers' on 'Mail to Whom' setup.

### Step 1: Selection of statement and default settings (Figure 191)

**Step 1 Selection of the statement and default settings**

Statement 1.dmt

Number of copies: 1 copy

Number of first statement: 7130

Pause after printing every 50 documents (no entry means no pauses)

**Print**

- One statement per student
- One statement per family

**Autopayers**

- Include all students
- Include only non-autopayers

**Statement type**

- Traditional statement  Include full breakdown of payments  
Opening Balance  
All transactions since last balance  
Closing Balance recorded
- Full statement - including transactions between 01/01/2008 and 16/11/2008  
No Opening Balance  
Selected Unpaid Items  
Unallocated Payments received (if selected)

**Balances**

- Exclude those with nil or credit balances
- Exclude just those with nil balances
- Print all regardless of balances
- Print just those with outstanding

Make the Selected Statement my Default

Figure 191: Selection of statement and settings

**Note:** using the button at the bottom of the list of statements will allow users to set the selection as the default for subsequent printings.

There are two different statement formats to choose from :

- 1 Traditional statement: which provides an opening balance (the closing balance of the last statement), followed by all transactions since that date, ending with a current closing balance. When a traditional statement is printed then the closing balance is saved back to the database and will appear as a transaction on the student's screen. To review the contents of one of these statements click the statement number in the Inv/Rec column of the transaction screen.
- 2 Full statement: has a zero opening balance, and lists all transactions found on file which relate to selected items, ending with a closing balance. No closing balance is saved back to the student's screen. Only transactions dated between the two specified dates will be included.

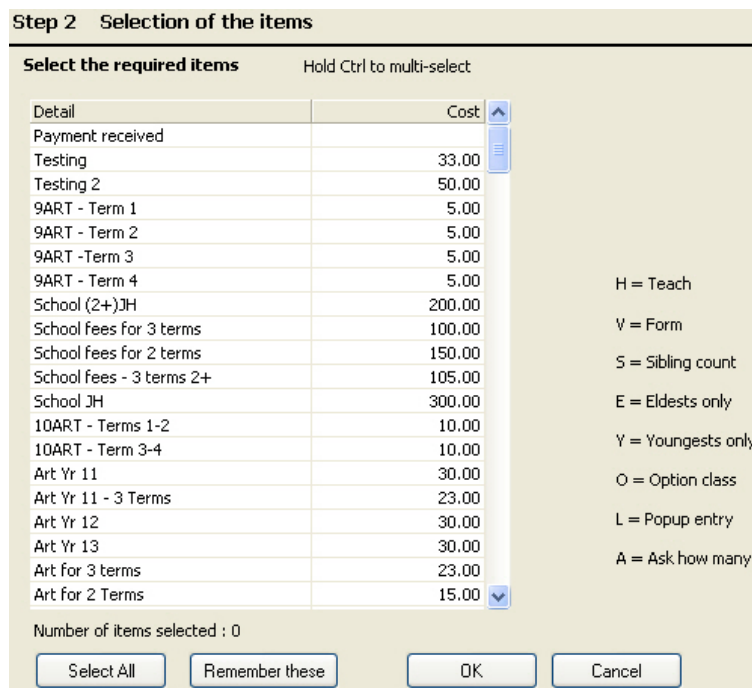
**Note:** if printing a traditional statement the choice to have any 'Payment received' entries expanded to provide a full breakdown on the details of what the particular payment was used for is available. This is done via the check box.

Users can select to print statements either by Family or by student. Each option will give you a different screen in Step 3.

Once a user has chosen the printing options click 'Next'.

### Step 2: Selection of the items

If a Full statement was selected in Step 1 then the second step will appear, allowing users to select those billable items to appear on the statement. Click 'Next' to go to Step 3.



Detail	Cost
Payment received	
Testing	33.00
Testing 2	50.00
9ART - Term 1	5.00
9ART - Term 2	5.00
9ART - Term 3	5.00
9ART - Term 4	5.00
School (2+)JH	200.00
School fees for 3 terms	100.00
School fees for 2 terms	150.00
School fees - 3 terms 2+	105.00
School JH	300.00
10ART - Terms 1-2	10.00
10ART - Term 3-4	10.00
Art Yr 11	30.00
Art Yr 11 - 3 Terms	23.00
Art Yr 12	30.00
Art Yr 13	30.00
Art for 3 terms	23.00
Art for 2 Terms	15.00

Number of items selected : 0

Buttons: Select All, Remember these, OK, Cancel

Legend:

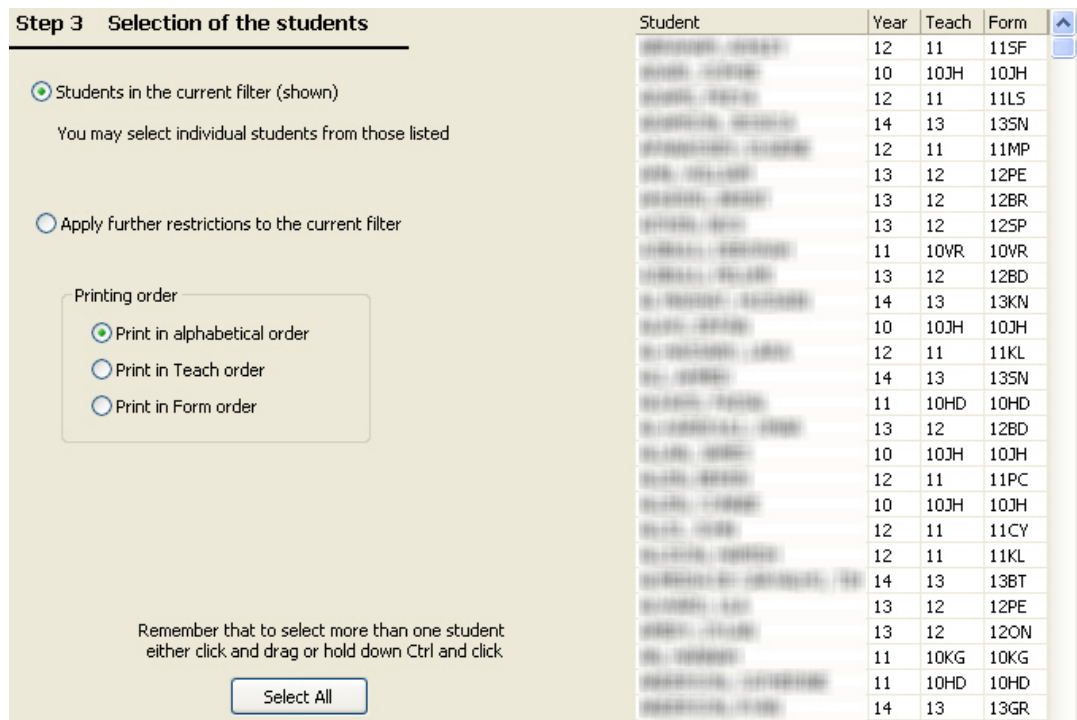
- H = Teach
- V = Form
- S = Sibling count
- E = Eldests only
- Y = Youngests only
- O = Option class
- L = Popup entry
- A = Ask how many

Figure 192: Selection of items for full statement

If a traditional statement was chosen then step 2 will be skipped, proceeding directly to step 3.

*Step 3: Selection of the students*

This is where users choose the students whom a statement will be printed if this is the option tagged in Step 1. Users can put further restrictions on the current filter for students by clicking this option on the screen. Once the display of students is correct either click 'Select all' or hold the Ctrl key down and highlight those needed.



Student	Year	Teach	Form
BRUNNEN, ANNE	12	11	115F
BRUNNEN, ANNE	10	10JH	10JH
BRUNNEN, ANNE	12	11	11LS
BRUNNEN, ANNE	14	13	13SN
BRUNNEN, ANNE	12	11	11MP
BRUNNEN, ANNE	13	12	12PE
BRUNNEN, ANNE	13	12	12BR
BRUNNEN, ANNE	13	12	12SP
BRUNNEN, ANNE	11	10VR	10VR
BRUNNEN, ANNE	13	12	12BD
BRUNNEN, ANNE	14	13	13KN
BRUNNEN, ANNE	10	10JH	10JH
BRUNNEN, ANNE	12	11	11KL
BRUNNEN, ANNE	14	13	13SN
BRUNNEN, ANNE	11	10HD	10HD
BRUNNEN, ANNE	13	12	12BD
BRUNNEN, ANNE	10	10JH	10JH
BRUNNEN, ANNE	12	11	11PC
BRUNNEN, ANNE	10	10JH	10JH
BRUNNEN, ANNE	12	11	11CY
BRUNNEN, ANNE	12	11	11KL
BRUNNEN, ANNE	14	13	13BT
BRUNNEN, ANNE	13	12	12PE
BRUNNEN, ANNE	13	12	12ON
BRUNNEN, ANNE	11	10KG	10KG
BRUNNEN, ANNE	11	10HD	10HD
BRUNNEN, ANNE	14	13	13GR

Figure 193: Selection of students

If by family was chosen in Step 1 then the screen below will appear (Figure 194). Instead of listing the students, a list of Families will show.

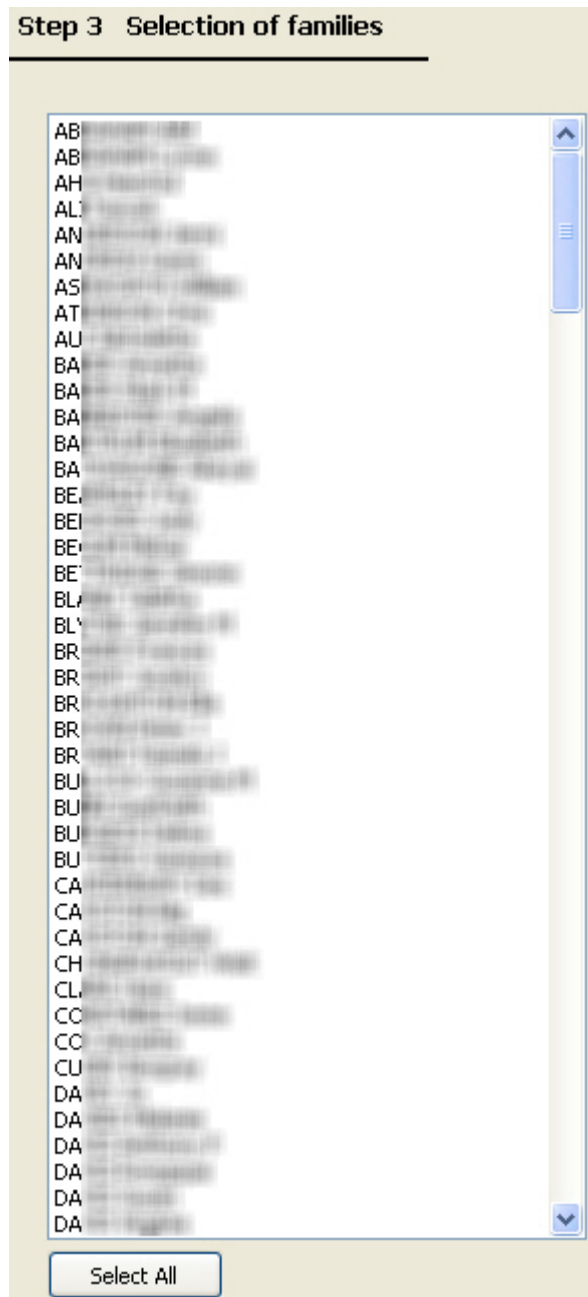


Figure 194: Selection of families

#### Step 4: Final decisions

Step 4 is where you finalise decisions (see below for emailing to caregivers) and confirm what they see on the screen by clicking 'Proceed'. If for some reason the screen is incorrect, click the back button to alter the selections. The box on the right will fill with the names of those students that it will print statements for as they print. A dialogue box will appear to say how many statements were printed also (Figure 196).

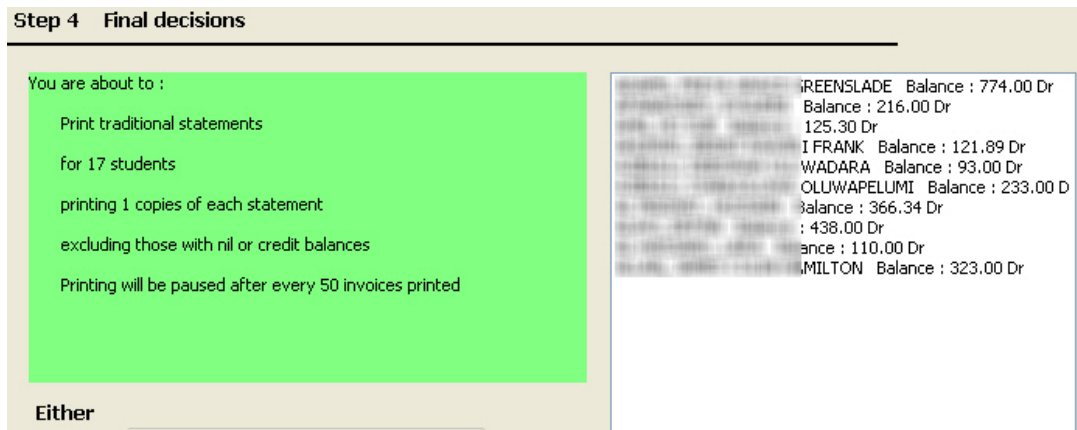


Figure 195: Final approval

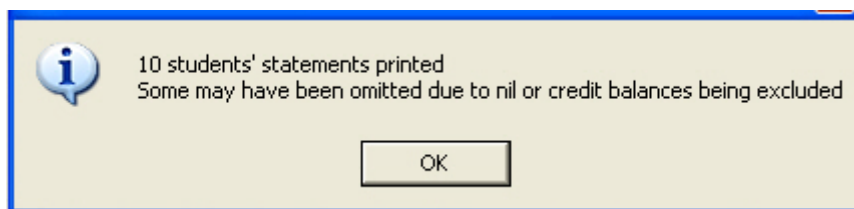


Figure 196: Dialogue Box

If a step was missed or an invalid entry made during the process the Final decisions screen display panel will NOT be green. It will be in red and the Proceed to print statement button will have disappeared. Use the 'Back' button to correct the steps.

Remember, if printing a 'traditional' statement rather than a 'full', the closing balance of each will be recorded against the student and will be displayed on their transaction screen.

#### *Step 4: Final decisions to email statement to caregivers*

For emailing Statements to caregivers, repeat Steps 1-3 above, see Step 1: Selection of statement and default settings (Figure 191).

Step 4 – click on "Save as PDF Files and Email to Caregivers" button.



**Printing statements**

**Step 4 Final decisions**

You are about to :

- Print statements relating to 111 selected items
- Print statements for transactions between 01/01/2009 and 14/05/2009
- for 1 students
- printing 1 copies of each statement
- printing all regardless of balances

**Either**

**Or**

**Or**

\* N.B. This process will include ALL items in determining debt

Send the resulting list to Excel

Create a tag list filter of listed students (this will replace any previous tag list generated via this process)

Musac, Musac A Balance : 0.00 Dr

The next screen will display the Student, Caregiver, Email address and Send columns. Under 'Send' column – tick the email addresses you want to send the statement to. You also have the choice of "Select All". If the Caregiver does not have an address you are not able to tick send.

**Printing statements**

Student	Caregiver	eMail address	Send
Musac, Musac A Balance : 0.00 Dr	A Musac Musac	musac@massey.ac.nz	<input checked="" type="checkbox"/>

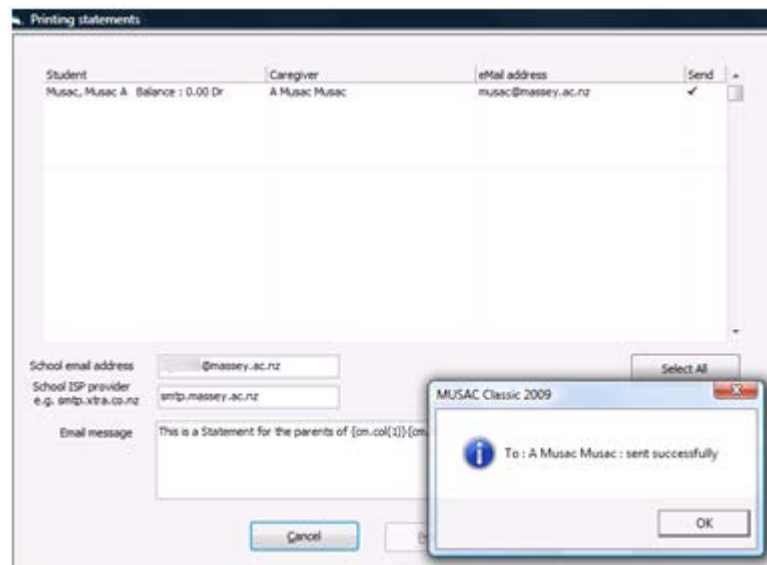
School email address

School ISP provider

SMTP e.g. smtp.xtra.co.nz

Email message

Check the school email address and school ISP provider are correct.  
Add a message which is automatically inserted into the email.  
Click "Proceed".  
A confirmation message will appear of the emails sent.



## 18.7 Printing receipts

As payments are received the option to either print or not print a receipt is given. In line with Audit requirements, even if electing not to print a receipt, the payment is still allocated a unique receipt number as soon as the transaction is saved back to the database. If choosing to delay the printing of receipts, this is where the printing of those receipts is performed. Receipts may also be reprinted from this area (Figure 198).

Click 'Print Receipts' button.



## 18.8 Consolidation

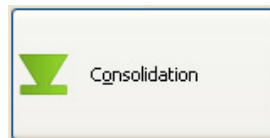


Figure 199: Consolidation button

There are 3 areas within Consolidation (Figure 200).

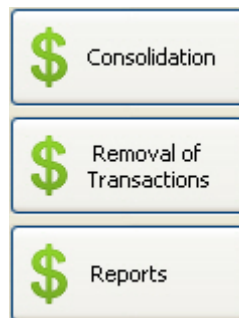


Figure 200: Consolidation areas

- 1 Consolidation - the end-of-year consolidation process. This process is used to remove any transactions which have been completed (ie. paid debts and allocated payments) and to amalgamate any outstanding debts to a single item eg. 'Debt balance carried forward'.
- 2 Removal of transactions - the ability to remove a set of transactions.
- 3 Report – when a consolidation is done a report is saved to the database and can be viewed in this area at any time.

### *The end-of-year consolidation process*

On entry to Consolidation, the main screen displays a set of notes relating to the consolidation process. These notes can be read onscreen or printed by clicking the print icon at the top of the screen. This screen is shown below (Figure 201).

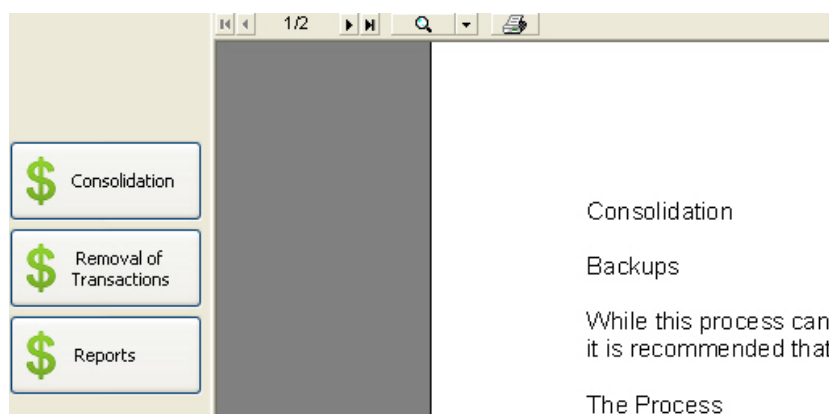


Figure 201: The consolidation screen showing the on-screen notes

## Notes on consolidation

### Backups

While this process cannot be performed if a backup has not been made within the last week, it is recommended that a backup be made immediately prior to performing a consolidation.

### The Process

The consolidation process allows the removal of redundant transactions from the financial transactions database. The process may be run first as a trial run, before being run as a final run. A trial run merely produces a report showing the effect that the full consolidation process will have on each student's transactions. No changes are made. The full process will only occur after the user confirms on the Confirmation screen that they would like to continue. The process involves several steps as set out below.

#### Step 1 – Tagging the Billable Items

This step involves indicating how transactions for each billable item will be treated. It is done by selecting the relevant code and tagging the item with that code.

When transactions are consolidated, any remaining balances on the transactions are combined and retained against either of two consolidated items for each student. GST items are consolidated together with other GST items while non-GST items are consolidated together.

To consolidate items:

- Tag billable items to be consolidated with a "C".
- Tag one item with an "I" to receive all the non-GST item balances.
- Tag one item with a "G" to receive all the GST item balances.

(The billable items tagged with an "I" or a "G" can be created specifically for this purpose and named to clearly indicate their nature.)

Other options are also available, namely -

- Retain all transactions against these items unchanged.
- Delete all transactions against these items regardless of their balances.
- Keep only the unpaid balance of transactions against these items.

(These items are NOT consolidated. The paid portion of the transaction is removed leaving just the unpaid debit balance.)

Payments Received are consolidated in the following way –The unallocated portion of all payments is consolidated into one unallocated payment transaction. Where a billable item has been tagged as "R", the payment relating to that item is retained as well.

Refunds transactions are removed by consolidation. They are handled in the following way – Refund Debits (i.e. paid out refunds) are removed by the consolidation as the transaction has been completed. Refund Credits (i.e. refunds not paid out) are also removed, but any unallocated portion of the credit is retained as part of the consolidated unallocated payment transaction. Where the item that is being refunded is to be retained (tagged with "R"), the refund is applied to the original transaction, and only the un-refunded balance will be retained.

### **Step 2 – Trial Run or Full Process**

This step involves indicated whether a trial run or the full process is required. The user must confirm at this point that they would like to continue, or they may press the back button to return to the previous screen.

### **Step 3 – The Process Itself**

Before the full process begins, a text file (tab-delimited), which includes a statement of all existing transactions for each student in the database, is generated. This file may be copied into Excel or Word to view the transactions. A Consolidation Report showing both pre- and post-consolidation transactions is created for both trial runs and the full processes and is available to view and print when the process has been completed. If the full process is being performed, a copy of this report is saved and may be viewed and printed from the "Reports" button. (This is not available for trial runs.) Consolidation process allows you to remove redundant transactions from your financial transactions database.

After reading the consolidation notes and doing a backup the decision on which items to be consolidated can be made. Enter the relevant code next to the item (Figure 202) and click 'Next'.

### Consolidation Step 1

Specify the process which you wish to apply to transactions involving each of the billable items.

Select from :

- C = consolidate
- I = Item to which Gst-exclusive items should be consolidated
- G = Item to which Gst-inclusive items should be consolidated
- K = Keep debts only
- R = Retain transactions unchanged
- D = Delete all transactions for this item

Statement balances will be reset to zero.

Use the Alt key in combination with a tag key to tag All items.

Tag	Item	G.S.T.
C	Payment received	
I	Testing	G
G	Testing 2	
D	9ART - Term 1	
R	9ART - Term 2	
R	9ART -Term 3	
R	9ART - Term 4	
D	School (2+)JH	
R	School fees for 3 terms	
R	School fees for 2 terms	
R	School fees - 3 terms 2+	
K	School JH	
R	10ART - Terms 1-2	
R	10ART - Term 3-4	
R	Art Yr 11	
R	Art Yr 11 - 3 Terms	
R	Art Yr 12	
R	Art Yr 13	
R	Art for 3 terms	
R	Art for 2 Terms	
R	Photography Yr 12	
R	Photography Materials	
R	9Performing Arts	
R	9Performing Arts - Term 2	
R	9Performing Arts - Term 3	
R	9Performing Arts - Term 4	
R	10Performing Arts	

Figure 202: The consolidation screen

The second step is to indicate whether to produce a trial run or proceed with the full process (Figure 203). Whichever way is chosen the user will be asked to confirm that decision by typing in 'yes' then click 'Proceed'

### Consolidation Step 2

Select from :

Trial run only

Consolidate

Are you SURE that you wish to proceed with a trial run? If so then type "Yes" and click "Proceed"

Figure 203: Trial run or actual process

The third step is the process itself.

During the full process, a text file will be generated which will include a transaction statement for each and every student in the database, before the consolidation occurs. This will list all existing transactions for each student. The file is 'tab-delimited' which means that it may be copied into Excel at any point, or loaded into a word processor from where a section of the file may be copied into Excel (Figure 204).

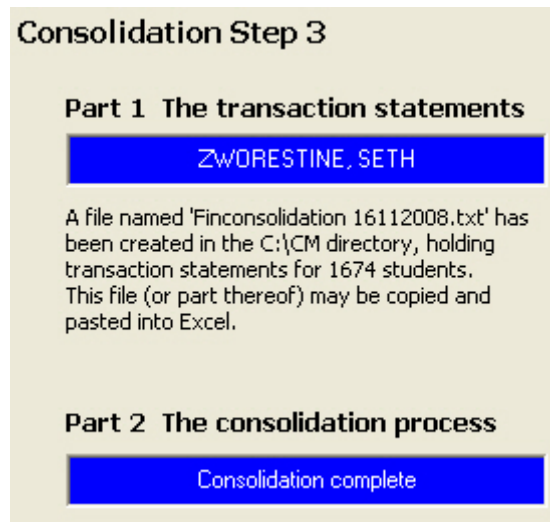


Figure 204: The progress screen

Once a full consolidation has been completed, the consolidation report can be reprinted or viewed again from the reports button. The consolidation report shows both pre- and post-consolidation transactions for every student (Figure 205). The student's transaction page will now show any consolidated amounts as one transaction line.



MUSAC Demonstration 03/03/2008 Consolidation

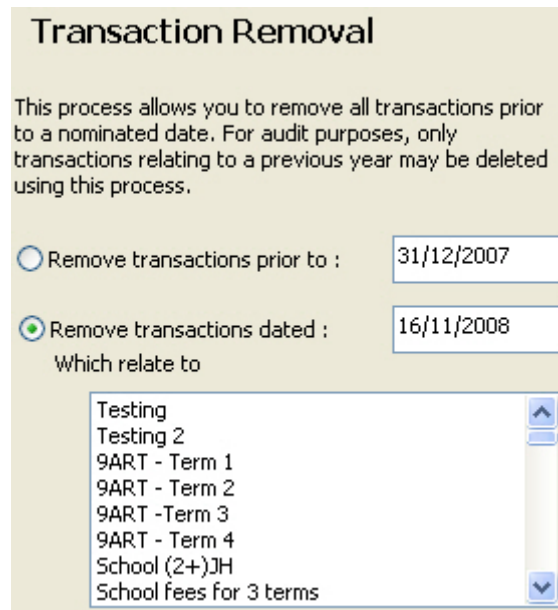
FULL CONSOLIDATION

Note	Date	Item	Dr Amount	Cr Amount	Balance	G.S.T
ABRAHAM, JOEL						
Pre-Consolidation						
Delete (Paid)	25/02/2008	School JH	200.00			
Delete	25/02/2008	9ART - Term 1	5.00			
Consolidate	25/02/2008	Payment received	0.00			
Consolidate	25/02/2008	Refund		105.00		
Delete (Refund Paid Out)	25/02/2008	Refund	105.00			
Consolidate	10/04/2008	Payment received	0.00			
Consolidate	10/04/2008	Payment received		10.00		
Consolidate	16/04/2008	Payment received	0.00			
Delete (Refund Paid Out)	05/06/2008	Refund	10.00			
Consolidate	25/07/2008	Payment received	0.00			
Consolidate	01/01/2008	Payment received		10.00		
Consolidate	01/02/2008	Payment received		10.00		
Consolidate	01/03/2008	Payment received		10.00		
Consolidate	01/04/2008	Payment received		10.00		
Consolidate	01/05/2008	Payment received		10.00	10.00 Cr	
Consolidate	01/06/2008	Payment received		10.00	10.00 Cr	
Consolidate	01/07/2008	Payment received		10.00	10.00 Cr	
Consolidate	01/08/2008	Payment received		10.00	10.00 Cr	
Consolidate	13/08/2008	Payment received		300.00	150.00 Cr	
Delete (Refund Paid Out)	13/08/2008	Refund	150.00			
Delete (Refund Paid Out)	15/08/2008	Refund	30.00			
Consolidate	15/08/2008	Payment received		25.00		
Delete (Refund Paid Out)	15/08/2008	Refund	10.00			
Consolidate	15/08/2008	Payment received		170.00		
Consolidate	01/09/2008	Payment received		10.00	10.00 Cr	
Consolidate	01/10/2008	Payment received		10.00	10.00 Cr	
Consolidate	01/11/2008	Payment received		10.00	10.00 Cr	
Post-Consolidation						
Consolidated	16/11/2008	Payment received		220.00	220.00 Cr	

Figure 205: The consolidation report screen

### Removal of Transactions

The preservation of the integrity of the audit trail is paramount for financial processes. However, from time to time, someone can accidentally bill the whole school an extra \$1000 each, when they only meant to bill a particular small group of students. Should this happen, it is possible to delete a set of transactions via this area (Figure 206).



**Transaction Removal**

This process allows you to remove all transactions prior to a nominated date. For audit purposes, only transactions relating to a previous year may be deleted using this process.

Remove transactions prior to : 31/12/2007

Remove transactions dated : 16/11/2008

Which relate to

- Testing
- Testing 2
- 9ART - Term 1
- 9ART - Term 2
- 9ART - Term 3
- 9ART - Term 4
- School (2+)JH
- School fees for 3 terms

Figure 206: The transaction removal screen.

Select the period concerned and the billable item concerned. Clicking 'Proceed' will bring up the following message (Figure 207). The user will need to contact MUSAC to obtain the password (which changes daily). MUSAC will ask that a letterhead fax be sent to them with the Principal or Deputy Principals signature on it with a reason for the code request. This is so both parties are covered if the school was to be audited.

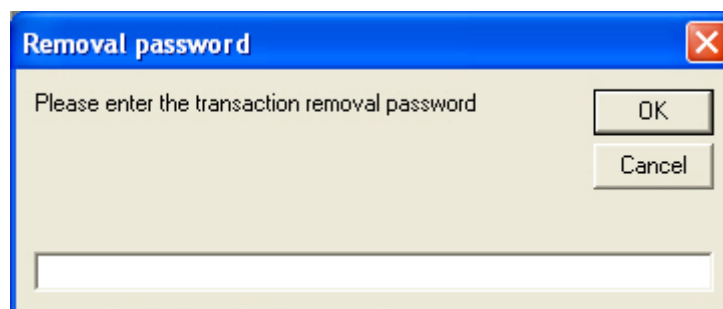


To remove transactions related to this date you must enter a password obtainable from MUSAC  
Prior to releasing this password, written approval must be gained from the principal of your school  
Please contact MUSAC at 06 350 9255 to request the password  
Do you wish to proceed

Yes No

Figure 207: The password warning

Once the password has been received click 'Yes' to the above and the password entry screen will be displayed (Figure 208).



**Removal password**

Please enter the transaction removal password

OK Cancel

Figure 208: Entry of the deletion password

Enter the password and the transactions will be deleted.

## 18.9 Sending batch files to MUSAC Accounts

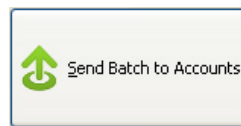


Figure 209: Send Batch to Accounts button

If, via financial defaults, a link to MUSAC's Accounts package has been set up then, as each payment is received, information relating to the transaction is recorded in a separate file. At a suitable point users can have this file sorted into ledger order and have the ledger totals of payments received passed to the accounts package for processing.

Click 'Send batch to Accounts'. If the correct link has been established then the following message will be displayed (Figure 210).

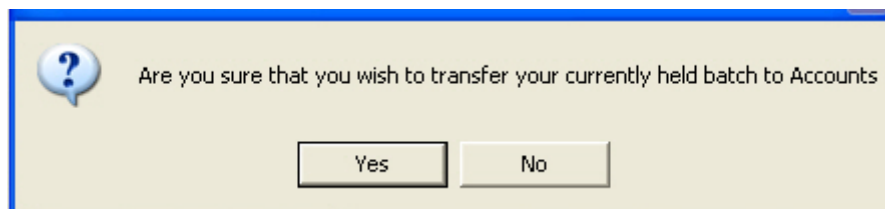


Figure 210: Approval to transfer

By clicking 'yes' a message similar to that shown below will be displayed (Figure 211).



Figure 211: The completed transfer message

Click 'OK' and the current batch totals (by ledger) will be sent to the Accounts package. At the conclusion of this process the temporary file of transactions will be cleared. To print the contents of this file at any stage go to 'Printing of temporary lists'.

## 18.10 Designing financial documents

Click 'Design Financial Documents' for access to design per-student financial documents, invoices, statements, credit notes and receipts.

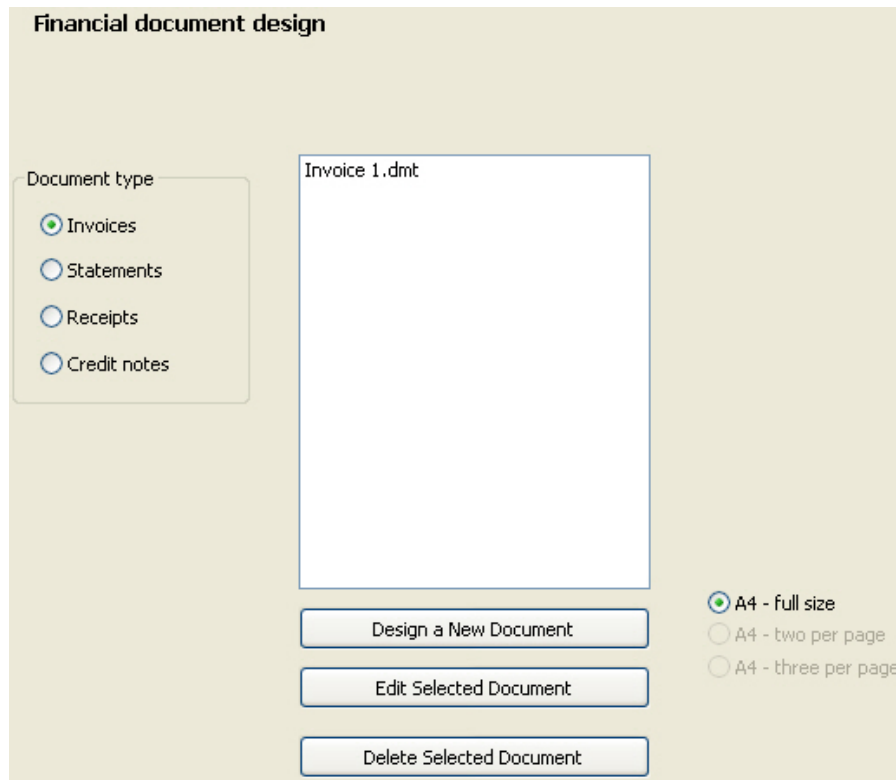


Figure 213: Selection of document type

The first screen provides the four choices, and by clicking each, a list of documents available will show.

This section does NOT cover all the finer details of document design. Those aspects which are specific to financial documents are covered.

For the purpose of this section we will work with a receipt. The other options follow a virtually identical process. Click 'Receipt' and a list of your receipt designs are given (Figure 214). To the right of the list are the three possibilities 'per page'. This choice does only apply to receipts. Invoices and statements may only be one per page.

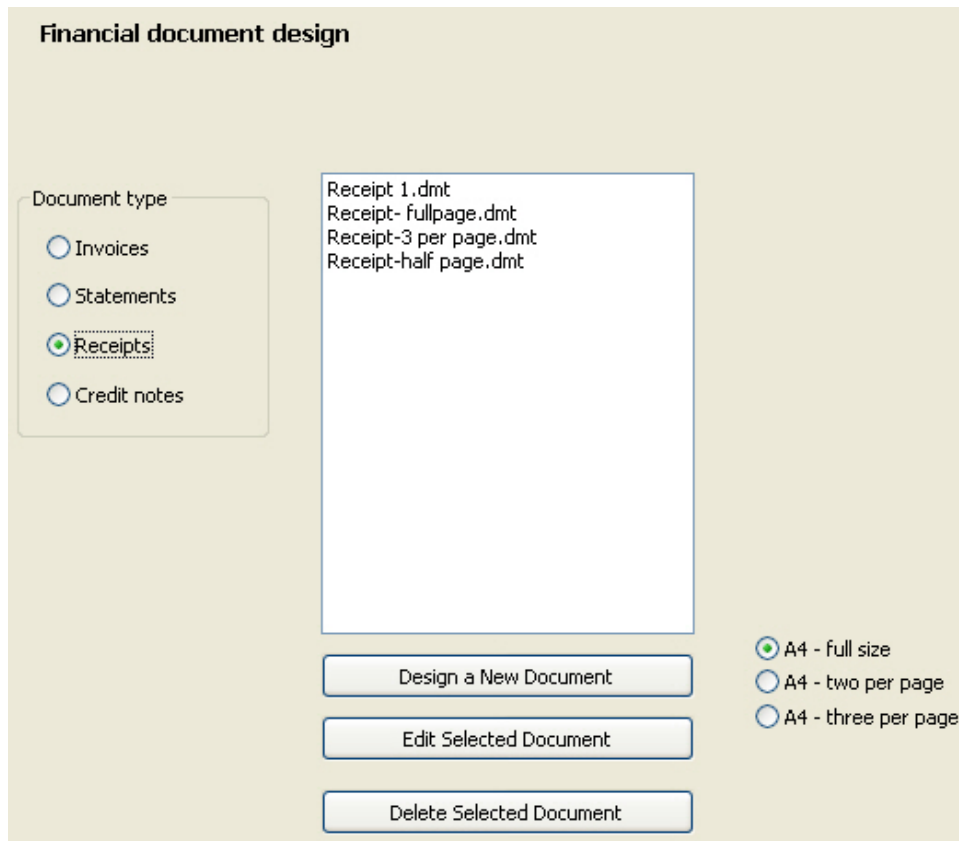


Figure 248: A new or existing document

This example is the 'Receipt - half page' document, highlight the document and click 'Edit selected document'. This takes me through to the design section, which appears as shown below (Figure 215).

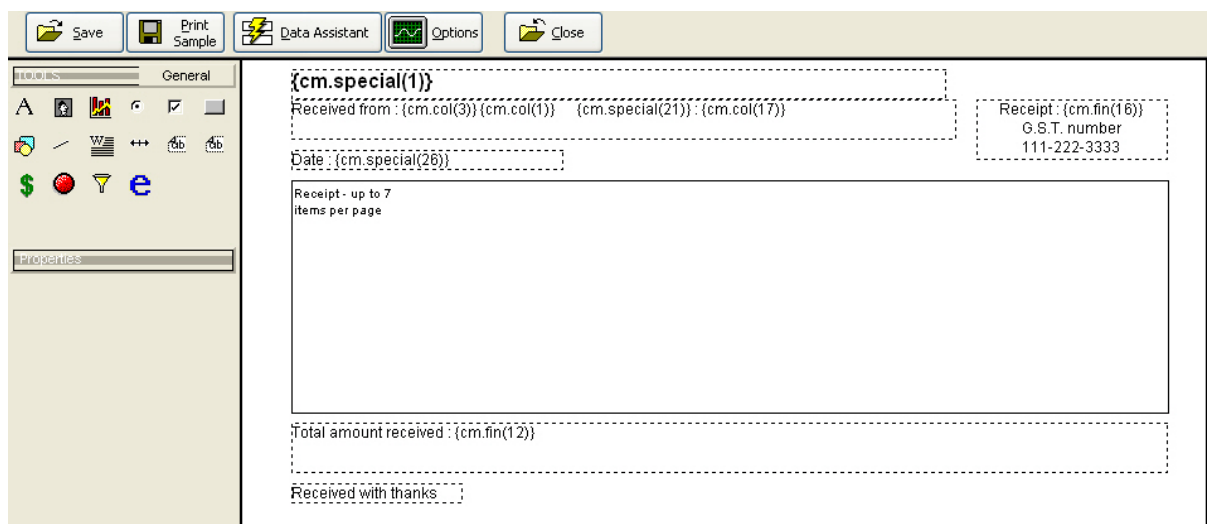


Figure 249: Editing a financial document

At the top of the screen are five buttons (see below):

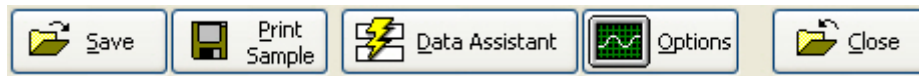


Figure 250: The top row buttons

1. Allows users to save changes made to a document.
2. Provides a 'print preview' of the current document.
3. Links to the database to create data entry areas for the document, but this is hardly applicable in the case of financial documents as you will not be using these documents for data entry.
4. Provides a set of processes which you can use in the design of documents - e.g. aligning components to the grid, turning the grid on or off etc.
5. The 'Exit' button for this area of the program, via which users return to the financial document design area.

At the left side of the screen is the 'tools' area, which contains all of the components which can be used to create documents. The two which we are mainly concerned with in the case of financial documents are the 'Word processor' (the W with lines) and the financial tool (the \$ sign).



Figure 251: The properties of the financial object

The rest of the screen is devoted to the document itself. Each area represents one of the 'tools', or 'objects'. An example of a document is shown below.

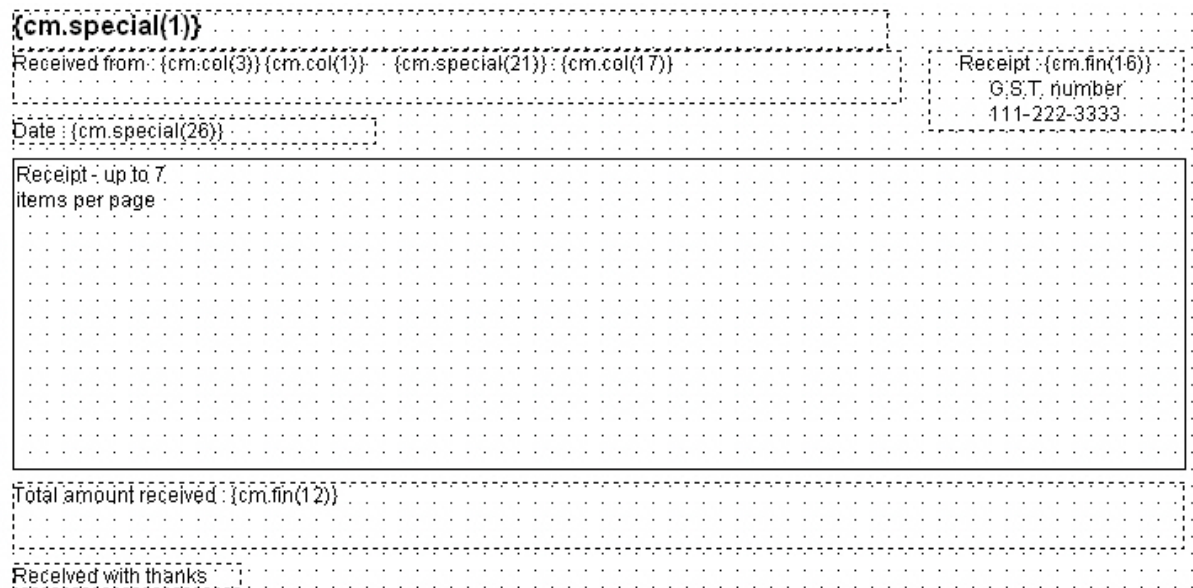


Figure 252: An example of a financial document

The rectangle with the word 'receipt' in the top left hand corner shows the area where the list of items received will be displayed (Figure 219). Small black squares will appear around the area to show that it has been selected and the properties of this area will show under the 'Tools' area (Figure 220).

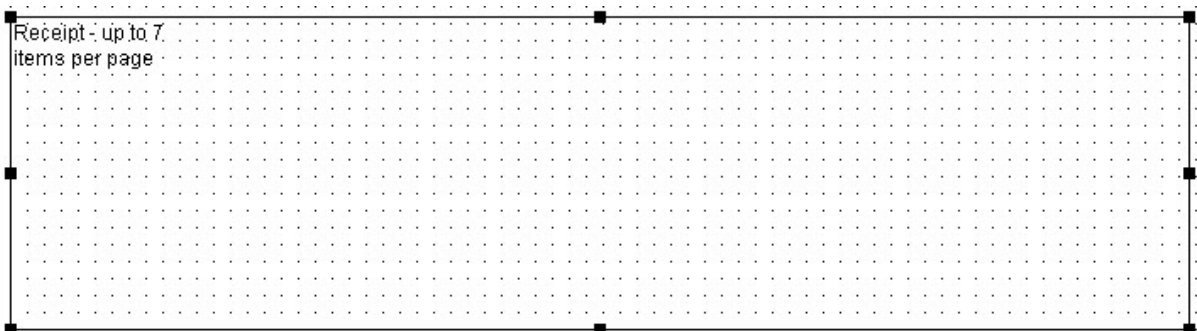


Figure 253: The 'financial object' in the document



Figure 220: The properties of the financial object

The most important of these properties is the 'Format details' area. Click the down arrow at the end of the 'Format details' line and the following dialogue appears (Figure 221).

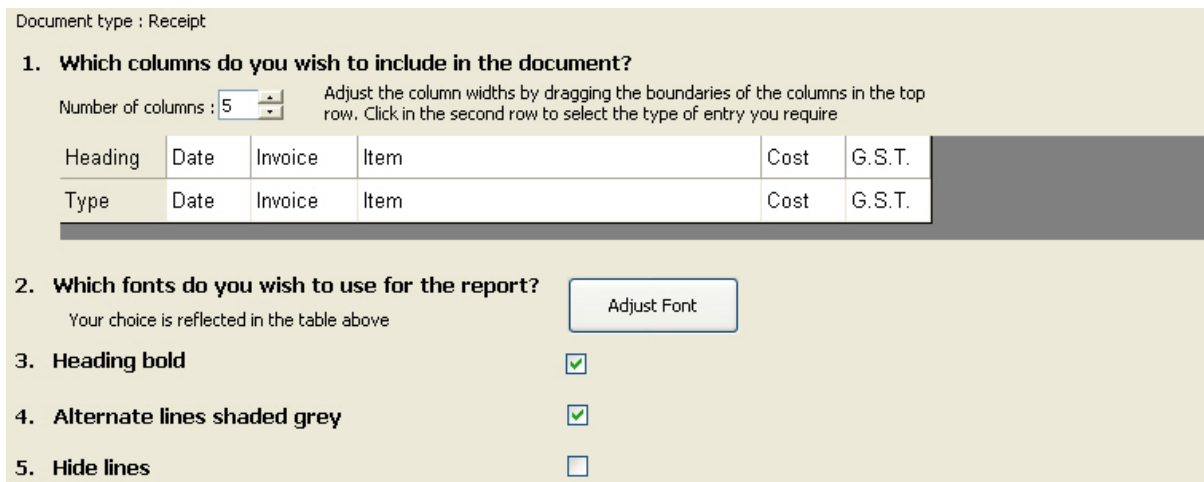


Figure 221: The format screen for the financial object

Receipts have five columns, although this can be reduced if required. By default, the headings are as shown, and their 'Type' matches the headings. By clicking on type there is a drop down menu that can be used to change the data the column picks up (Figure 222). The Headings are editable also.



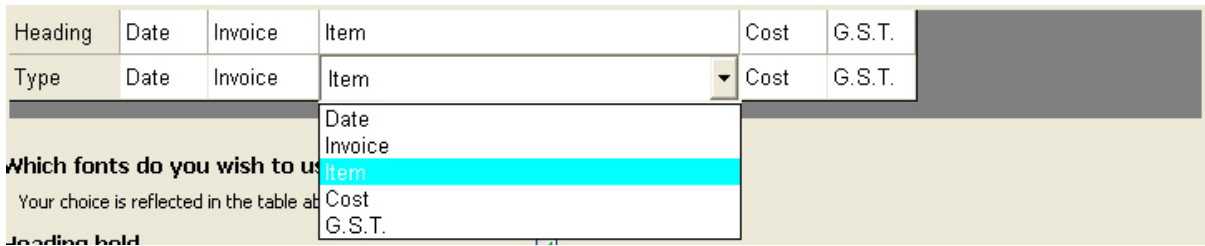


Figure 222: Selection of the column contents

Users have control over the font properties used also. Click 'Adjust Font' and the following screen will appear (Figure 223).

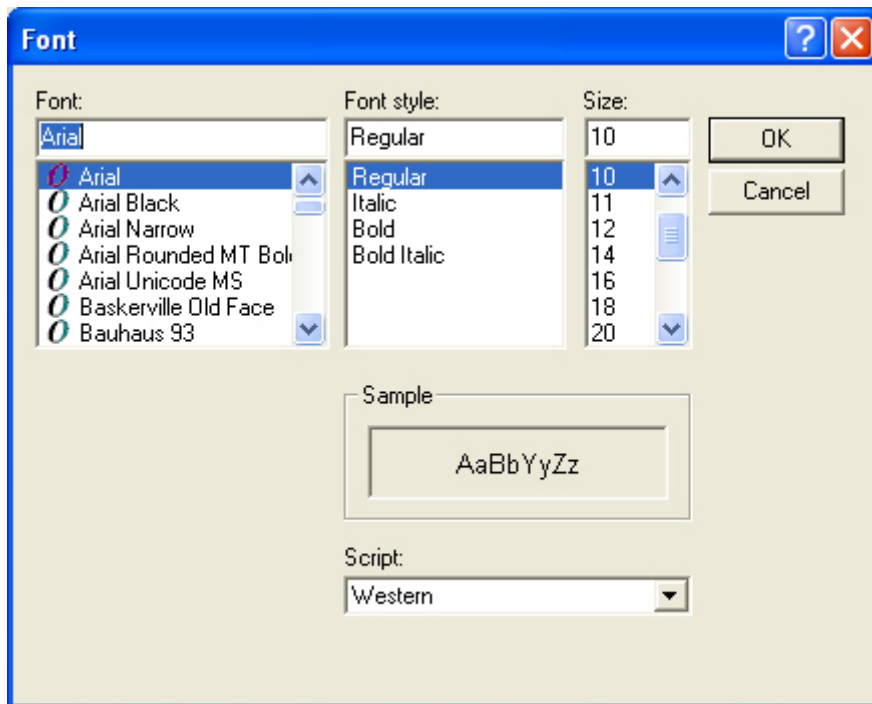


Figure 223: Selection of the font

Beneath the 'Receipt' area is another box, this is a word processor box, with the code 'Total amount received: {cm.fin(12)}' in it. If you select the area, then right-click within the area and select 'Edit Object' the word processor itself will pop up and the contents of the display can be edited (Figure 224).

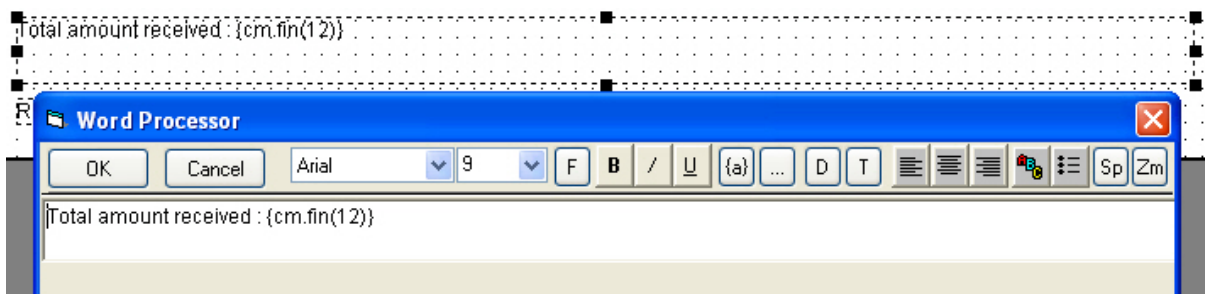


Figure 224: The use of the word processor

The words 'Total amount received' have been typed in by the user. The code {cm.fin(12)} is added by clicking the '{a}' in the tool bar. The RTF code selection box will appear (Figure 225). This will give you multiple tabs to choose from to add information. To add the financial information click the 'Financial' tab/Amount in words. This will take the user back to the RTF box where the code will now sit. Once the receipt is printed the information for that column will be printed, in this case the amount of the transaction in words. Other tabs that maybe of use during document design are, 'Specials', for date fields and 'Caregivers', for adding address fields.

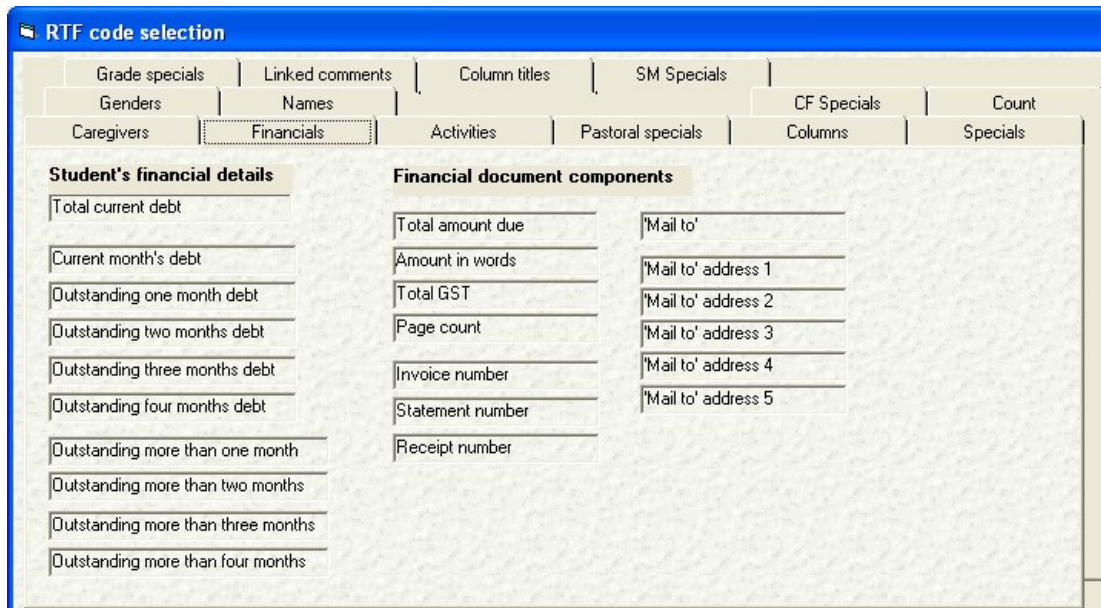


Figure 225: Selection of a financial code for insertion

The small box in the top right hand corner of this document has a receipt number field and G.S.T number (Figure 226). Again the receipt number is added by Editing the details and adding it through the '{a}'. The G.S.T number is a default number and will need to be edited by the school to add their own.

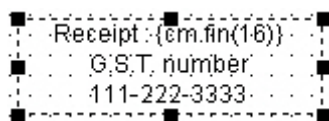


Figure 254: The GST number

By selecting all of the text in the word processor and then clicking 'Align centre' the text will be centrally aligned.

Click 'Save document', follow the saving procedure, and then click 'Exit document', to return to the 'Financial document design' area.

Financial documents are not stored in the same area as other Student Manager documents. Instead they are stored in a separate subdirectory under a subdirectory titled 'Financial documents'. An extract from Windows Explorer is shown below (Figure 227).

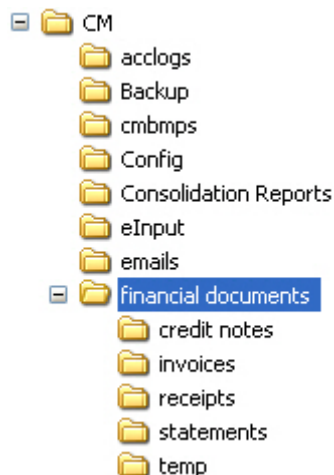


Figure 227: The financial document subdirectories

### *IIF Statements used for Balances on Invoice/Statements*

When setting up the Invoice/Statement document, use the script below to calculate the current amount owed. The only spaces typed in occur before and after 'due:'.

```
{cm.IIF({cm.Fin(10)}>0,"Amount due: {cm.fin(10)}",",")}
```

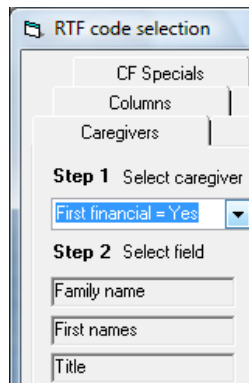
For example at the foot of the statement:

Please pay the amount due: {cm.IIF({cm.Fin(10)}>0,"Amount due: {cm.fin(10)}",",")}

### *Setup for 'Emailing Statement Caregivers'*

On the student's page – click on "Mailing Details" – you MUST ensure the flags are set to "No" for "Send invoices to 'Mail to whom'".

- 1 Set up one statement with the Caregiver address.

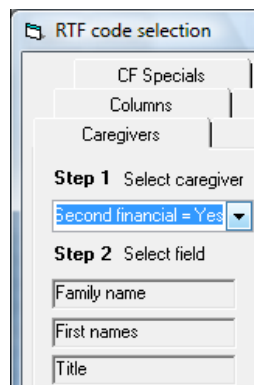


The screenshot shows a dialog box titled "RTF code selection". It has several tabs: "CF Specials", "Columns", and "Caregivers". Under "Step 1 Select caregiver", there is a dropdown menu currently showing "First financial = Yes". An arrow points to this dropdown menu. Below this, under "Step 2 Select field", there are three text input fields labeled "Family name", "First names", and "Title".

"First Financial = Yes". This will go to the first caregiver who has the tick against "Invoices".

- 2 Set up a second statement with the Caregiver address.

"Second Financial = Yes". This will go to the second caregiver who has the tick against "Invoices".



The screenshot shows the same "RTF code selection" dialog box. In this instance, the dropdown menu under "Step 1 Select caregiver" is set to "Second financial = Yes". The "Step 2 Select field" section with its three input fields remains visible below.

Ensure the correct email address is entered on the Caregivers' page.

The statements are saved to file as a PDF and stored in drive

/cm/financial documents/statements/ PDF – from here they are named with the 'statement name and date'. Inside this folder the PDF files are named with the student ID, date and time.

For instructions on how to email statements, see Step 4 Final decisions to email statement in the financial document design area, following Step 1: Selection of statement and default settings (Figure 191).

### 18.11 Printing 'Not issued' credit notes

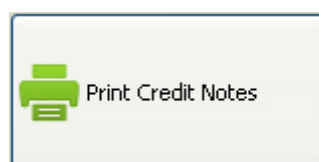


Figure 228: Print Credit Notes Button

As refunds are made the option of either printing or not printing a credit note is given. If electing to not print credit notes at the time of processing payments then users can visit this area to print

those not issued credit notes (Figure 228). They will not yet have been allocated credit note numbers. This can only happen at the time of printing.

The main screen is illustrated below (Figure 229). There are two options, 1. print all unprinted credit notes or 2. print selected credit notes.

In the first option the list of names will be removed. The next step will be to select the design of the credit note then click 'Proceed'. In the second option those students with credit notes will be listed and the user can select from this list those that need to be printed, select the design and then 'Proceed'.

**Step 1** Select :

Issue Numbers to ALL 'Not issued' credit notes. (This routine updates the database and allocates numbers to Credit Note transactions.)

updates the database and allocates numbers to Credit Note transactions.)

Print/Reprint selected

Numbered Credit Notes created between

17/11/2008

and

17/11/2008

Re-load List

**Step 2** Select

Student	Date	Amount
ALI, AHMED	17/11/2008	33.00

Select All

Select the Credit Note transactions you wish to print, select the Credit Note format and then click 'PROCEED' to print the Credit Notes.

**Step 3** Select

Credit note 1.dmt  
Newcreditnote.dmt

If you select a credit note design which involves more than one credit note per page and particular credit notes have more items than will fit on the design then these credit notes will be left unprinted for you to select a larger credit note design.

Proceed

Figure 229: The screen for printing 'not issued' Credit notes

## 19 The Printing Utility

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### 19.1 An overview of printing in Student Manager

The word processor utility allows single-page letters or quick and easy label printing. Similar functionality is available in SM documents, which can be extremely sophisticated. The use of a document to design a 'letter home' is described earlier. ???

The main method of generating lists is the first topic – user-defined lists. Fast lists are really, user-defined lists too and, if you design a fast list and record its design, it will subsequently be available under user-defined lists. The fast lists process can be regarded as a wizard for the design of simple user-defined lists.

There are various options relating to the overall process. These are included under the heading of 'Settings', and there is also a high level filter which enables you to design and record further personal filters for use in the printing process.

The printing utility is accessed from the main menu. Click 'Printing'.

The main screen for the utility has a series of buttons, each of which accesses one of the main printing areas.

The first five buttons access the main printing areas. These are followed by the **Settings** button and the **Filter** button.

At the bottom of the screen are two filter pop-ups.

The first lists any personal filters which have been designed (via the **Filter** button).

The second offers the main filters from the main Student Manager menu.



Figure 1: The main printing screen

## 19.2 User Defined Lists

User defined lists are tabular lists that select a range of fields from the database. There is a high degree of control over page and list headers and footers, the format of the grid itself and its contents.

### Getting Started

Click **User-defined** and the file dialog screen, offering any previously designed lists which have been created will appear. Initially, this screen (shown below) will be empty.

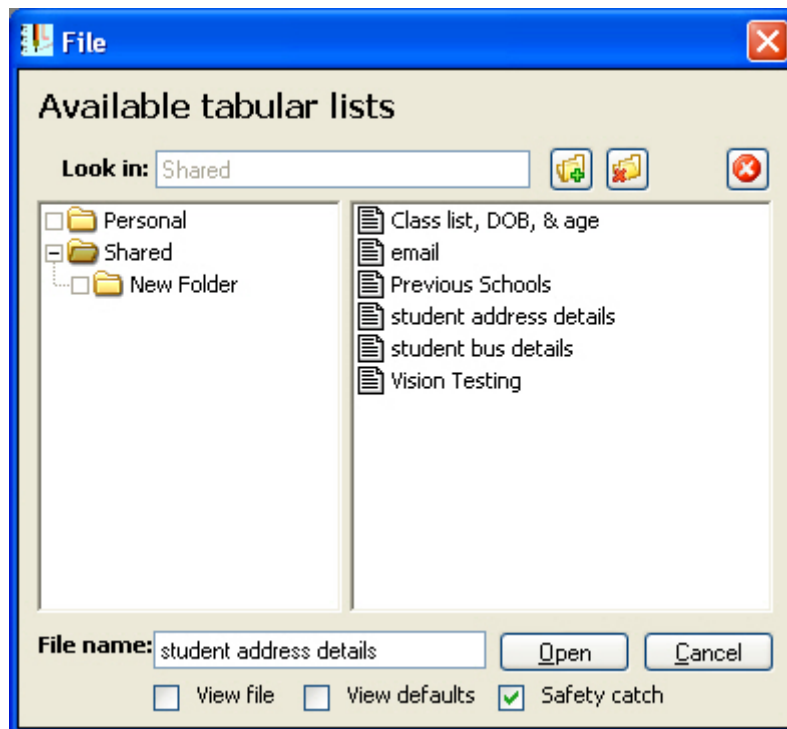


Figure 2: Selecting a previously designed list

Enabling the file dialog to open automatically on first entry to the user-defined lists is optional and can be changed in the **Settings** area on the main printing screen.



If you have not selected a previously designed list then, you will be presented with a blank page, divided into five horizontal sections. These are the page header, list header, list body, list footer and page footer.

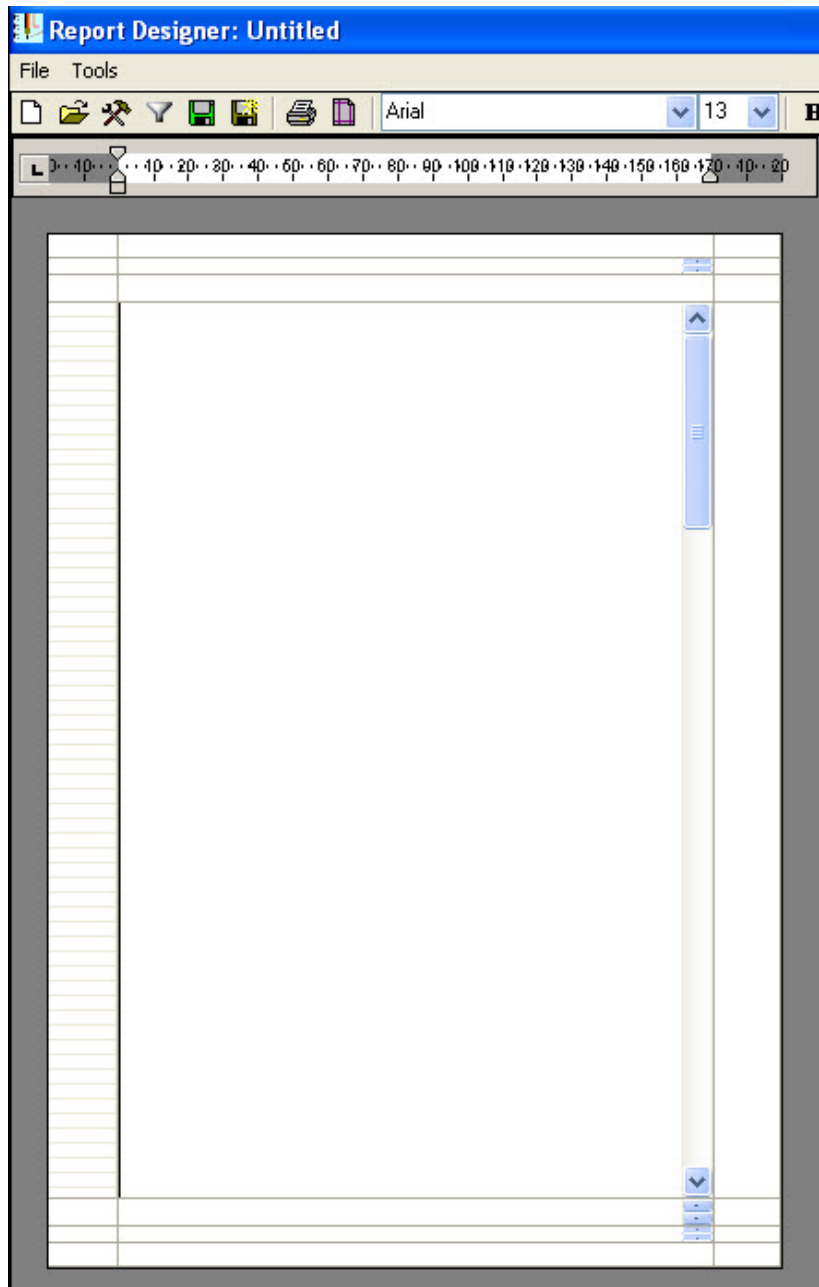


Figure 3: The blank page layout

The headers and footers are all rich-text entry areas, so the word processor controls in the menu area apply when entering text in these areas.

Along the top of the screen is a toolbar.

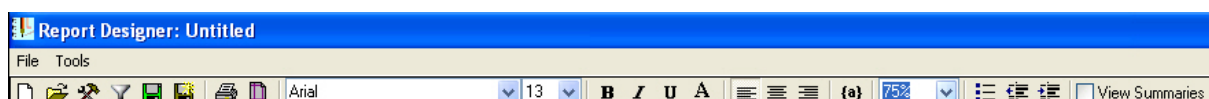


Figure 4: The top tool bar

The size of the display can be varied using the drop-down at the right hand end of the display. If your mouse has a scroll wheel then, once this has been selected, scrolling the wheel will also change the size of the display.

The buttons at the left hand end of the toolbar have the following functions.

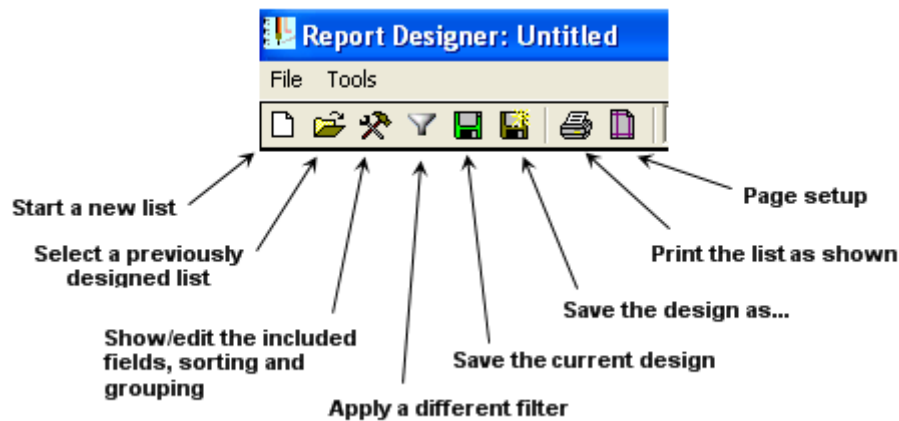


Figure 5: The toolbar buttons

### Adding Data Fields

- Click the utilities button  to open the utilities dialog box.

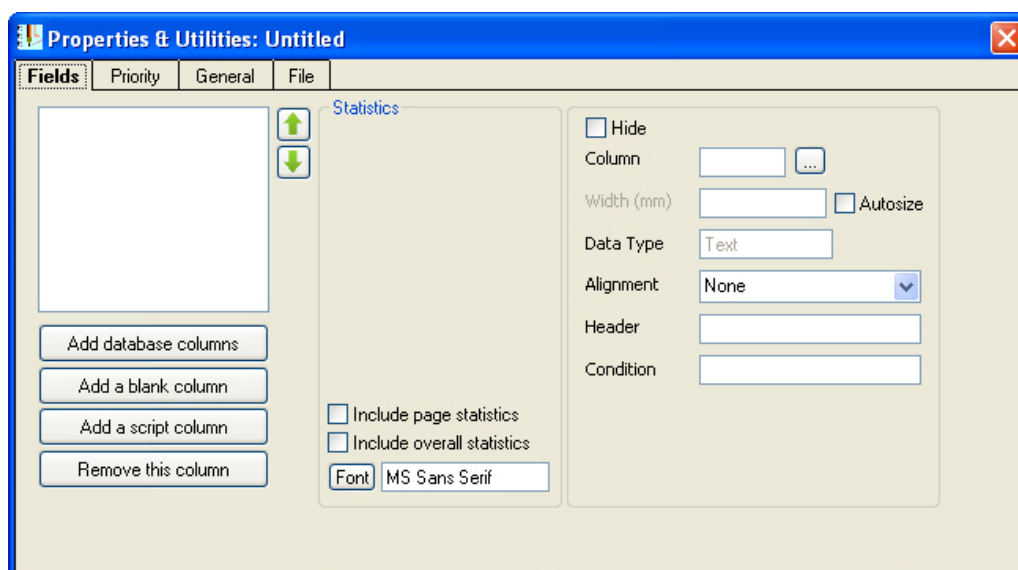


Figure 6: The utilities dialog box

- Click the **Add database columns** button to bring up the column picker.

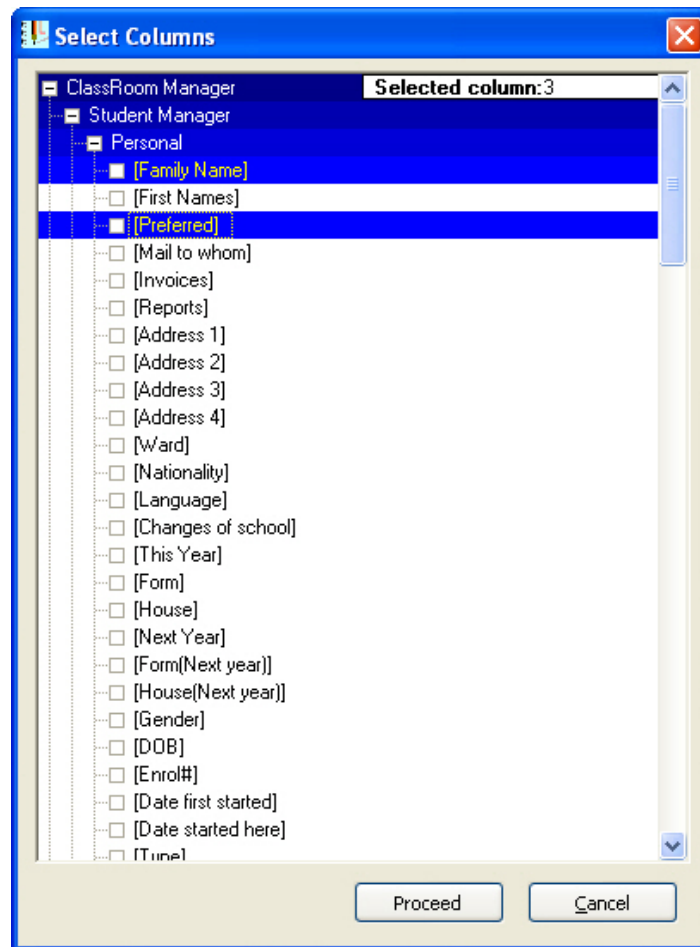


Figure 7: The column selection tool

- Use the tree view of the database columns to select the fields for the report.
- Click **Proceed** to add the selected columns to the report. There is a slight delay as the document dynamically updates in the background. This can be seen in the Figure below.

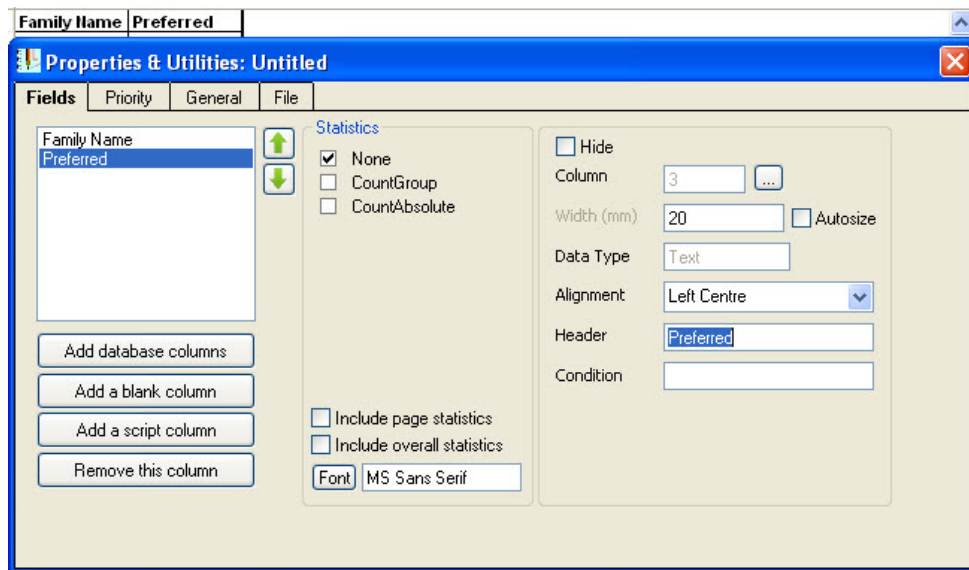


Figure 8: The selected columns

### Adding Script (Merge) Fields

Script or merge fields display a large range of fields, some directly obtained from the database and others calculated from information already held in the database.

Click **Insert a script column** and the RTF editor appears.

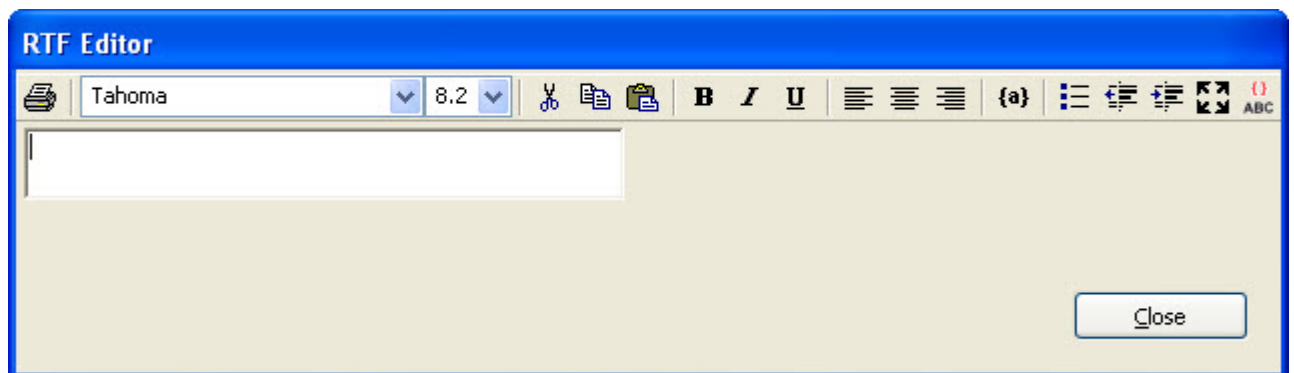


Figure 10: The RTF Editor

- Click **{a}** on the toolbar to open the RTF code selection tool.

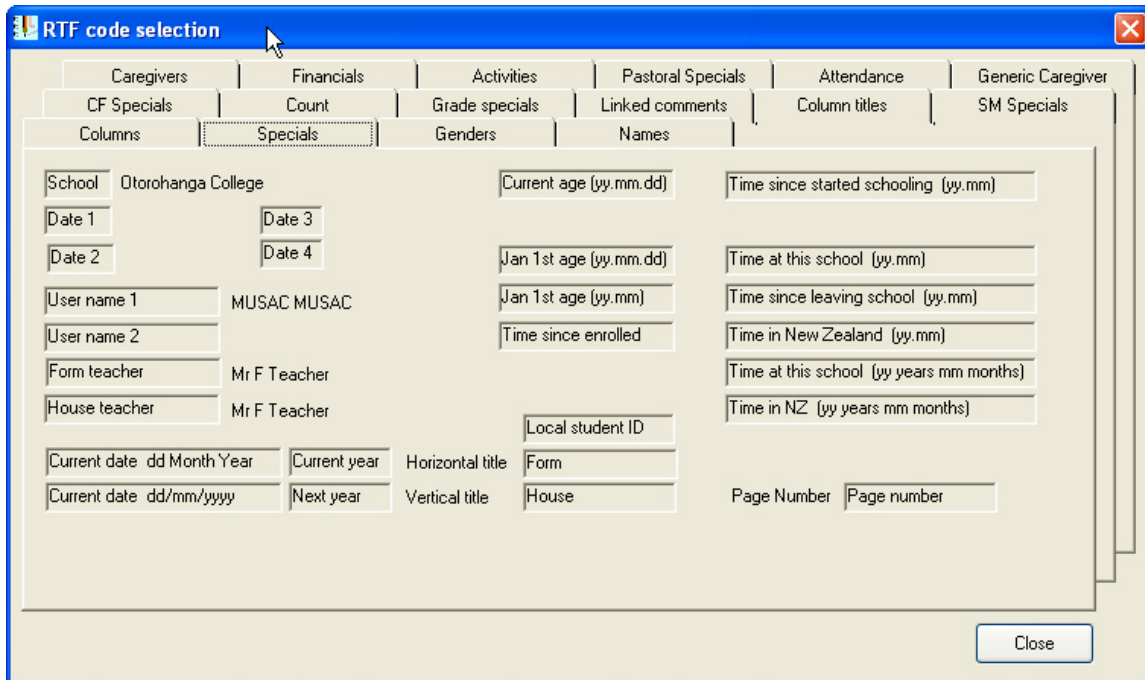


Figure 11: The RFT code (script) insertion tool

- Click **Time at this school** field under the **Specials** tab. The script **{cm.special(33)}** will appear in the RTF editor.
- Close the RTF editor and the calculated data will appear on the list.

Typing anything into the editor will display in the grid. There is also a calculated column 'weeks at school'.

The full header for this script is very long for the column heading so a more suitable description can be entered into the header text box.

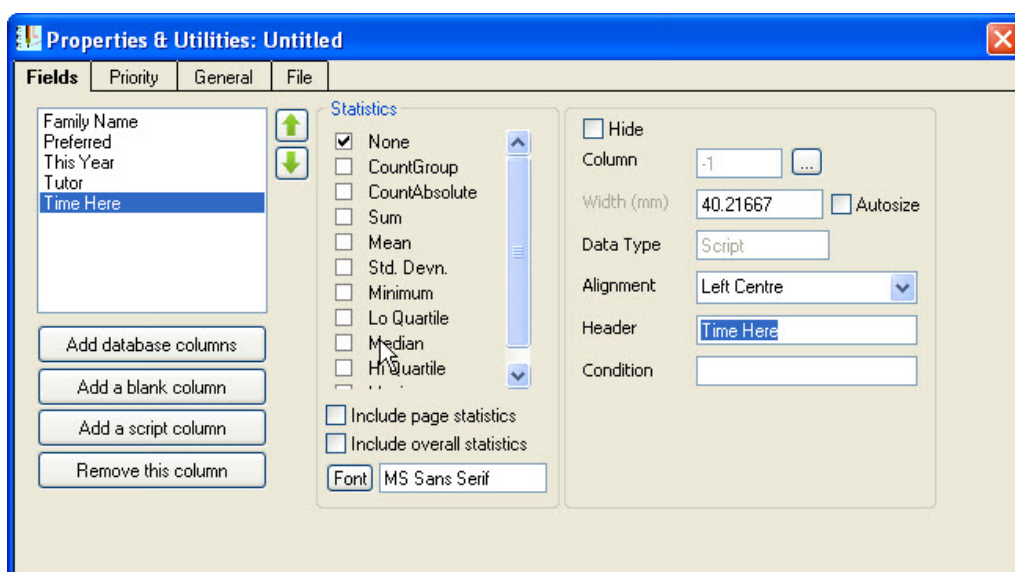


Figure 9: The properties of a Script column

The output will appear similar to the following. Note that double-clicking on a column resize cursor will auto-set the column width to display the longest item of text (names are deliberately obscured).

Family Name	Preferred	This Year	Tutor	Time here
...	...	13	RWRI	5 years 1 months
...	...	13	NDON	5 years 1 months
...	...	13	KEDS	5 years 1 months
...	...	13	NDON	5 years 1 months
...	...	13	NDON	5 years 1 months
...	...	13	NDON	5 years 1 months
...	...	13	KEDS	5 years 1 months
...	...	13	NDON	5 years 1 months
...	...	13	TATK	5 years 1 months
...	...	13	KMCF	4 years 10 months
...	...	12	NDON	4 years 1 months
...	...	12	TLEW	4 years 1 months
...	...	12	NGIB	4 years 1 months
...	...	12	RWRI	4 years 1 months
...	...	12	RWRI	4 years 1 months
...	...	12	RWRI	4 years 1 months
...	...	12	TATK	4 years 1 months
...	...	12	RLIS	4 years 1 months
...	...	12	NGIB	4 years 1 months

Figure 10: Example of a script result

Column Statistics

Summary statistics can be displayed on any column. In most cases you will only be able to display the number of items in the list, but in the case of columns containing numeric data you will be able to display the mean, median, quartiles etc.

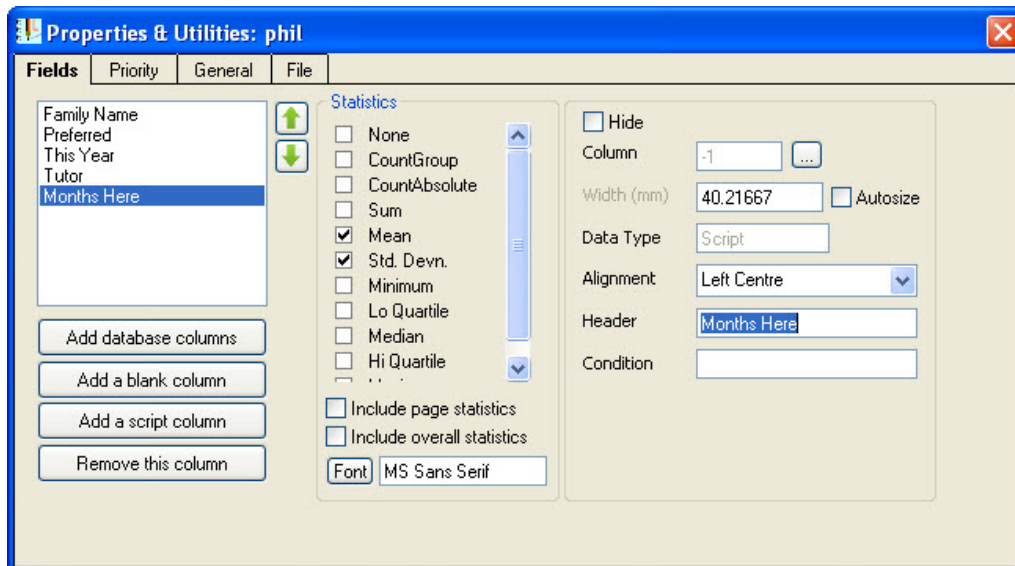


Figure 11: Showing column statistics

When printed, the values are displayed as shown below:

**Time (in months) at this school  
Tutor KDUF**

Family Name	Preferred	This Year	Tutor	Months here
BAKER	Female	11	KDUF	38
BALDWIN	Female	11	KDUF	38
BALLET	Female	12	KDUF	13
BALWANT	Female	11	KDUF	38
BALWANT	Female	13	KDUF	41
BALWANT	Female	11	KDUF	38
BALWANT	Female	11	KDUF	25
BALWANT	Female	13	KDUF	38
BALWANT	Female	11	KDUF	38
BALWANT	Female	13	KDUF	13
BALWANT	Female	11	KDUF	38
BALWANT	Female	11	KDUF	30
BALWANT	Female	11	KDUF	38
BALWANT	Female	11	KDUF	38
BALWANT	Female	11	KDUF	12
BALWANT	Female	11	KDUF	38
BALWANT	Female	11	KDUF	38
BALWANT	Female	12	KDUF	12

Group = 18    Mean = 31.33  
Std.Devn. = 10.97

Figure 12: Column Statistics in a report

Other settings:

- The order of the fields in the grid can be changed by clicking the arrow buttons.
- Click the **Hide** checkbox if you do not want the field to be displayed (sometimes a field is needed only for sorting or grouping but not for display).
- The **Column** button is included simply to allow you to select a different column or to edit a script column.
- Tick the **Autosize** tickbox to resize column widths to the longest item of text. If this box is un-ticked manually enter a column width (in millimetres).
- **Alignment** may be set to an appropriate value.
- The column **Header** by default is the same as the column name from the database. You may edit the page header, but ensure to add room under the last row of data to ensure the header displays correctly.
- A **Condition** can be applied as an additional filter on the rows to be included. The condition responds to most normal comparison operators (=, <, >, <=, >=) as well as the wildcard characters '\*', '?' and '#'.

*Setting Field Priority*

In this context, 'priority' refers to the order of importance of the fields in the list.

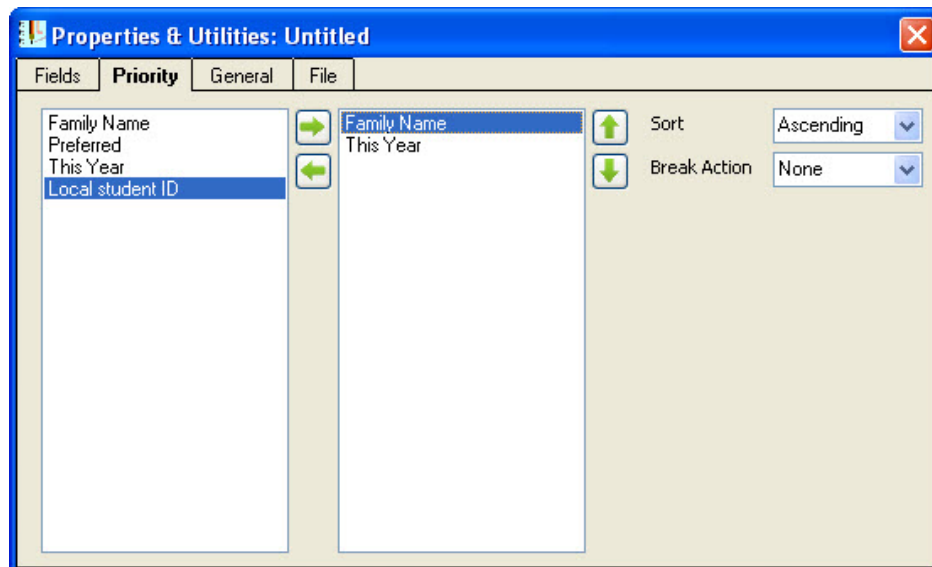


Figure 13: Setting priorities in the selected columns

- Click the **Priority** tab to perform column sorting, grouping and formatting.
- Select, in turn, your priority columns in the left-hand panel and click the right-arrow to include it in the right-hand panel. Use the up/down arrows to move selected columns to higher or lower priority in the right-hand panel.
- Use the **Sort** drop-down box to obtain the required sorting of data in the grid. Again the data updates in the background.
- The **Break Action** drop-down box is selected to break the data into sections or pages.

### Formatting the Report

Click the **General** tab to set any special formatting for the grid.

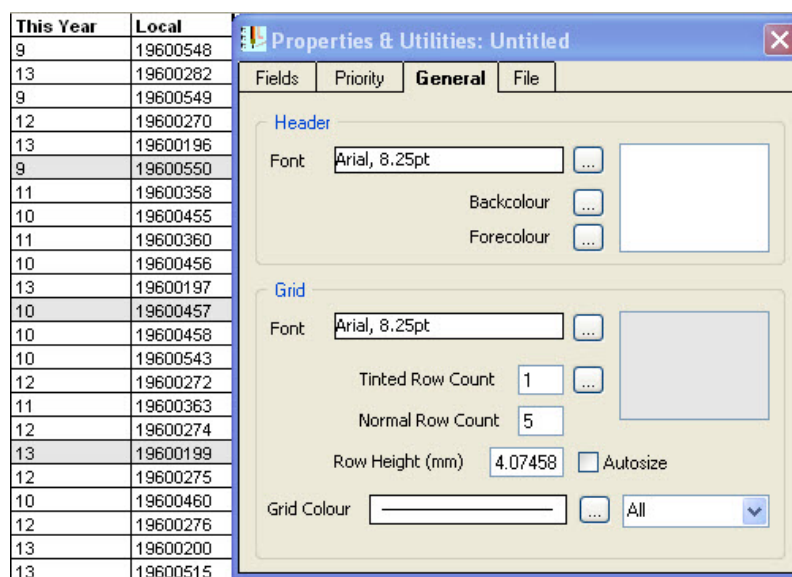



Figure 14: Formatting the list appearance

Here is where any special fonts and colours are set.



- The **Tinted rows** refers to the ability to have rows of a different colour to help with visually tracking data.
- Ticking the **Autosize** tick-box will automatically expand the rows which contain long text vertically. If this check-box is un-ticked a manual value can be entered.

### Printing

Click the **Print** button  to send the list to the print preview window.

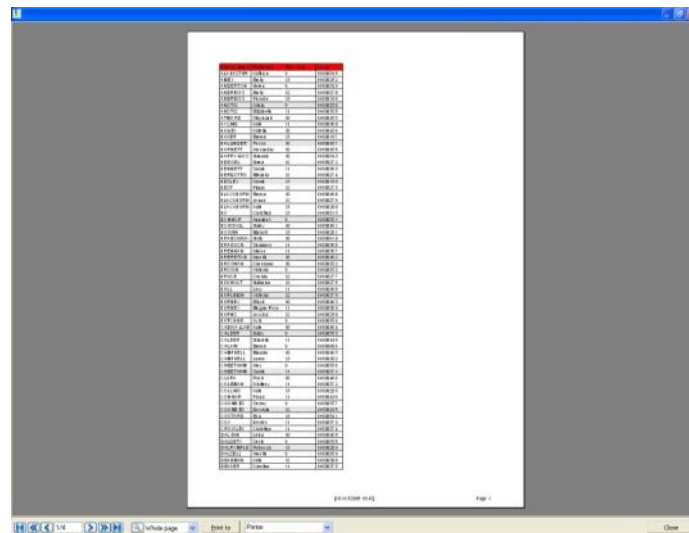


Figure 15: The list is ready for printing

Here the whole document or selected page can be printed to a printer or a file. Supported file formats are comma delimited (CSV), tab delimited (TSV), portable document format (PDF), rich text (RTF) and hyper-text (HTML).

Select the required format from the combo box and click the **Print to** button. Printing to a file will give a dialog box prompting for a filename and destination. Use this option to obtain export files for other applications (e.g. MS Excel).



Figure 169: The printer pop-up

### Headers and Footers

The page header is a rich-text entry area. Use the basic rich-text settings in the menu bar to format the text.

Margins and grid row heights can be set by click-and-drag using the resize cursors.

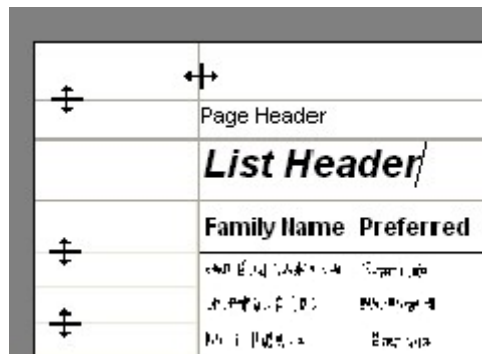



Figure 17: Adjusting the margins

When you edit the page header you need to create more room under the last row by mousing-over until a single line  with top and bottom arrows appear, and drag the line down to ensure the document header displays in entirety on the preview screen.

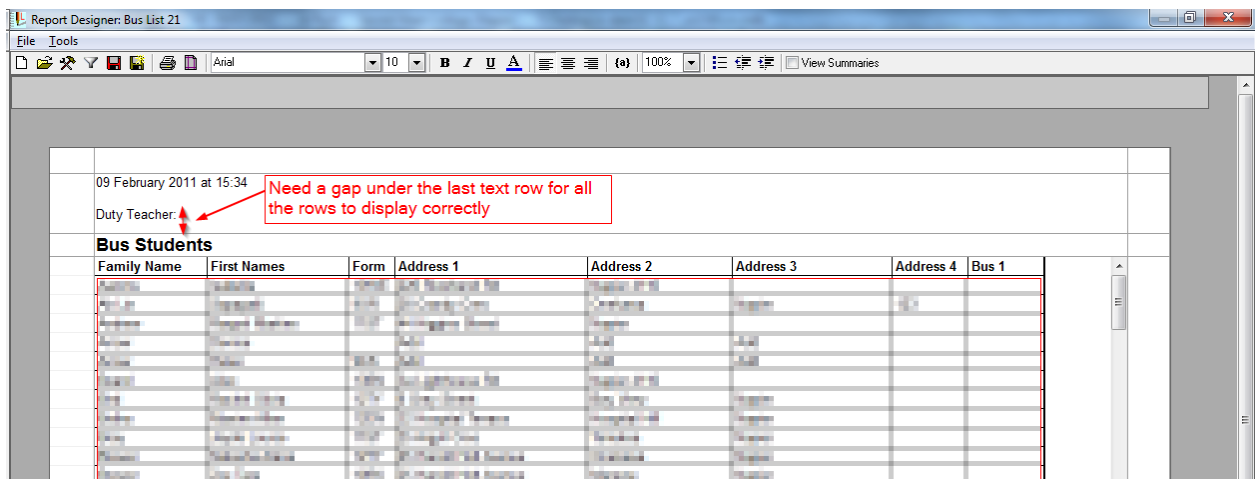


Figure 18a: Header display

### Summary Totals

Sometimes you may just want to obtain the total number of students in certain groups.

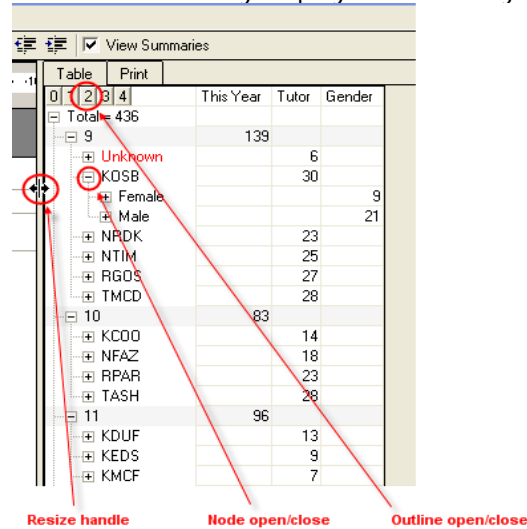
- Create the list
- Set the sorting and grouping for the columns

For example, to find the number of students in each year and vertical form group, with genders separate, create a list with the following columns in this order:

- This Year (column 16)
- Tutor (column 18)
- Gender (column 23)
- Name (script column)

Each column should be sorted ascending.

- Click the **View Summaries** check-box.
- Drag the summary resize cursor to fully display the summary totals.



	This Year	Tutor	Gender
Total	436		
9	139		
Unknown		6	
KOSB		30	
Female			9
Male			21
NRDK		23	
NTIM		25	
RGOS		27	
TMCD		28	
10	83		
KCDD		14	
NFAZ		18	
RPAR		23	
TASH		28	
11	96		
KDUF		13	
KEDS		9	
KMCF		7	

Figure 191: Example summary data

In this example there are 139 year 9 students, 6 with an unknown Tutor group (some data needs to be fixed). There are 30 year 9 students in KOSB Tutor group; 9 females and 21 males.

### 19.3 Word Processor

The word processor allows you to create a single-page free-text report with merge fields from the database. It also allows you to generate labels quickly and easily.

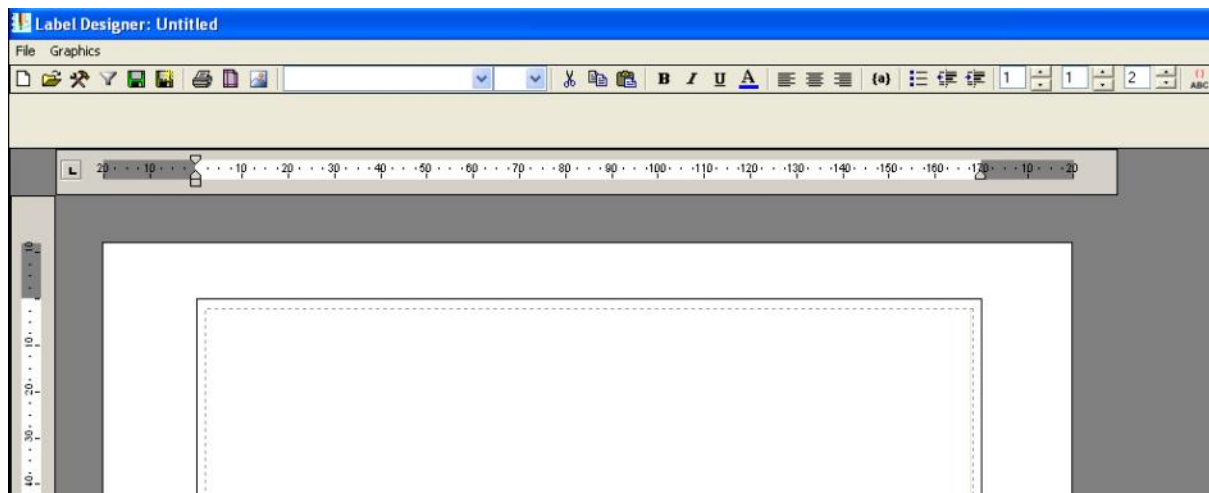


Figure 202: The blank word processor page

Along the top of the screen is the toolbar.

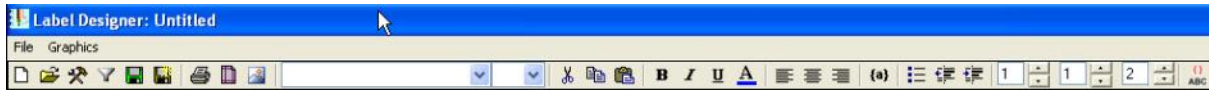


Figure 213: The word processor toolbar

The buttons at the left hand end of the toolbar have the following functions.

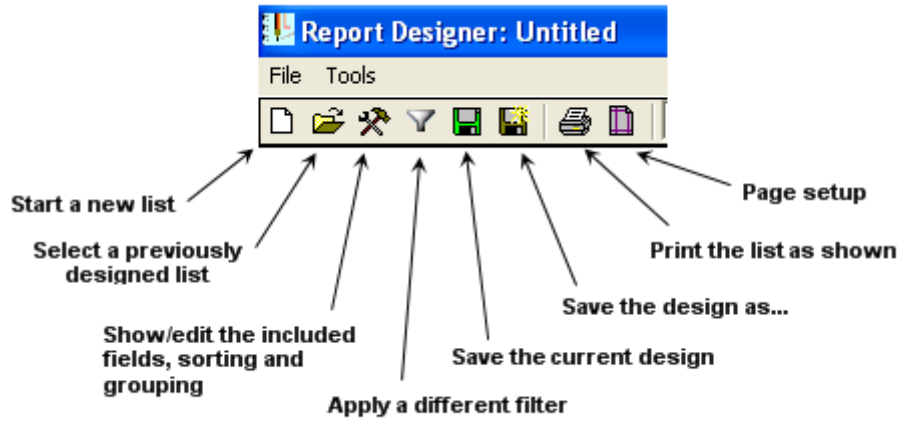


Figure 223: The utility toolbar buttons

The other buttons relate to text and layout.

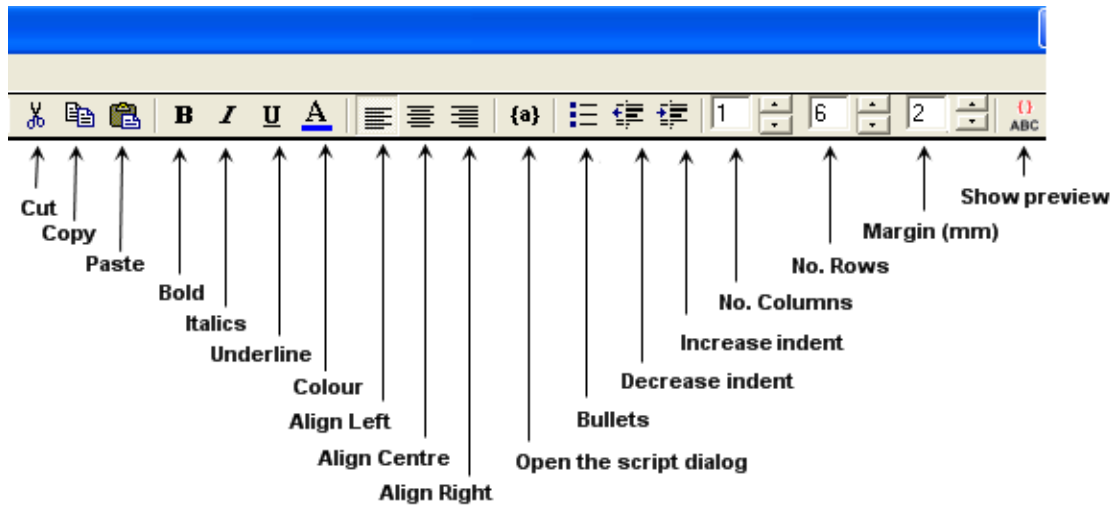


Figure 234: The text and layout toolbar buttons

### Adding Text

When creating a label, the cell in the top left of the page is the canvas for creating the content of the labels. How the labels will appear when printed by can be seen when clicking on the **Show preview** button.

Commonly accepted word processor methods can format the label (indent, tab, cut, paste etc.)

Margins and indent margins can be adjusted by click-and-drag on the rulers. Pressing and holding the Alt key will display the margin size in millimetres while the key is held down.

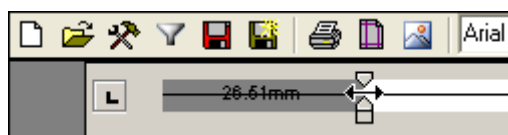


Figure 25: Changing the margins (Alt key held down)

Here is an example of a typical label. The left-hand panel is the label design area and the right-hand panel is the preview.

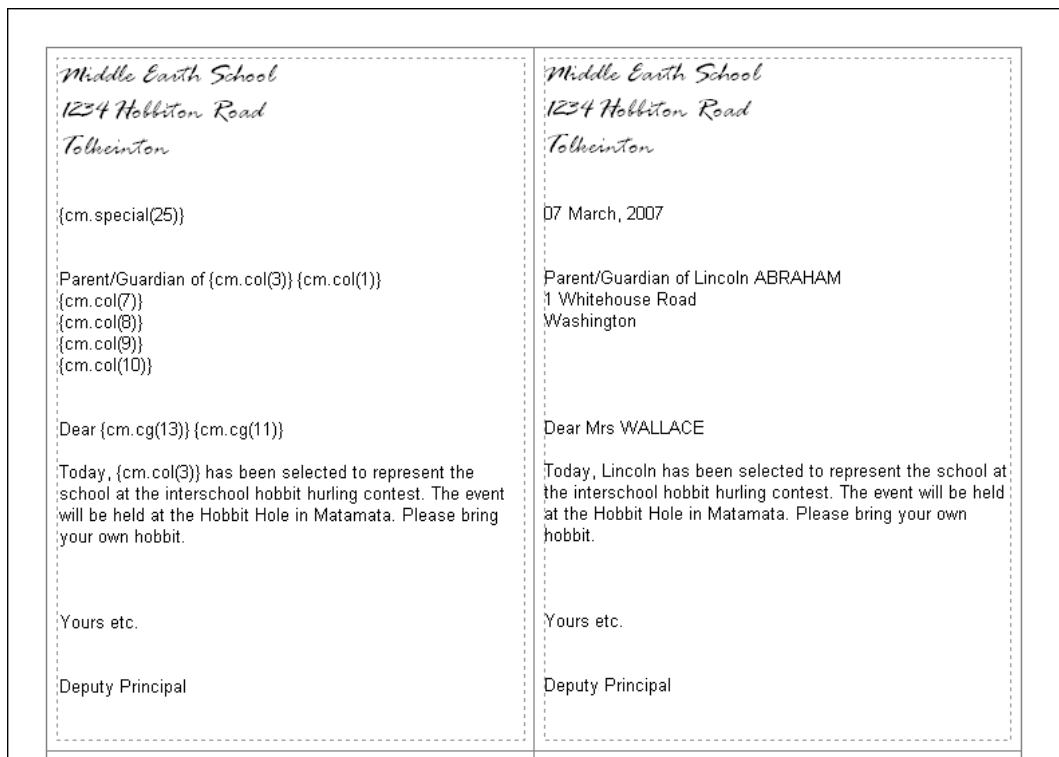


Figure 246: Typical word processor layout

### Adding Data Display Fields

- Click **utilities** to open the RTF code insertion tool dialogue box.

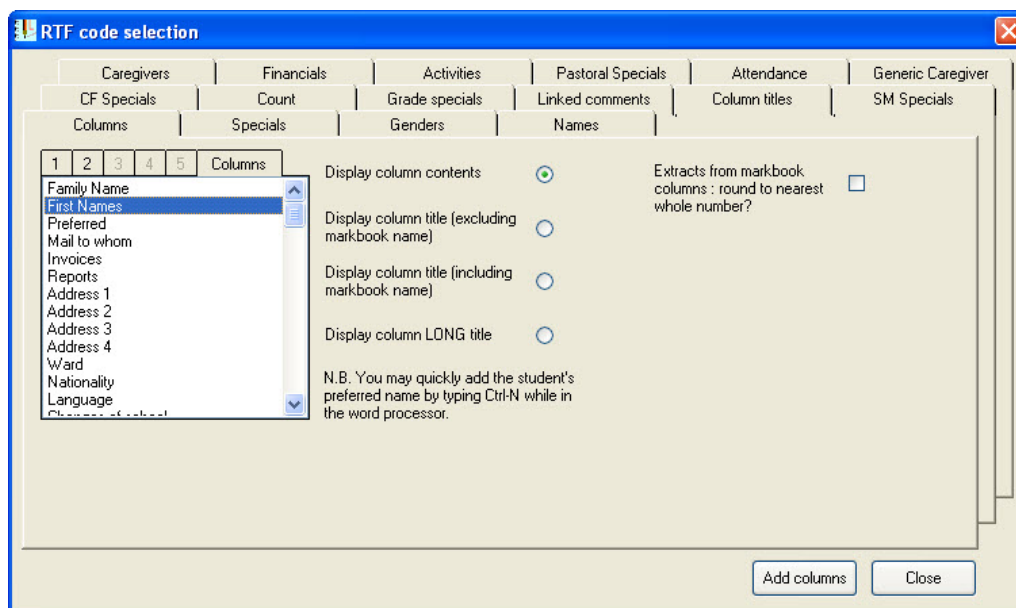


Figure 27: The code (script) insertion tool

- Clicking on an item will insert the appropriate script into the word processor.

### Printing

- Click **print** to send your list to the print preview dialog. To ensure the header is fully displayed, you may need to drag the row line beneath the last data.

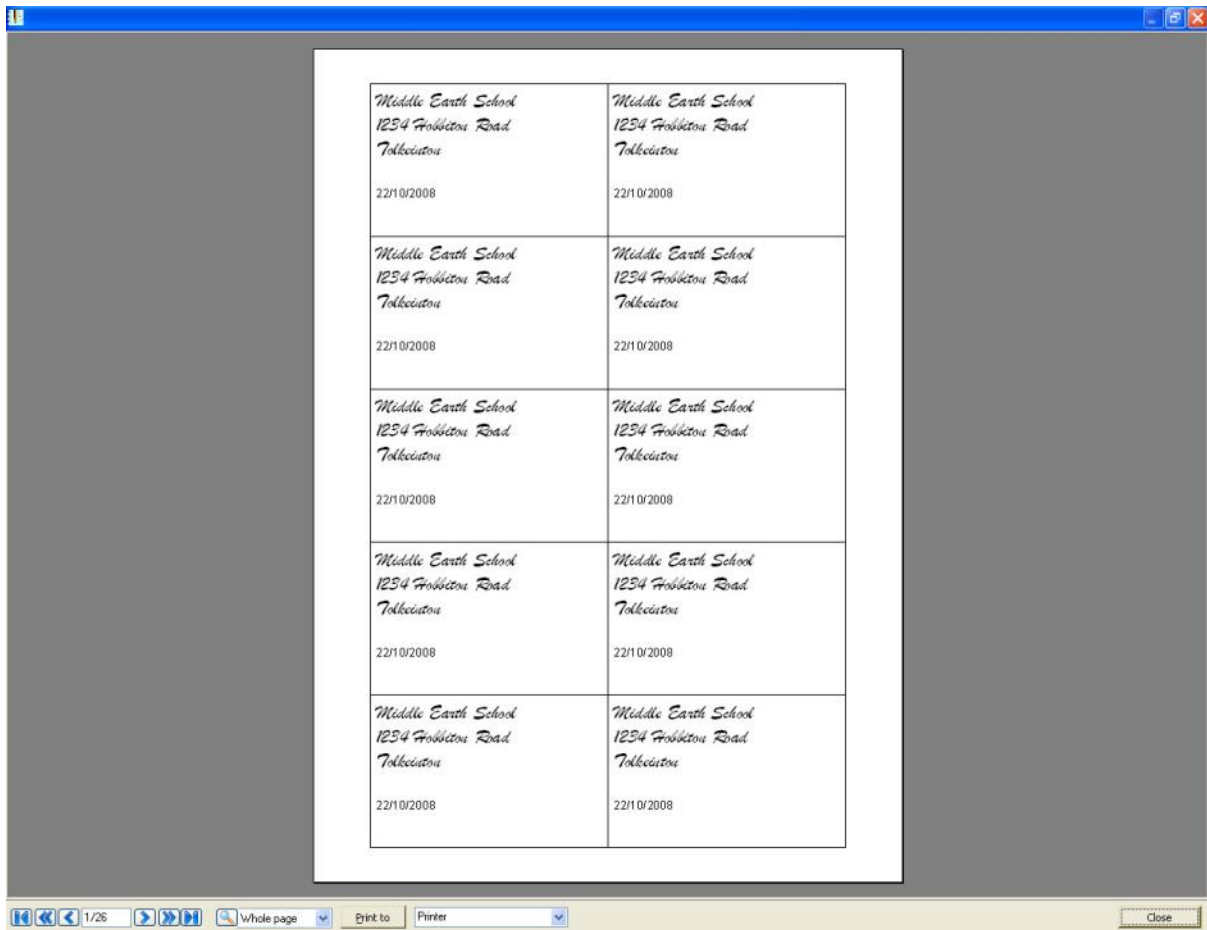


Figure 28: The print preview dialog

### Caregiver Mode

There is a radio-button that switches the application to **Caregiver Mode**. In caregiver mode the system loads multiple copies of each student in the filter up to the number of caregivers that they have associated with them. Each copy of the student is tagged with the associated caregiver ID.

Additionally, scripts have been added to the multi-picker to enable generic caregiver details to be added to lists and mail-merge documents. During the generation of previews, these scripts respond to the caregiver ID tagged to each student.

Selecting caregiver mode disables **Fast Lists**, **Special Lists** and **Tables**.

When in **Caregiver Mode** the **User Defined** and **Word Processor** list screens will display the number of records, including caregivers and will indicate in red that **Caregiver Mode** is on.



Figure 29: SM Lists Main Menu

**Main filters: Full time and Part time students (509 records currently loaded for 253 students - caregiver mode is on)**  
**Conditions: (none) (509 records displayed)**

Figure 250: Effect of Caregiver Mode on filters

Note that the filter information displayed at the lower left of the screen shows that there are 509 records for 253 students, indicating that the majority of the students have 2 caregivers.



The new **Generic Caregiver** tab in the multi-picker tool allows access to a range of caregiver details.

The screenshot shows a window titled "RTF code selection" with a "Generic Caregiver" tab selected. The window is divided into two main sections:

- Caregiver Specific Details:** A grid of input fields for caregiver information:
 

Family name	Home_Phone	CG User Title 1	eMail_Address
First names	Work_Phone	CG User Title 2	ID
Title	Fax_Number	CG User Title 3	Caregiver Number
Password	Cell_Phone	CG User Title 4	
Postal_Zip_Code	Other_Phone	CG User Title 5	
Postal_Address_1	Physical_Address_1	CG User Title 6	
Postal_Address_2	Physical_Address_2	CG User Title 7	
Postal_Address_3	Physical_Address_3	CG User Title 8	
Postal_Address_4	Physical_Address_4	CG User Title 9	
Postal_Address_5	Physical_Address_5	CG User Title 10	
- Student - Caregiver Details:** A list of fields related to the student:
 

Relationship	User_flag_1
Invoices	User_flag_2
Reports	User_flag_3
Voting Rights	User_flag_4
Emergency Contact	User_flag_5
Living With	User_flag_6
Legal Guardian	User_flag_7
Access Rights	

At the bottom right, there is a "Close" button. Below the dialog, there are dropdown menus for "Count", "Reports", and "Y".

Figure 261: Selecting Generic Caregiver Details

The left-hand panel offers most of the data fields from the caregiver table in the database. The right-hand panel offers the caregiver data that relates to the specific student.

### The Script Parser

Scripts give incredible flexibility when creating documents and lists because they allow for database fields or special calculated fields to be merged into other text at the time of printing. There are heaps of scripts available through the multi-picker and it is worthwhile spending a little time exploring some of these.

The script parser (in SMLists only) has been adjusted to handle nested scripts. This may not mean much until you try a few experiments with it, but basically, the output from one script can now form part of an input for another. Here is an example:

```
{cm.IIF("{cm.col(22)}"="Female","her","him")}
```

In this example the cm.IIF function takes the output of the cm.col function as one of its parameters. There are a few things to note here.

- Cutting and pasting a formula from a different word processor (for example, cutting the above text from this document) won't necessarily work due to the embedded RTF that goes with it. Therefore it is best to type it directly into the SMLists text box. Cutting and pasting within the SMLists entry boxes is OK.
- Quite a few of the script functions require parameters to be text (strings). In this case you need to enclose the text in double-quotes (i.e. Shift-Quote). The example above shows this in action.
- All scripts are enclosed in curly brackets {}.

- After a script has been created using the multi-picker you can edit it in the text editor. For example, the pastoral list script {cm.pastorallist(2, 0, "01/01/2006,\tab<21>\tab<2>")} can be edited to change the start date to (say) January 1st 2007 by just over-typing 2006 with 2007.

The PastoralList script can return a number of fields of pastoral data in a list. Fields can be separated by **Tab** characters to assist with formatting the output into tidy columns. Tabs should be inserted by entering `\tab` where required. This is an RTF instruction which will insert a **Tab** character in the final output, as in the example below.

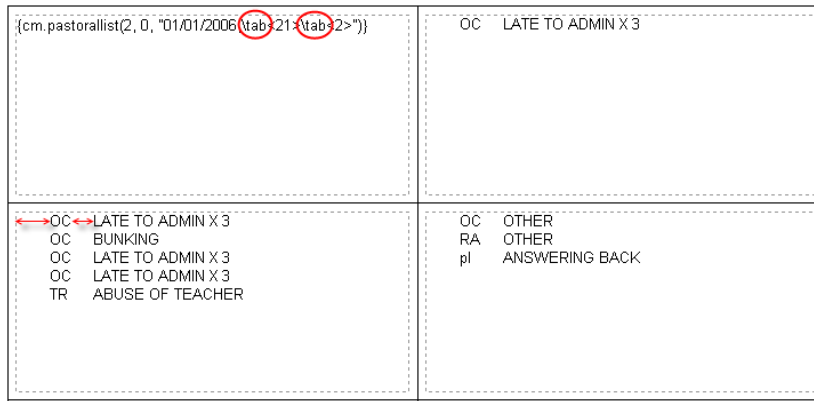


Figure 32: Using tabs to format pastoral lists

### Moving Between List Editors

Behaviour of the **Exit** button in User Defined and Word Processor lists now allows the document to stay 'live' if you exit to the SMLists main menu. This means you can work on a User Defined (tabular) list *and* a Word Processor (label) list *at the same time*, moving between them by clicking the **Exit** button to return to the main SMLists menu then the **User Defined** or **Word Processor** button to open or return to the other list editor.

The **Close** button at the top of the editor window will close *and unload* the editor, which means that the list will be blank when you next re-enter the editor.

In the event that the filter is changed (which includes changing the **Caregiver Mode**) there may be a slight delay as you re-enter an editor while it re-loads the filter data.

### For Advanced Users - Special Rich Text Command Scripts

The following is a description of some of the special scripts that you may find useful in Student Manager word processor documents. The improved RTF parser used in SMLists allows nested scripts to be evaluated. Please note that cutting and pasting a script from a MS Word document into the SMLists word processor may not work properly due to the way the RTF is rendered. For example, typing a speech mark at the keyboard enters the correct ascii character into the text but pasting a speech mark can sometimes write a special RTF instruction like `\ldblquote` which tells the RTF parser to render a left-hand double quote. If you're experiencing problems, and you're using cut and paste, try pasting into a text editor like Notepad, then cut and paste from Notepad into SMLists.

## Dates

There are a number of date functions which enable access to various components of dates and times. Most arguments of these function are expected to be text (known as string data). This has to be delimited by speech marks. Therefore, if the result of one of the cm functions is to be used in another function, it needs to be enclosed in speech marks. A variety of examples are given below:

{Now}	The current system date and time
{Date}	The current system date
{Day("3 Nov 2006")}	The numeric value of the day component of the supplied date
{Month("15 March 2007")}	The numeric value of the month component of the supplied date
{Year("{cm.col(23)}")}	The numeric value of the year component of the supplied date
{cm.col(23)}	The birth date of the current student in format dd/mm/yyyy
{FormatDateTime(Now,vbLongDate)}	The supplied date in the long date format specified in your computer regional settings. The second argument can be one of:

Constant	Value	Description
<b>vbGeneralDate</b>	0	Display a date and/or time. If there is a date part, display it as a short date. If there is a time part, display it as a long time. If present, both parts are displayed.
<b>vbLongDate</b>	1	Display a date using the long date format specified in your computer's regional settings.
<b>vbShortDate</b>	2	Display a date using the short date format specified in your computer's regional settings.
<b>vbLongTime</b>	3	Display a time using the time format specified in your computer's regional settings.
<b>vbShortTime</b>	4	Display a time using the 24-hour format (hh:mm).

{DateDiff("d","{cm.col(23)}",Now)} Difference between two supplied dates returned as multiples of the given interval. The first argument can be one of:

Setting	Description
yyyy	Year
q	Quarter
m	Month
y	Day of year
d	Day
w	Weekday
ww	Week
h	Hour
n	Minute
s	Second

{DateAdd("ww",3,Now)} Add the specified number of intervals to the supplied date  
 {DatePart("y","13/5/2007")} The specified component of the supplied date. The first argument can be one of the values listed above.

{MonthName(4)}	The name of the specified (numeric) month of the year
{WeekDayName(2,True,vbMonday)}	The name of the specified (numeric) day of the week. The second argument is either True to return an abbreviated form or False to give the long form of the name. The third argument specifies which day counts as the first day of the week.
{Hour(Now)}	The hour component of the specified date-time
{Minute(Now)}	The minute component of the specified date-time
{Second(Now)}	The second component of the specified date-time
{IsDate("8/10/2007")}	Returns True if the supplied argument is a date, False otherwise

### Other Scripts

{cm.IIF(<Logical Expression>, <Expression if True>, <Expression if False>)}

This function returns one of two results depending on the outcome of a logical comparison.

For example:

```
{cm.IIF({DateDiff("yyyy", "{cm.col(23)}", Now)} > 12, "Teenager", "Youngster")}
```

This example works out the age of the current student in years and returns "Teenager" if they're over twelve, else "Youngster"

```
{cm.col(3)} {cm.col(1)}
{cm.cg("B45")}{cm.IIF("{cm.cg("15")}"<>"",chr(11) & "add 1: {cm.cg("15")}"
,"")}{cm.IIF("{cm.cg("16")}"<>"",chr(11) & "add 2: {cm.cg("16")}"
,"")}{cm.IIF("{cm.cg("17")}"<>"",chr(11) & "add 3: {cm.cg("17")}"
,"")}{cm.IIF("{cm.cg("18")}"<>"",chr(11) & "add 4: {cm.cg("18")}"
,"")}{cm.IIF("{cm.cg("19")}"<>"",chr(11) & "add 5: {cm.cg("19")}"
,"")} Post code:
{cm.cg("110")}
```

### Printing Labels:

To remove blank address lines enter this script in edit, with no spaces for caregiver one. Student name followed by family name, addresses then followed by postal code. Ensure the city is the last address, although it doesn't matter which line.

{cm.Choose(<Numeric Expression >= 1,<Item1>,<Item2>,<Item3>,...)}

This function will select an item from a comma-separated list based on the value output by the numeric expression. For example:

{cm.Choose({cm.col(16)}-8,"Third","Fourth","Fifth","Sixth","Seventh")}

This will select the relevant text depending on the student's year level. If they are a year 11 student it will output Fifth (11 – 8 = 3, so it selects the 3<sup>rd</sup> item from the list).

{cm.Format(<Text Expression>,<Format String>)}

This function takes an expression and returns it in a format dependent on the rules in the supplied text string. For example:

{cm.Format("{Now}","dddd d mmm yyyy")}

This will return the current date formatted with the full name of the day, full name of the month and the year as 4 digits (Tuesday 3 July 2007). A full list of formats is given below:

### Date Formats

Character	Description
c	Display the date as dddd and display the time as tttt, in that order. Display only date information if there is no fractional part to the date serial number; display only time information if there is no integer portion.
d	Display the day as a number without a leading zero (1 – 31).
dd	Display the day as a number with a leading zero (01 – 31).
ddd	Display the day as an abbreviation (Sun – Sat).
dddd	Display the day as a full name (Sunday – Saturday).
w	Display the day of the week as a number (1 for Sunday through 7 for Saturday).
ww	Display the week of the year as a number (1 – 54).
m	Display the month as a number without a leading zero (1 – 12). If m immediately follows h or hh, the minute rather than the month is displayed.
mm	Display the month as a number with a leading zero (01 – 12). If m immediately follows h or hh, the minute rather than the month is displayed.
mmm	Display the month as an abbreviation (Jan – Dec).
mmmm	Display the month as a full month name (January – December).
q	Display the quarter of the year as a number (1 – 4).
y	Display the day of the year as a number (1 – 366).
yy	Display the year as a 2-digit number (00 – 99).
yyyy	Display the year as a 4-digit number (100 – 9999).
h	Display the hour as a number without leading zeros (0 – 23).

Hh	Display the hour as a number with leading zeros (00 – 23).
N	Display the minute as a number without leading zeros (0 – 59).
Nn	Display the minute as a number with leading zeros (00 – 59).
S	Display the second as a number without leading zeros (0 – 59).
Ss	Display the second as a number with leading zeros (00 – 59).
AM/PM	Use the 12-hour clock and display an uppercase AM with any hour before noon; display an uppercase PM with any hour between noon and 11:59 P.M.
am/pm	Use the 12-hour clock and display a lowercase AM with any hour before noon; display a lowercase PM with any hour between noon and 11:59 P.M.
A/P	Use the 12-hour clock and display an uppercase A with any hour before noon; display an uppercase P with any hour between noon and 11:59 P.M.
a/p	Use the 12-hour clock and display a lowercase A with any hour before noon; display a lowercase P with any hour between noon and 11:59 P.M.

### Numeric Formats

Character	Description
-----------	-------------

None	Display the number with no formatting.
------	--

(0)	<b>Digit placeholder.</b> Display a digit or a zero. If the expression has a digit in the position where the 0 appears in the format string, display it; otherwise, display a zero in that position.
-----	--

If the number has fewer digits than there are zeros (on either side of the decimal) in the format expression, display leading or trailing zeros. If the number has more digits to the right of the decimal separator than there are zeros to the right of the decimal separator in the format expression, round the number to as many decimal places as there are zeros. If the number has more digits to the left of the decimal separator than there are zeros to the left of the decimal separator in the format expression, display the extra digits without modification.

(#)	Digit placeholder. Display a digit or nothing. If the expression has a digit in the position where the # appears in the format string, display it; otherwise, display nothing in that position.
-----	---

This symbol works like the 0 digit placeholder, except that leading and trailing zeros aren't displayed if the number has the same or fewer digits than there are # characters on either side of the decimal separator in the format expression.

(.)	Decimal placeholder. In some locales, a comma is used as the decimal separator. The decimal placeholder determines how many digits are displayed to the left and right of the decimal separator. If the format
-----	--

expression contains only number signs to the left of this symbol, numbers smaller than 1 begin with a decimal separator. To display a leading zero displayed with fractional numbers, use 0 as the first digit placeholder to the left of the decimal separator. The actual character used as a decimal placeholder in the formatted output depends on the Number Format recognized by your system.

- (%) Percentage placeholder. The expression is multiplied by 100. The percent character (%) is inserted in the position where it appears in the format string.
- (,) Thousand separator. In some locales, a period is used as a thousand separator. The thousand separator separates thousands from hundreds within a number that has four or more places to the left of the decimal separator. Standard use of the thousand separator is specified if the format contains a thousand separator surrounded by digit placeholders (**0** or **#**). Two adjacent thousand separators or a thousand separator immediately to the left of the decimal separator (whether or not a decimal is specified) means "scale the number by dividing it by 1000, rounding as needed." For example, you can use the format string "**##0,,**" to represent 100 million as 100. Numbers smaller than 1 million are displayed as 0. Two adjacent thousand separators in any position other than immediately to the left of the decimal separator are treated simply as specifying the use of a thousand separator. The actual character used as the thousand separator in the formatted output depends on the Number Format recognized by your system.
- (:) Time separator. In some locales, other characters may be used to represent the time separator. The time separator separates hours, minutes, and seconds when time values are formatted. The actual character used as the time separator in formatted output is determined by your system settings.
- (**E- E+ e- e+**) Scientific format. If the format expression contains at least one digit placeholder (**0** or **#**) to the right of **E-**, **E+**, **e-**, or **e+**, the number is displayed in scientific format and **E** or **e** is inserted between the number and its exponent. The number of digit placeholders to the right determines the number of digits in the exponent. Use **E-** or **e-** to place a minus sign next to negative exponents. Use **E+** or **e+** to place a minus sign next to negative exponents and a plus sign next to positive exponents.
- + \$ ( ) Display a literal character. To display a character other than one of those listed, precede it with a backslash (\) or enclose it in double quotation marks (" ").
- (\ ) Display the next character in the format string. To display a character that has special meaning as a literal character, precede it with a backslash (\). The backslash itself isn't displayed. Using a backslash is the same as enclosing the next character in double quotation marks. To display a backslash, use two backslashes (\\).

Examples of characters that can't be displayed as literal characters are the date-formatting and time-formatting characters (a, c, d, h, m, n, p, q, s, t,

w, y, / and :), the numeric-formatting characters (#, 0, %, E, e, comma, and period), and the string-formatting characters (@, &, <, >, and !).

("ABC") Display the string inside the double quotation marks (" "). To include a string in **format** from within code, you must use **Chr(34)** to enclose the text (34 is the character code for a quotation mark ("")).

## Text Formats

Character	Description
-----------	-------------

@	Character placeholder. Display a character or a space. If the string has a character in the position where the at symbol (@) appears in the format string, display it; otherwise, display a space in that position. Placeholders are filled from right to left unless there is an exclamation point character (!) in the format string.
&	Character placeholder. Display a character or nothing. If the string has a character in the position where the ampersand (&) appears, display it; otherwise, display nothing. Placeholders are filled from right to left unless there is an exclamation point character (!) in the format string.
<	Force lowercase. Display all characters in lowercase format.
>	Force uppercase. Display all characters in uppercase format.
!	Force left to right fill of placeholders. The default is to fill placeholders from right to left.

## Strings

These functions relate to manipulation of strings (text).

{Left("{cm.col(1)}",3)}	The left-most 3 characters of the specified text
{Mid("{cm.col(1)}",2,3)}	3 characters taken from within the text, starting at the 2nd character.
{Right("{cm.col(1)}",3)}	The right-most 3 characters of the specified text
{Replace("{cm.col(1)}","ie","ei")}	The specified text where occurrences of the sequence "ie" is replaced with "ei"
{Len("{cm.col(1)}")}	The number of characters in the specified text
{Trim(" Extra spaces ")}	Trims off any extra spaces on both left and right



Setting Up Letters Home – pastoral example

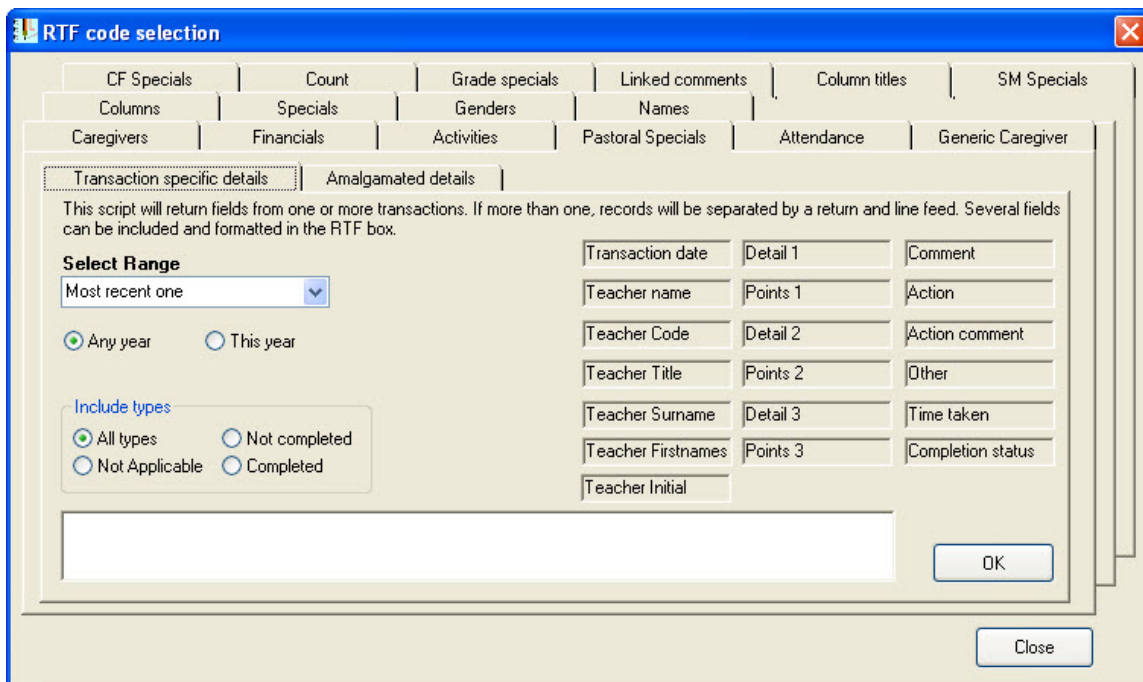


Figure 33: The pastoral script writer

There have been requests for the ability to display a different format in the teacher's name in pastoral lists. A **Pastoral List** script is now available to enable transaction details to be included in user-defined and word-processor documents. The script will return individual transactions fitting the following cases:

- Most recent single transaction (all years or just the current year)
- Most recent (specified number of) transactions (all years or just the current year)
- All transactions from a specified date
- All transactions between two specified dates

In each case the user can nominate if all transactions should be included or just those that are completed (or not completed or not applicable).

The script will return one or more fields from the table of pastoral transactions in a list delimited by carriage-return/line-feed. In the case where several fields are returned in one line you can space them out using the tab character (though when typing into the script insertion tool you'll need to type \tab to enter a tab character).

An example is shown below where six fields have been requested.

Teacher	Date	Status	Comment
ABRAHAM, Lincoln		TWAR	3
Teacher	Date	Status	Comment
16/03/2007	Not applicable	Flicking paper	
07/03/2007	Not completed	Pd 1 - wouldn't participate.	
23/02/2007	Not completed	Pd 2 - Lincoln was caught dropping litter	
16/02/2007	Completed	AVOL using cellphone	
11/10/2006	Not completed	Pd 5 - Lincoln refuses to settle and work. He is constantly chopping down cherry trees.	
26/08/2006	Not completed	Pd 4 - Lincoln is repeatedly hanging out of the window and disrupting the class.	

Figure 27: A pastoral script and the resulting output


The Figure below shows how the script interpreter will decode the message during printing.

Teacher	Date	Status	Comment
ABRAHAM, Lincoln		TWAR	3
Teacher	Date	Status	Comment
16/03/2007	Not applicable	Flicking paper	
07/03/2007	Not completed	Pd 1 - wouldn't participate.	
23/02/2007	Not completed	Pd 2 - Lincoln was caught dropping litter	
16/02/2007	Completed	AVOL using cellphone	
11/10/2006	Not completed	Pd 5 - Lincoln refuses to settle and work. He is constantly chopping down cherry trees.	
26/08/2006	Not completed	Pd 4 - Lincoln is repeatedly hanging out of the window and disrupting the class.	

Figure 28: The components of a pastoral script

### Adding a Graphic Object (Barcode, Photo, Logo)

Pictures may be added to the label e.g. the school logo, the student photo or a barcode.

- Click **graphic insertion** button . A graphic object will appear at the top-left of the display. Click-and-drag the object to your preferred location on the label. Resize it using the resize cursors that will appear when you mouse-over its edges. The object will be redrawn with blue edges when it has been selected (clicked).
- Right-click and select **Edit**. Select **Untitled Graphic 1**.

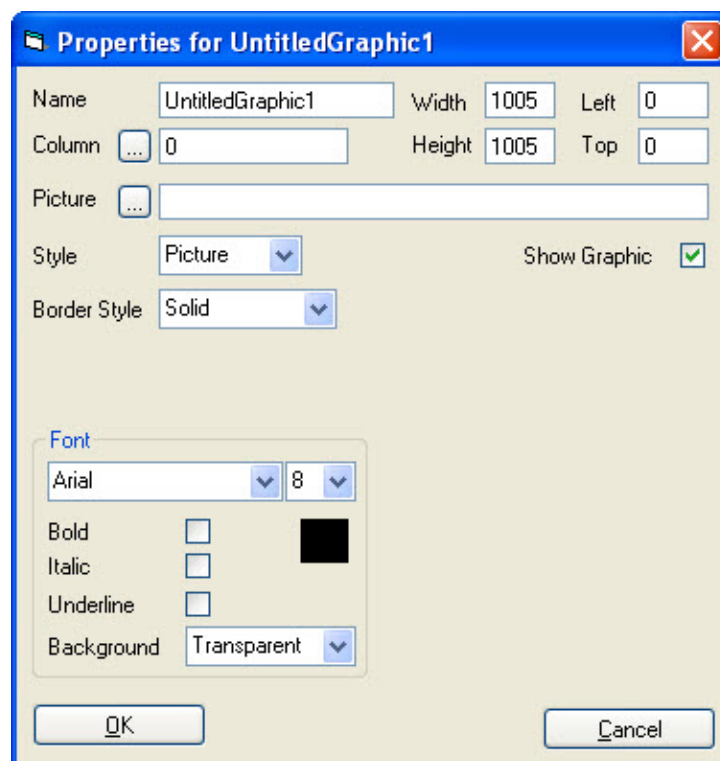


Figure 29: The graphic object property editor

- Name the graphic object and select the column that contains the graphic eg. **Column 739** (page 1 photo).

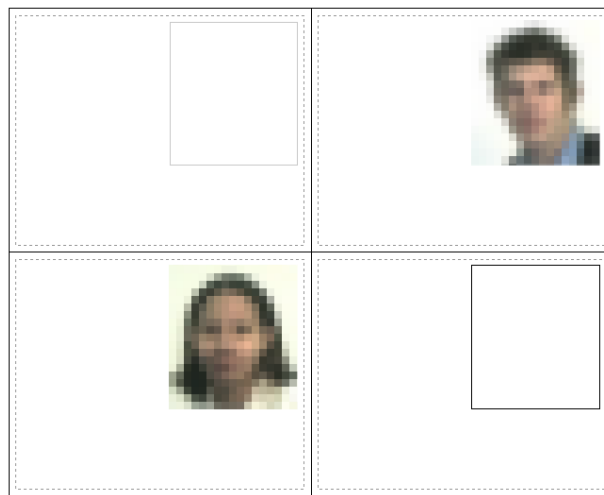


Figure 307: Displaying student photos

For a bar-code beneath the photo.

- Add another graphic object.
- Drag it to the desired position and resize it.

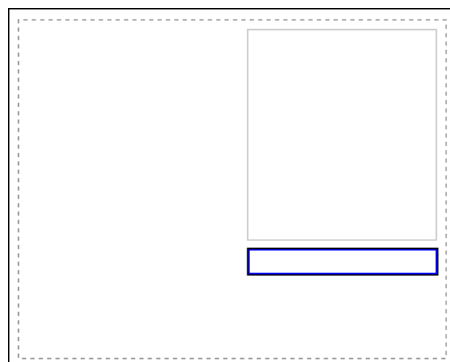


Figure 318: Creating a barcode graphic object

- Edit it.
- Select Column 24 (enrolment number).
- Change the **Style** to Barcode and the **Border Style** to None (barcode readers don't like tight borders).

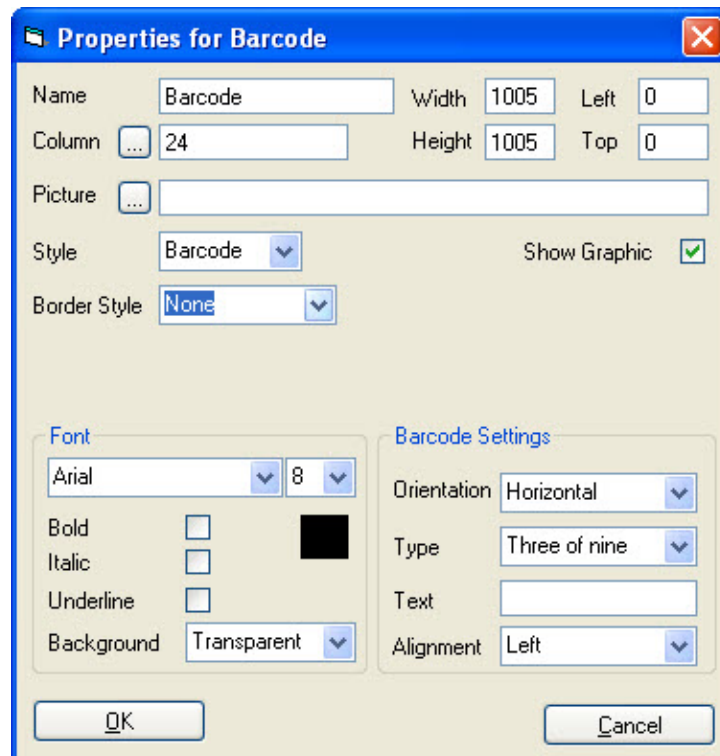


Figure 32: Setting properties for a barcode

The graphic object will change to display a barcode.

Note that the barcodes rendered on screen will be much coarser than the final printed barcodes. This is because the number of dots-per-inch on the screen is not as fine as the printer.


Click **preview**  to see a sample of the final effect.



Figure 330: Sample barcode

If the **Show Graphic** check-box is un-ticked the graphic will display the either the text that is entered in the **Text** box or, if a column other than 0 is set then the contents of the column will be shown. Note that the **Orientation** can be set to Horizontal (default), Vertical or Other. If **Other** is selected then an orientation wheel is displayed and you can set the orientation at any angle. In this case we'll add the student name as a graphic and display it at a jaunty 45 degree angle.

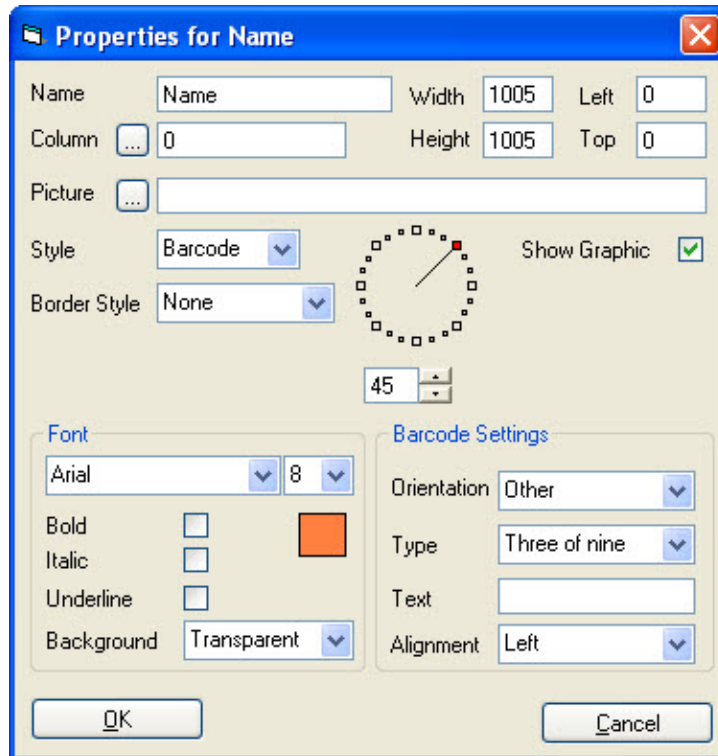
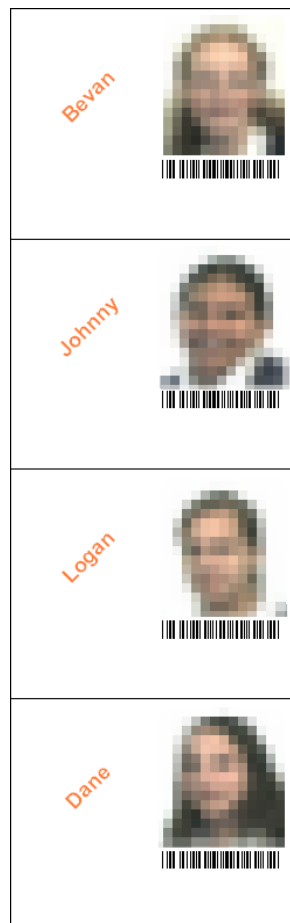


Figure 34: Example of displaying text on an angle



## 19.4 Fast lists

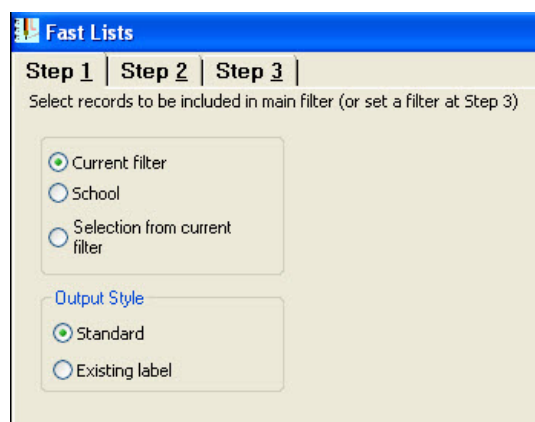
Fast lists are tabular lists based on the same design structure as user-defined lists.

There is a three step 'wizard' process to complete before arriving at the final list. You can save the result and later modify it using the user-defined list dialogue.

### Step 1: Choose a primary filter

The primary filter can be one of three possibilities:

- The current filter as displayed on the main SMLists screen.



**Fast Lists**

Step 1 | Step 2 | Step 3 |

Select records to be included in main filter (or set a filter at Step 3)

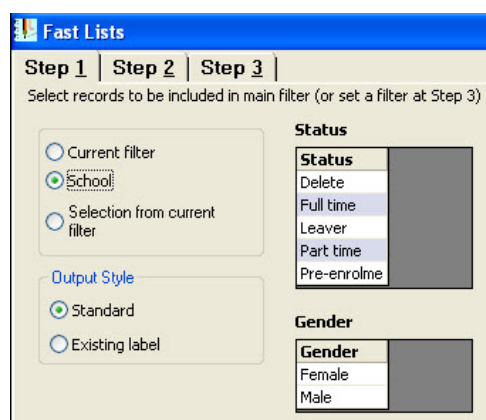
Current filter  
 School  
 Selection from current filter

Output Style

Standard  
 Existing label

Figure 352: The Fast Lists coarse filter

- The whole school - which will allow sub-choices of status and/or gender. The screen for this selection is shown below.



**Fast Lists**

Step 1 | Step 2 | Step 3 |

Select records to be included in main filter (or set a filter at Step 3)

Current filter  
 School  
 Selection from current filter

Output Style

Standard  
 Existing label

**Status**

Delete	
Full time	
Leaver	
Part time	
Pre-enrolme	

**Gender**

Female	
Male	

Figure 363: Fast Lists filter – whole school

- A selection of individuals from the current filter. The screen for this selection is also shown below, via which you can select those students whom you wish to have included in your list.

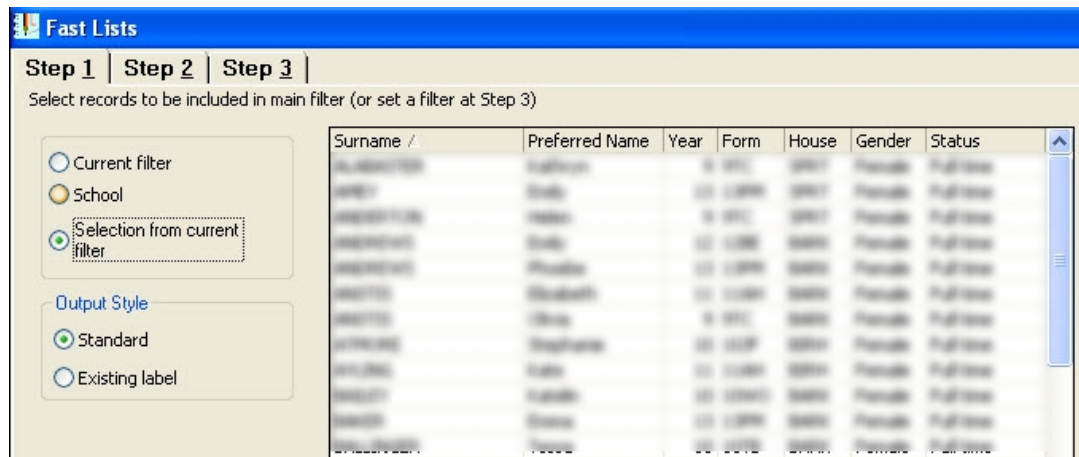


Figure 374: Selecting individual students

*Step 2: Choose a sub-filter*

- A secondary filter can be applied to the selection of students. This filter will be applied to the group selected in step 1.
- The sub-filter can be one of year level, horizontal group, vertical group, ethnicity or option group. When a new tab is clicked, all items in the list are selected by default.
- Use **Select All** / **Select None** to assist your selection. The page headers for each list will be based on the filter chosen in step 2 above.

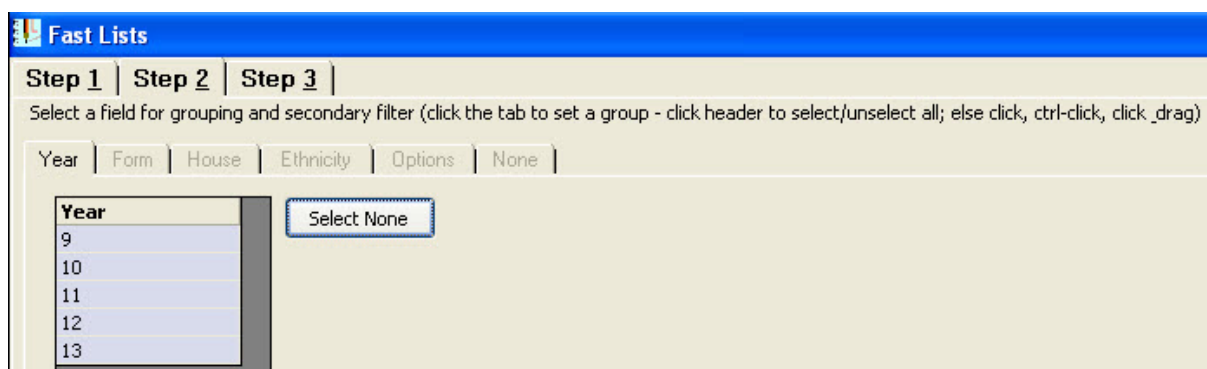


Figure 385: Selecting an item from the sub-filter



Step 3: Choose the database columns to be included in the list

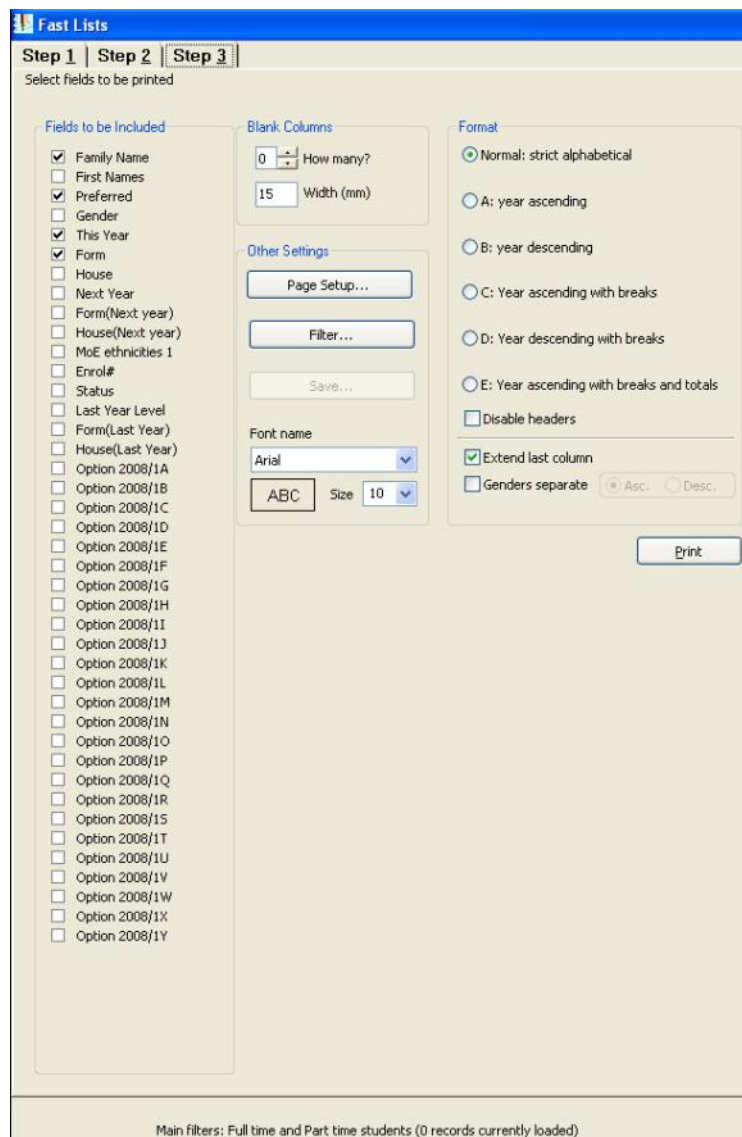


Figure 396: Fast lists extra parameters

- The columns that can be selected are shown on the left. There are also some basic list formats and other formatting options on the right.
- In the centre of the screen are three buttons.
- The first allows you to set the page setup, via the screen shown below.

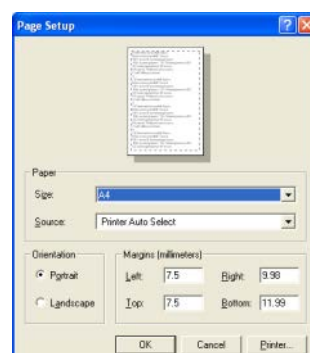


Figure 407: The Page Setup screen

- The next button applies a filter to the students being included, via the usual student filter screen, shown below. This will supersede any previous filtering you may have done at step 1 and 2.

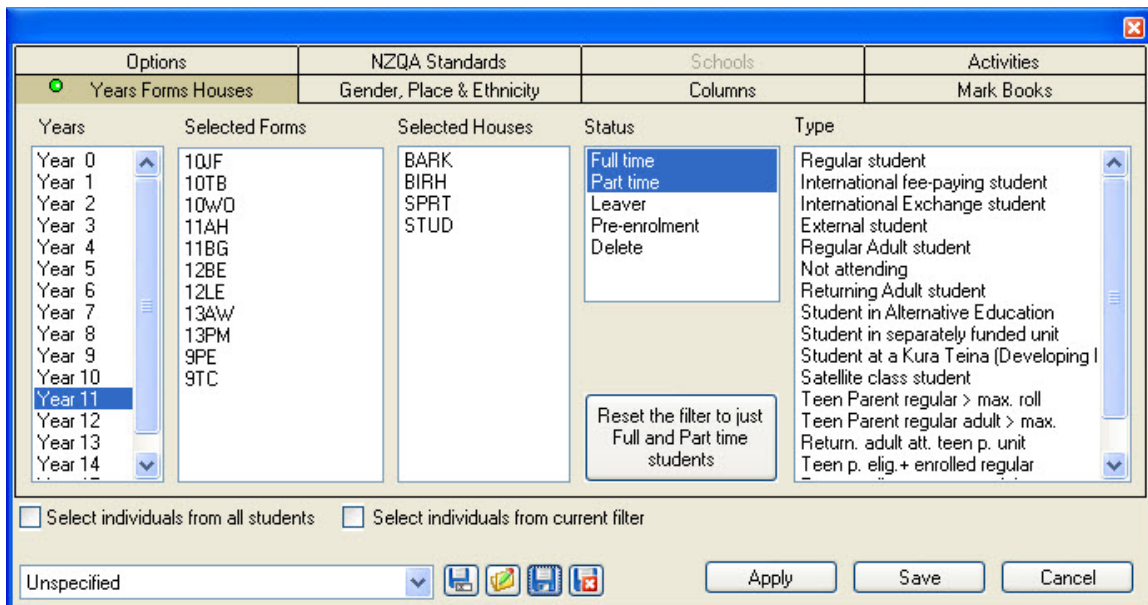


Figure 418: The Student filter

- Once you have decided on your filter, the buttons in the bottom left of the screen can record the details of the filter. This filter will then be available for any of the lists you print via the printing utility. The four little buttons allow you to :
  - Replace the current settings in this filter
  - Rename this filter
  - Save the current settings as a new filter
  - Delete the selected filter
- Once the selections have been made, you can save the list by clicking **Save**.
- Click **Print** to generate the list and display them in preview mode.

## 19.5 Special Lists

This section offers a range of specially designed lists, some of which are quite sophisticated.

The main screen offering the various choices is shown below. On the top left of the screen are the various lists.

Below on the left side are the previously saved list definitions. At the bottom centre is the area where you can specify how you wish to have students grouped when printing for multiple groups.

On the right side of the screen is the area where you specify details relating to your printer and its paper size and shape.

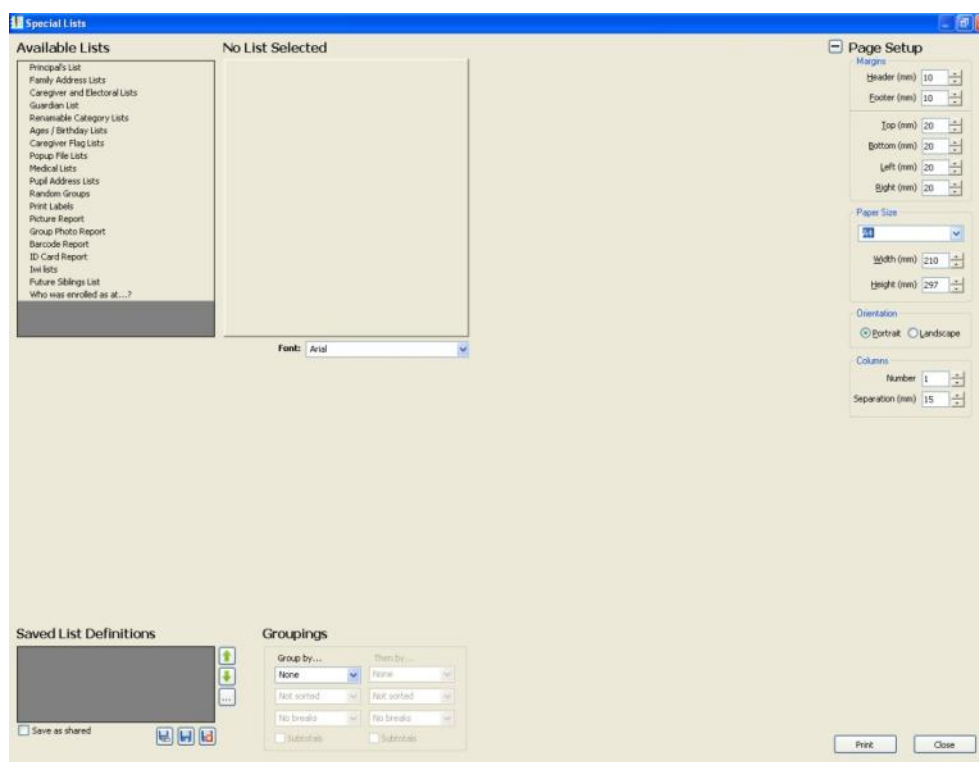


Figure 429: The main special lists screen

Each of the various lists has its own particular specifications and options. These are displayed as each is selected.

A few examples are provided to give an indication of their nature.

Principal's list

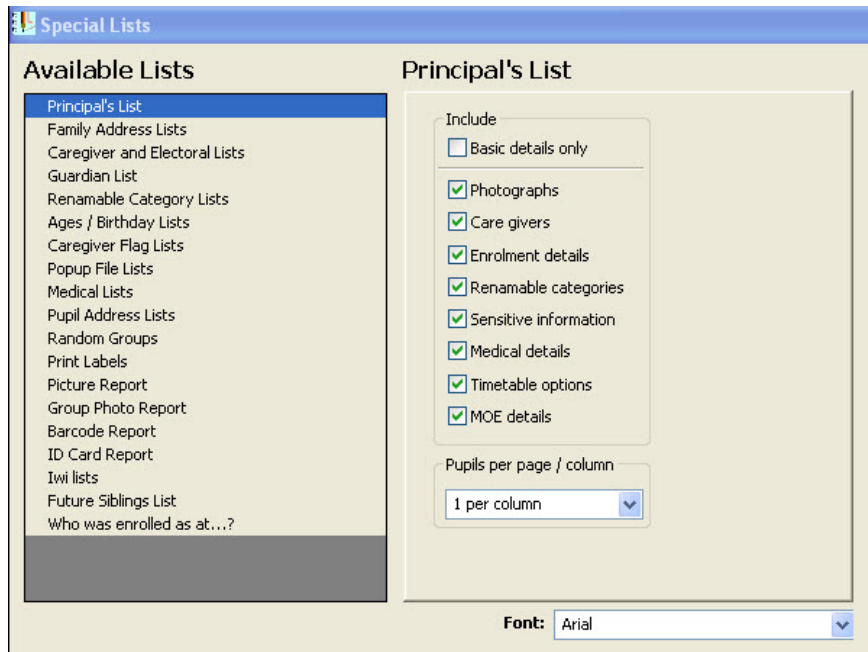


Figure 430: The Principal's list options

An example of a student's entry in this list is shown below.

Principal's List Date printed: 02.03.07

**Bibo (Bibo) ABaggins**

Year: 9 Hobbit role  
 Form: 9A Hobbit  
 Group: W1  
 Gender: Male  
 Date of birth: 01/01/1999  
 Type: Regular student  
 House:

**Caregivers**

Caregiver	Name	Address	Home Phone	Work Phone	Cell Phone
Mother	ABaggins, Bilbo	Hobbit Hole, Hobbiton	123456	654321	

**Enrolment Details**

Enrolment No.:	07.013	Date first started:	01/01/2004
Previous School:		Date first attended:	07/02/2007

**Renamable Categories**

Category	Column 1	Column 2	Column 3	Column 4
MOE details 1	Not stated			
House 1	House			

**Medical Details**

Doctor:	(not specified)
---------	-----------------

**Timetable Details**

Figure 441: A Principal's list page

Family address lists

Special Lists

**Available Lists**

- Principal's List
- Family Address Lists
- Caregiver and Electoral Lists
- Guardian List
- Renamable Category Lists
- Ages / Birthday Lists
- Caregiver Flag Lists
- Popup File Lists
- Medical Lists
- Pupil Address Lists
- Random Groups
- Print Labels
- Picture Report
- Group Photo Report
- Barcode Report
- ID Card Report
- Iwi lists
- Future Siblings List
- Who was enrolled as at...?

**Family Address Lists**

Based on pupil name and address  
 Based on family data
 

Show physical address  
 Show postal address

**Based on pupil name and address:**  
 This process uses the student's surname plus their 'page one' address fields as the sort key and groups the output based on changes to this key.

**Based on family data:**  
 This process uses the details of the student's attached family. The family details data includes a title, salutation and the ID of the primary caregiver. This ID is used to look up that caregiver. The list includes the family title and the address and phone details of the primary caregiver followed by the basic details of each student attached to the family.

Font:

Figure 452: Family address lists

Family Roll Based on address Date printed: 02/03/07

				Address	Home	Work	Cell
<b>Adiggins</b>							
Soto	9	9A	W1	Hobbiton Hobbiton	Mother 129458	854921	
<b>Alan</b>							
				Mr & Mrs Alan mal to	Home	Work	Cell
Anna Rebecca	11	111	53	5 Andrew Street Raukawa mal to	Mother 8357313	8444820	8444820
					Father 8357313	8444820	
					Nurse 8358807		
<b>Alkan</b>							
				Mr & Mrs Alkan mal to	Home	Work	Cell
Janica Michelle	11	111	W2	42 Alkan Road Crowsdale mal to	Mother 8430587	8430587	
					Father 8430587	8340096	
					Nurse 8431463		
<b>Alkerl</b>							
				Mrs Alan Malto	Home	Work	Cell
Shun Ashlag	10	10 F	W12	38 Ward Crescent Raukawa Student	Mother 127343075		
					Student 843889		
<b>Alan</b>							
				Mr & Mrs Alan	Home	Work	Cell
Sukman	10	10 K	W3	13 Shoshan Street Bay View	Mother 8387464	121073839	
					Father 8387464		
					Nurse 8431998		
<b>Alan</b>							
				Mrs Maureen Alan Mal	Home	Work	Cell
Ayle Grace	10	10 F	M7	48 Outlook Street Raukawa mal to	Mother 121174268		
					Father 1212104265		
					Nurse 8337189		
<b>Al-Samran</b>							
				Mr Crocker and Mrs Al-Samran	Home	Work	Cell
Laurin	10	10 F	104	107 Salsomano Road Raukawa	Mother 8355254		121138798
					Father 8355254		12102219890
<b>Anderson</b>							
				Mr & Mrs Anderson	Home	Work	Cell
Delina Han	10	10 H	88	21 Pine Street Palmerston	Mother 8783898	8782402	
					Father 8783898	8787926	
					Nurse 8780893		
<b>Anderson</b>							
				Mr & Mrs Anderson	Home	Work	Cell
Smith Louise	10	10 R	A2	127 Wharangi Road Raukawa	Mother 8449833	8447264	
					Father 8449833	8784958	
					Nurse 8778987		

Figure 463: Family address lists

An example of a partial family address list, where the emergency caregiver is highlighted in yellow.

Caregiver/Electoral Rolls

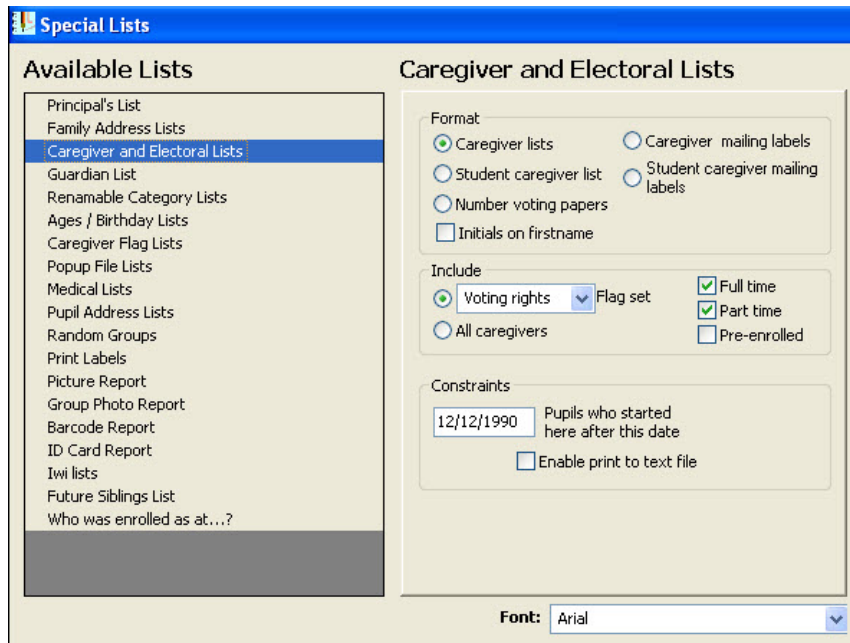


Figure 474: Caregiver/electoral roll settings

Guardian list

This generates a list of those students whose family name differs from that of their prime caregiver and has no parameters.

Renamable category lists

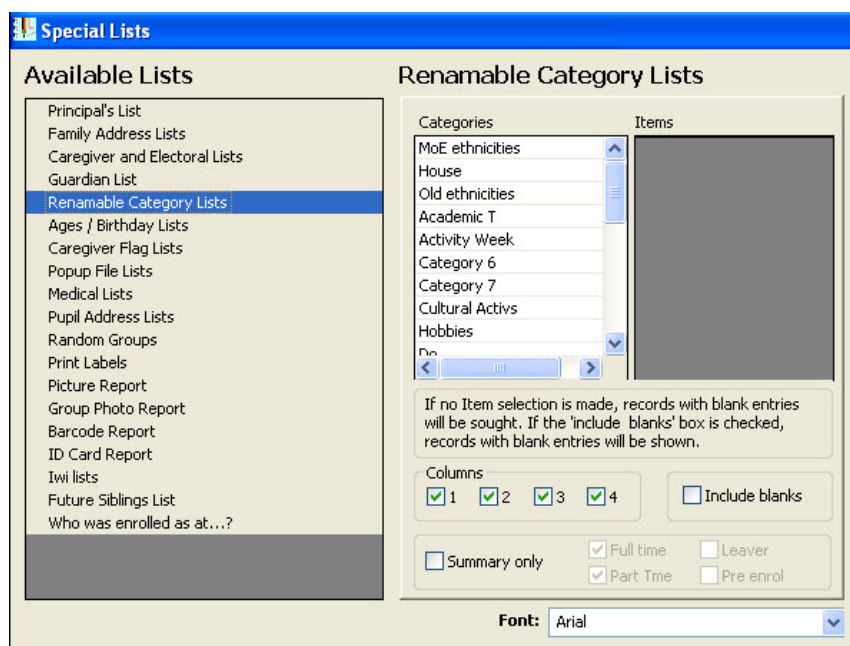


Figure 485: Renamable category settings

*Ages/Birthdays lists*

This list can be used to identify those of a particular age or birthday.

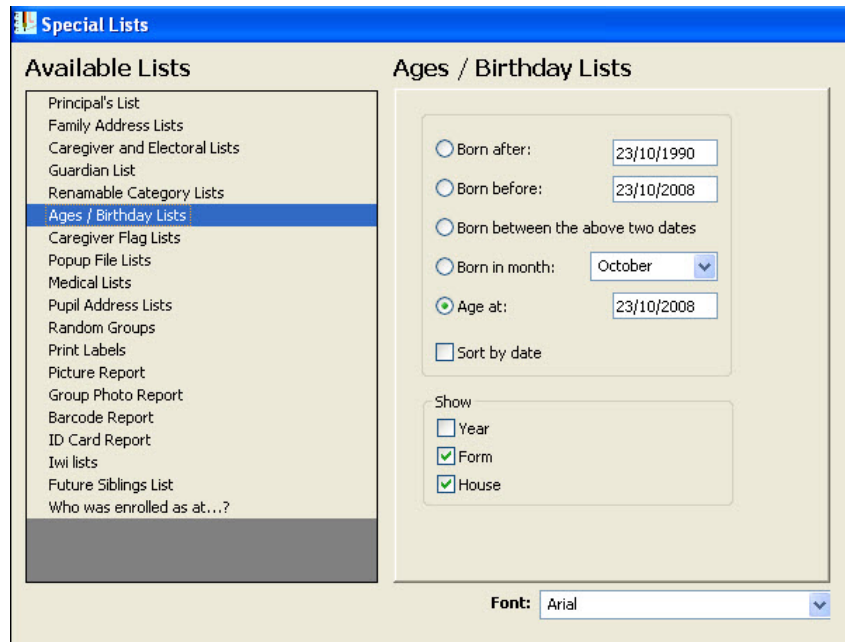


Figure 496: Age / birthday settings

*Caregiver flag lists*

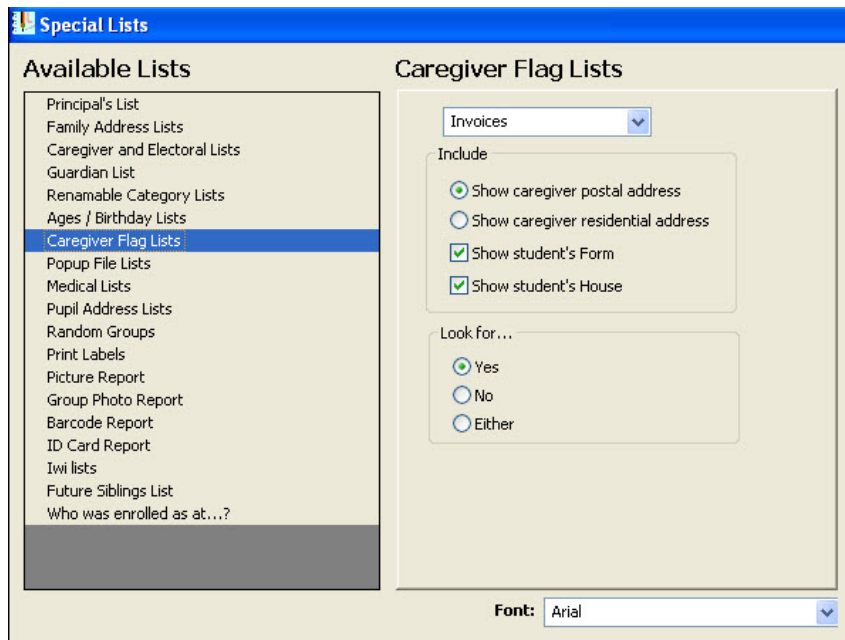


Figure 507: Caregiver flag list settings



Popup file lists

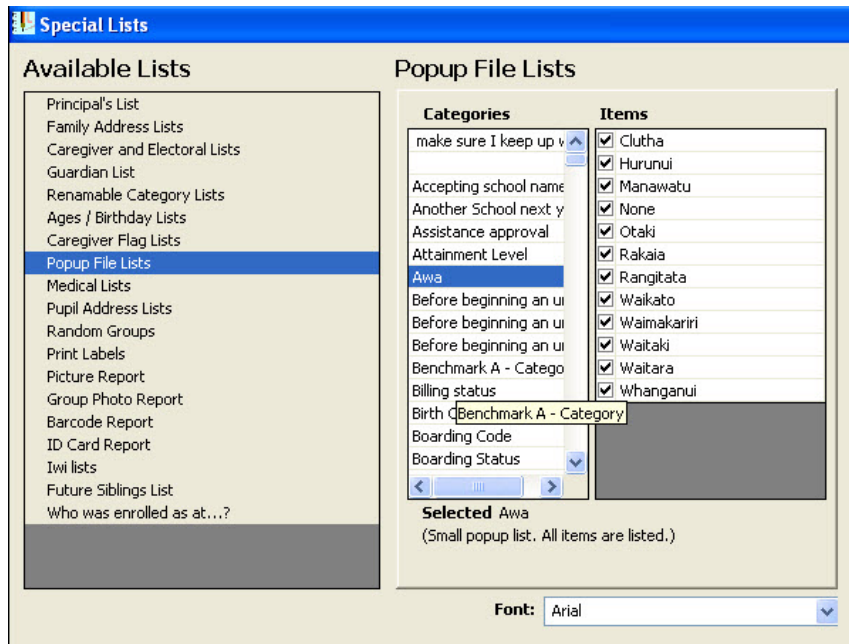


Figure 518: Popup file list settings

Medical lists

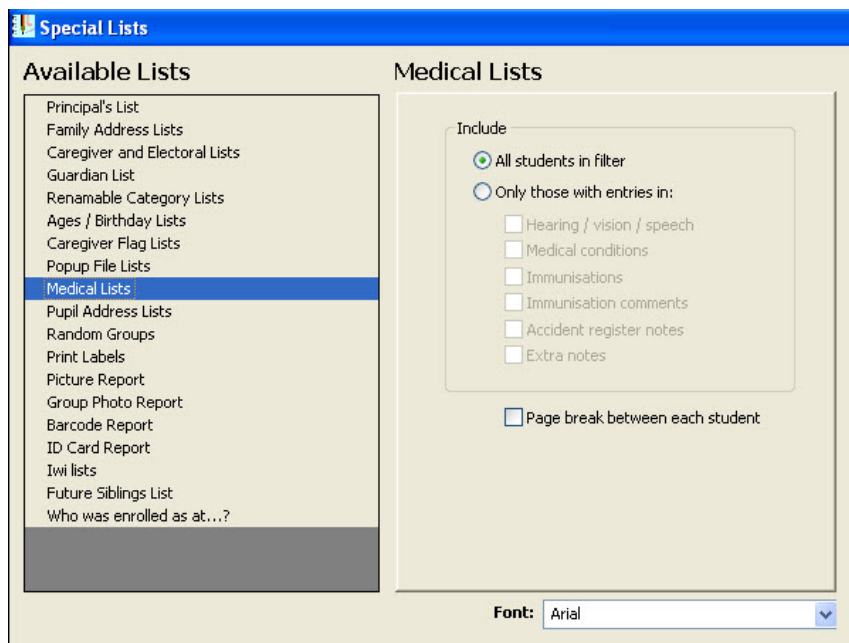


Figure 529: Select required medical condition



Pupil Address lists

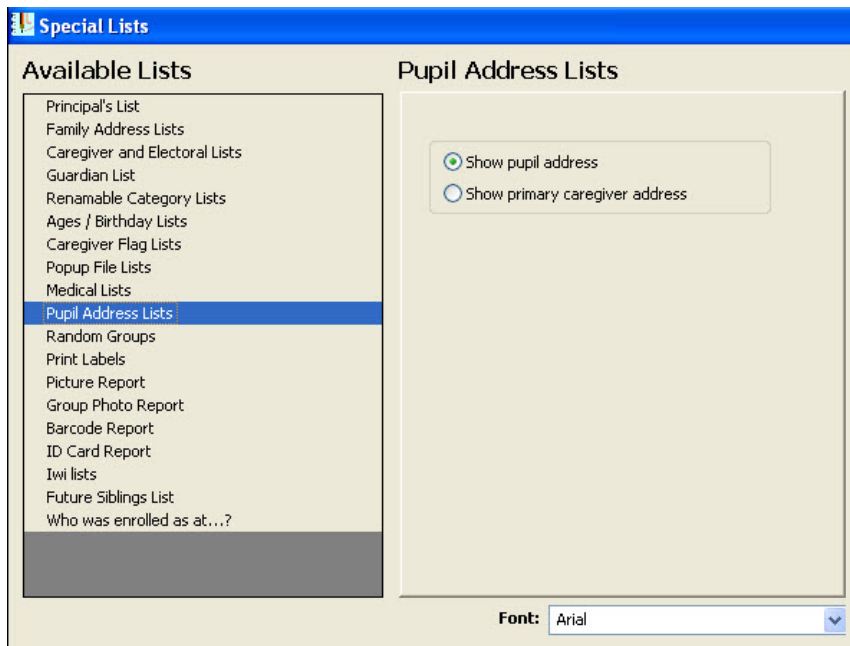


Figure 530: Address list settings

Student Labels

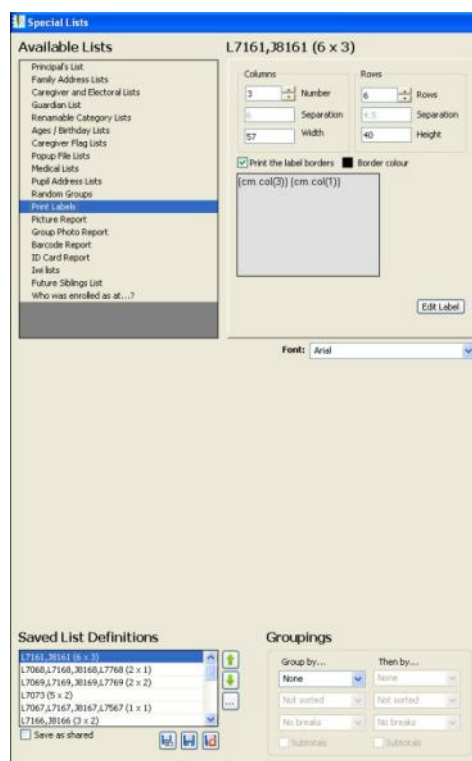


Figure 541: Label settings

Click **Edit label** to design the label, using the code insertion process in the Word Processor.

To remove blank address lines and add a post code, enter the scripts below in >Print Labels>**Edit Label**, with no spaces in the caregiver's address for caregiver one. Student name followed by the family name and addresses in a continuous line (must not press Enter between address lines),

then followed by postal code. Ensure the city is the last address, although it doesn't matter which address line, and that the post code follows the city.

For 'Reports Yes' setup:

```
{cm.col(3)} {cm.col(1)}
{cm.cg("B45")}{cm.IIF("{cm.cg("15")}"<>"",chr(11) & "add 1: {cm.cg("15")}"
,"")}{cm.IIF("{cm.cg("16")}"<>"",chr(11) & "add 2: {cm.cg("16")}"
,"")}{cm.IIF("{cm.cg("17")}"<>"",chr(11) & "add 3: {cm.cg("17")}"
,"")}{cm.IIF("{cm.cg("18")}"<>"",chr(11) & "add 4: {cm.cg("18")}"
,"")}{cm.IIF("{cm.cg("19")}"<>"",chr(11) & "add 5: {cm.cg("19")}" ,")}} Post code:
{cm.cg("110")}
```

For 'Mail to whom' setup:

```
{cm.col(3)} {cm.col(1)}
{cm.col(4)}{cm.IIF("{cm.cg("706")}"<>"",chr(11) & "{cm.cg("706")}"
,"")}{cm.IIF("{cm.cg("707")}"<>"",chr(11) & "{cm.cg("707")}"
,"")}{cm.IIF("{cm.cg("708")}"<>"",chr(11) & "{cm.cg("708")}"
,"")}{cm.IIF("{cm.cg("709")}"<>"",chr(11) & "{cm.cg("709")}"
,"")}{cm.IIF("{cm.cg("736")}"<>"",chr(11) & "{cm.cg("736")}" ,")}} Post code:
{cm.cg("768")}
```

### Barcode report

The barcode report produces class lists of students and their barcodes.

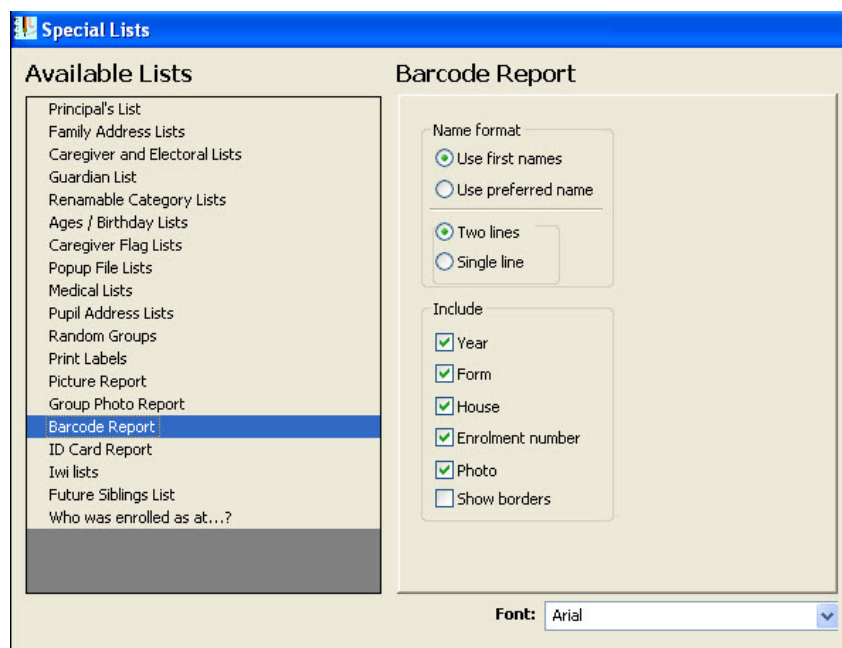


Figure 552: The barcode settings

### Iwi Lists

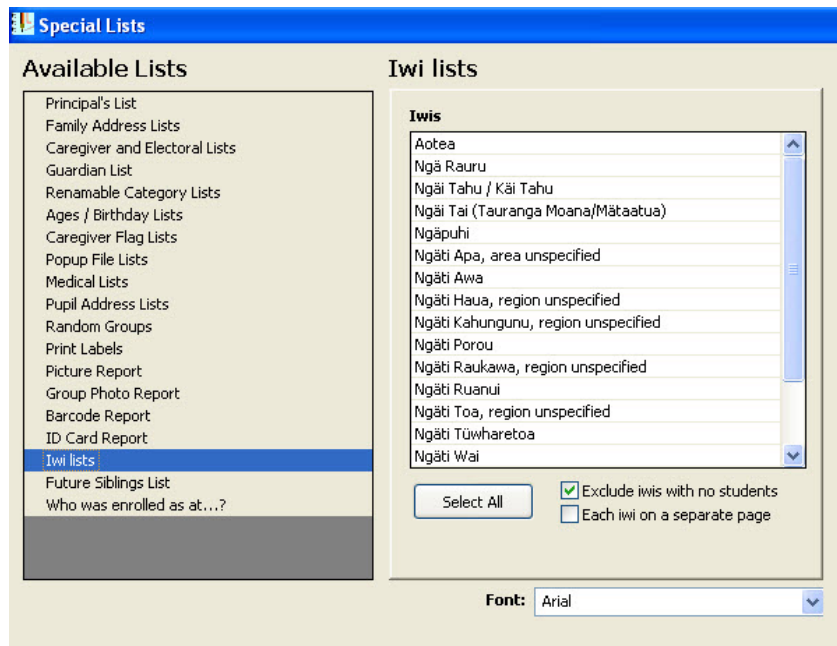


Figure 563: The iwi list settings

### Future Siblings List

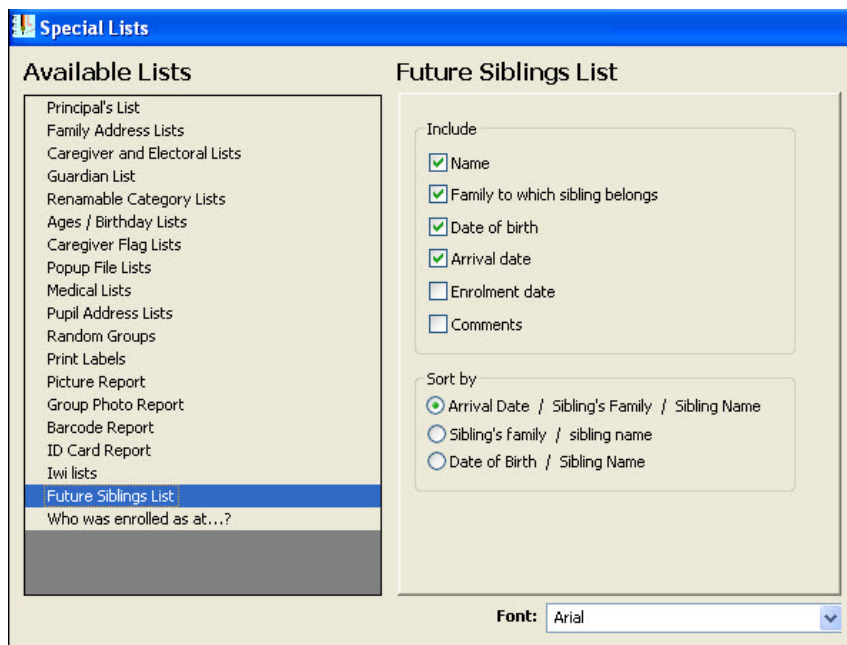


Figure 574: The Future Siblings settings

*Who was enrolled as at ....?*

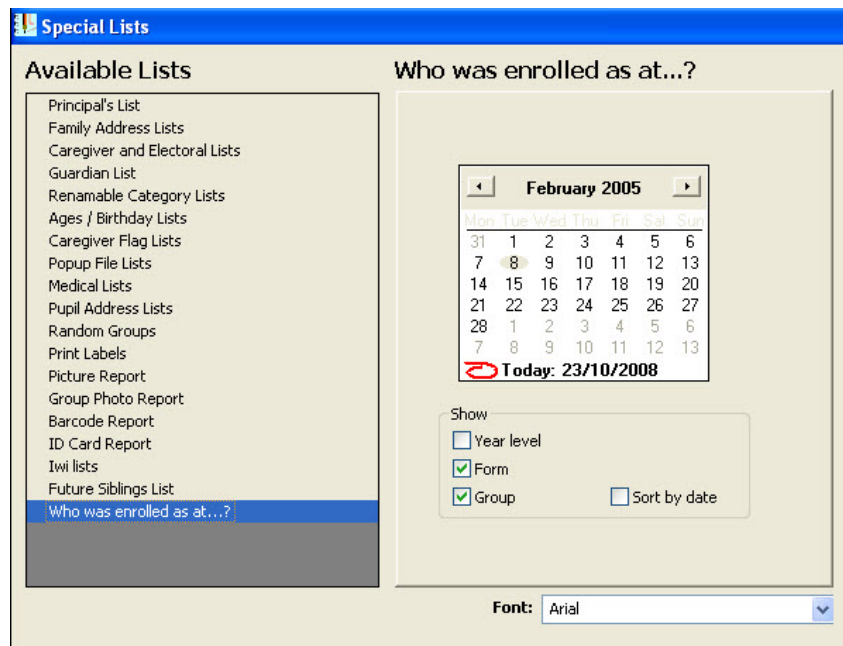


Figure 585: The Who was enrolled as at ....? and settings

## 19.6 Tables

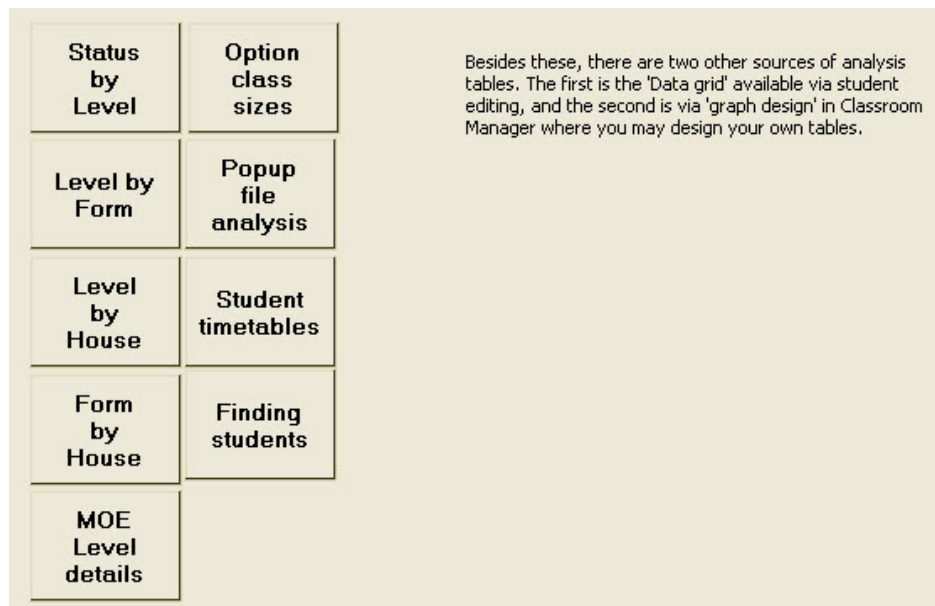


Figure 596: The table printing options

### *Status by level*

The first step in generating a table is to make the decisions offered on the following screen.

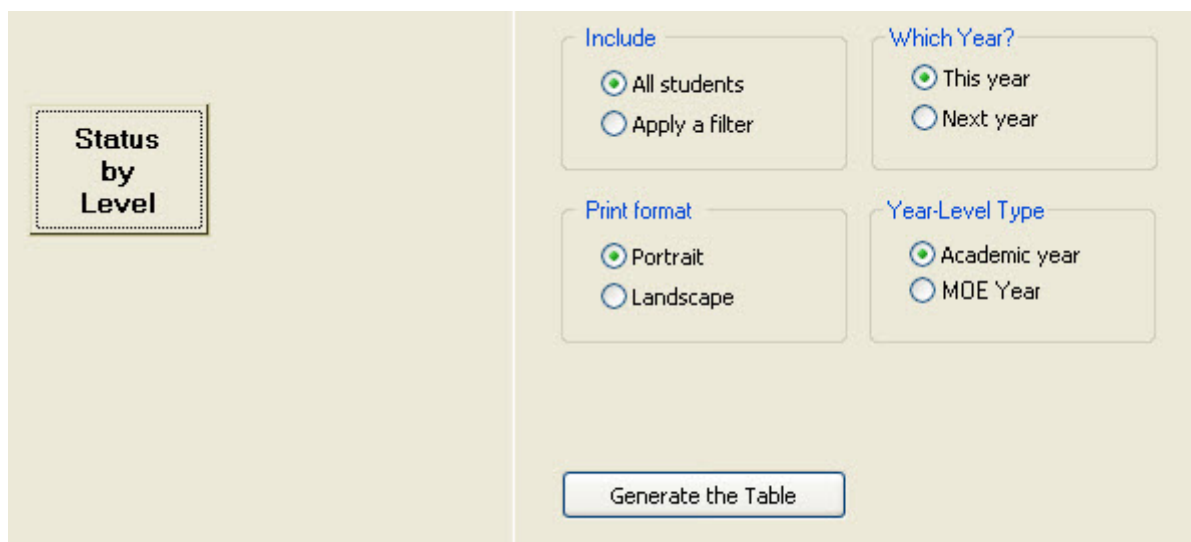


Figure 607: The table settings

Once the two decisions have been made, click **Generate the table** and the students' data will be scanned to prepare the table. Along the way, any students whose relevant data is found to be suspect are listed and, at the conclusion of the scan, their names and suspect entries are displayed. These can either be printed or not.

The usual processes relating to a preview apply. You can enlarge/reduce the display using double left and right clicks on your mouse. You can drag an enlarged table around the screen to view different areas more closely, and you can print the page or pages concerned, all using the buttons at the top of the display.

*Level by Form/Class (Vertical)*

'Vertical group' is generally the students' rooms in a primary school and their house or tutor group in a secondary school.

The same processes apply in the generation of this table as those which applied in the previous example. You must make the same two choices, and after the scan, any suspected faults will be listed. An example of such a list is shown as follows.

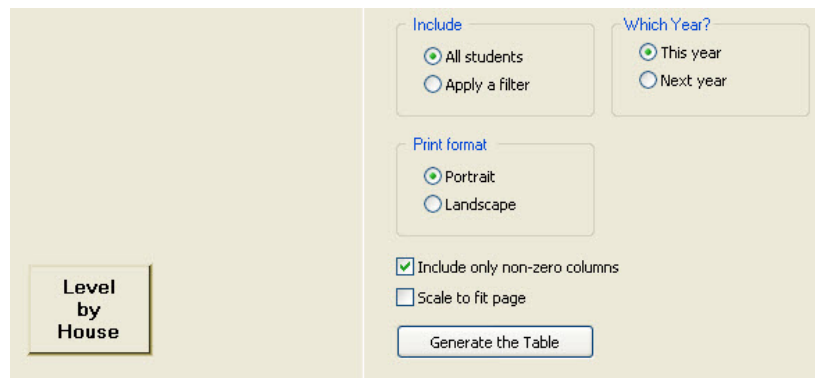
Figure 618: A Level by Form/Class selections

An example of a Level by Vertical Group table is shown below.

Level	Year 7		Year 8		Year 9		Year 10		Year 11		Year 12		Year 13		Year 14		Year 15		Totals				
House	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F	T		
Unknown										1				1	1	1			2	2	4		
adul																3					3	3	
boy																							
DIJN		9		7		49		61		56		33		29							244	244	
MAIT		12		6		44		50		51		31		31							225	225	
MAJN		8		6		56		50		56		27		39							242	242	
WAJM		10		6		55		58		49		37		32							247	247	
WHAD						2		4		8		13		4							31	31	
WHAN		3		1		25		38		37		36		40							180	180	
X																							
XXXX			5			7			8	2	20	2	24	2		1					57	14	71
Y																							
Totals		42	5	26		23		26	8	26	0	20	17	25	17	1	5				59	118	124
						8		1				9		7							8	7	

Figure 629: A Level by Form/Class/Group table

### Level by Group/Tudor (Horizontal)



The screenshot shows a web interface for selecting report options. On the left, a box labeled 'Level by House' is highlighted. On the right, there are three sections: 'Include' with radio buttons for 'All students' (selected) and 'Apply a filter'; 'Which Year?' with radio buttons for 'This year' (selected) and 'Next year'; and 'Print format' with radio buttons for 'Portrait' (selected) and 'Landscape'. Below these are two checkboxes: 'Include only non-zero columns' (checked) and 'Scale to fit page' (unchecked). A 'Generate the Table' button is at the bottom.

Figure 630: A Level by Group/Tudor selections

### Form by Group

Again, the same choices are presented, but this time the chart cross references the class by horizontal group numbers.



The screenshot shows a web interface for selecting report options. On the left, a box labeled 'Form by House' is highlighted. On the right, there are three sections: 'Include' with radio buttons for 'All students' (selected) and 'Apply a filter'; 'Which Year?' with radio buttons for 'This year' (selected) and 'Next year'; and 'Print format' with radio buttons for 'Portrait' (selected) and 'Landscape'. Below these are two checkboxes: 'Include only non-zero columns' (checked) and 'Scale to fit page' (unchecked). A 'Generate the Table' button is at the bottom.

Figure 641: A Level by Group/Tudor selections

### MOE Year levels

This table is simply a list of students displaying their year level, their start date, their birth date and their Ministry of Education year level. For most students their year level and MOE Year level are one and the same but for young children they may be different. A child beginning school in the second half of a year is deemed to be in MOE Year 0 even though in Year 1 at school. This imbalance can continue through primary school so that some students in their last year of a primary school may be in MOE Year 7 and others in MOE Year 6.



Figure 652: MoE Level details selection

### Option class sizes

This table displays the number of students in each of the option classes at each level within the selected set of options.

The first step is to select the option set and the required level, via the screen shown below.



Figure 663: The set and level choices

### Popup file analysis

All of the various popup files are displayed on the selection screen, as shown below.



**Popup file analysis** Select a column / popup

Column	Connected popup
Invoices	Yes/No
Reports	Yes/No
Nationality	Nationality
Language	Language
Previous school	School
Form	Form
House	Tutor
Form(Next year)	Form
House(Next year)	Tutor
Gender	Gender
Type	Type
Special Education	Special Education
Status	Status
Relationship1	Relationship

**Include**

All students  
 Apply a filter

**Print format**

Portrait  
 Landscape

Include only non-zero columns

Generate Table

Figure 674: Selecting the popup for analysis

### Student timetables

To print timetables, make your format selections from the range of possibilities offered via the following screen.

Single page timetables, or more than one per page, can be printed.

**Individual Student Timetables**

Timetable cell Format

Line, class and room on separate lines  
 Line / class and room on two lines  
 All on one line

Print format

One timetable per page (portrait)  
 One timetable per page (landscape)  
 Two timetables per page (portrait)  
 Three timetables per page (portrait)  
 Four timetables per page (landscape)

Select option details

Select year: 2008

Select option set:

Select timetable

Path:

Timetable: Select

Select Students

Figure 685: The timetable printing settings

At the bottom of the area you can select the timetable for which you wish to print students' entries. Once you have made your selections, move to the process of selecting the students' for whom you wish to print. This screen follows.

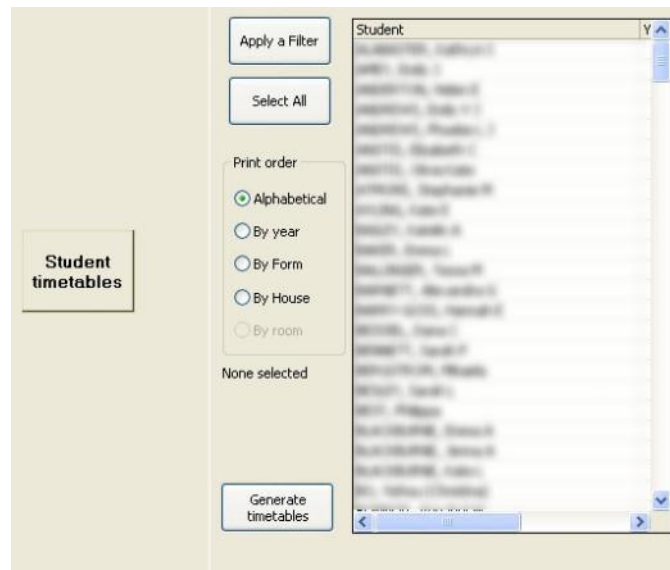


Figure 696: Selection of students

Following this the timetables will be printed.

### *Finding students*

To find students, the first step is to specify the day and the period concerned.

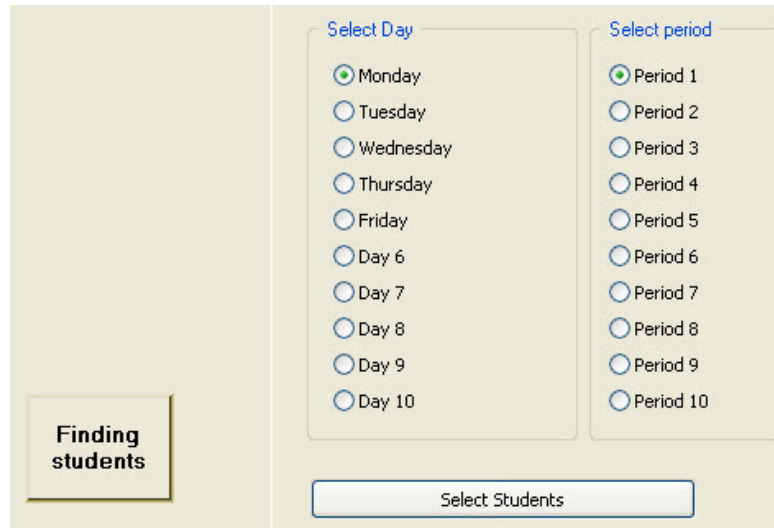


Figure 707: Selection of the day and period

Once you have decided on the day and period, select the students whom you wish to find, using a screen similar to that for timetable printing above. The screen is shown below.

The screenshot shows the 'Finding students' interface. On the left, there are buttons for 'Apply a Filter', 'Select All', and 'Search for students'. Below these are sorting options: 'Print order' with radio buttons for 'Alphabetical' (selected), 'By year', 'By Form', 'By House', and 'By room'. A 'None selected' indicator is present. The main area is a table with columns for 'Student', 'Year', and 'Form'. The table lists students such as ALABASTER, Kathryn I (9 9TC), AMEY, Emily J (13 13PM), ANDERTON, Helen E (9 9TC), ANDREWS, Emily V J (12 12BE), ANDREWS, Phoebe L J (13 13PM), ANSTIS, Elizabeth C (11 11AH), ANSTIS, Olivia Kate (9 9TC), ATMORE, Stephanie M (10 10JF), AYLING, Kate E (11 11AH), BAILEY, Katelin A (10 10WO), BAKER, Emma L (13 13PM), BALLINGER, Tessa M (10 10TB), BARNETT, Alexandra G (10 10JF), BARRY-GOSS, Hannah E (10 10WO), BEISSEL, Dana C (12 12BE), BENNETT, Sarah P (11 11AH), BERGSTROM, Mikaela (12 12BE), BESLEY, Sarah L (13 13PM), BEST, Philippa (12 12BE), BLACKBURNE, Emma A (10 10WO), BLACKBURNE, Jenna A (12 12BE), BLACKBURNE, Kate L (13 13PM), BO, Yizhou (Christina) (13 13PM), and BOWMAN, Anabel W (9 9TC). A search bar is visible at the bottom of the table.

Student	Year	Form
ALABASTER, Kathryn I	9	9TC
AMEY, Emily J	13	13PM
ANDERTON, Helen E	9	9TC
ANDREWS, Emily V J	12	12BE
ANDREWS, Phoebe L J	13	13PM
ANSTIS, Elizabeth C	11	11AH
ANSTIS, Olivia Kate	9	9TC
ATMORE, Stephanie M	10	10JF
AYLING, Kate E	11	11AH
BAILEY, Katelin A	10	10WO
BAKER, Emma L	13	13PM
BALLINGER, Tessa M	10	10TB
BARNETT, Alexandra G	10	10JF
BARRY-GOSS, Hannah E	10	10WO
BEISSEL, Dana C	12	12BE
BENNETT, Sarah P	11	11AH
BERGSTROM, Mikaela	12	12BE
BESLEY, Sarah L	13	13PM
BEST, Philippa	12	12BE
BLACKBURNE, Emma A	10	10WO
BLACKBURNE, Jenna A	12	12BE
BLACKBURNE, Kate L	13	13PM
BO, Yizhou (Christina)	13	13PM
BOWMAN, Anabel W	9	9TC

Figure 718: Selecting the sought students

Finally, each student's timetable will be checked to identify their whereabouts.

**Note:** This process relies on the identification of the relevant timetable which can be set via the timetable printing process.

## 19.7 Settings

The Screen Settings, offers the following features:

- Alteration the screen background colour
- The addition of a 'watermark' on the main printing screen
- The ability to enable or disable sounds
- The ability to export or import selections of previously designed lists

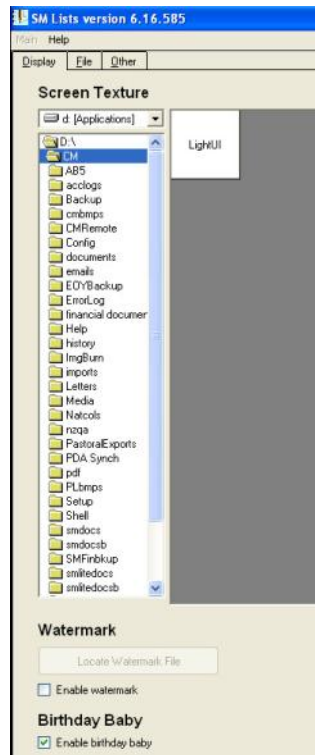


Figure 729: Environment settings

**Note:** If you are experiencing problems with performance speed the watermark should be un-ticked and user interface set to **Light UI**.

### Screen texture

Initially, the printing screen will offer the same texture as that which you have specified in the main part of Student Manager. However, you can browse your hard drive for other bit maps which can then be used to paint the background of the screen in the printing area

Several alternative colours can be found in the \cm\plbmps subdirectory. These are from the CMPlanner module. If you have this package installed then its colours will be available to you. The selection screen is shown below.

### 'Birthday baby' on or off

The bouncy baby who walks across the screen when there is a student birthday can be toggled on or off.

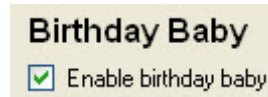


Figure 73: The Birthday Baby display selection

### Sounds

The printing program will generate certain sounds at certain points to draw your attention to the screen. These sounds can be turned on or off.

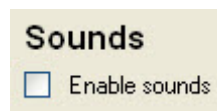


Figure 74: Sound display selection

### Export/Import of previously designed user-defined lists

This process enables you to export a set of lists and to import it again at another site.

To export lists, select them from the top display, as shown below.



Figure 75: Selected designs for export

Once you have made your selection, click **Create export file** and you will be prompted to provide a file name and location, after which the files will be exported.

The import process is the reverse. You must first click on the bottom button to locate the database containing the list definitions, as shown below.

Once located, you may select from the imported lists and have them added to your collection.

## 19.8 Filter

This screen, seen earlier in this chapter, allows you to create, save and apply a filter to the students whom you wish to appear in a list. If you save the new filter then it will be added to the list.

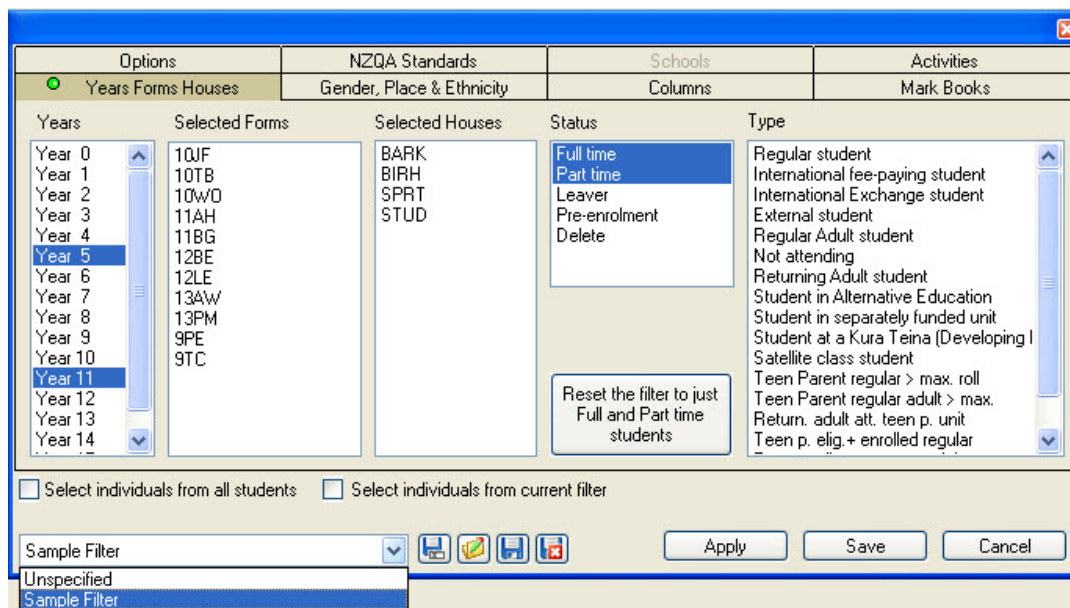


Figure 762: Choosing a previously set filter

### Selecting Individuals

Individuals from the whole school or from a pre-filtered group can also be selected.

In the case of a filtered group, first set a filter in the usual way by selecting items from the various tabs. Then click the **Select individuals from current filter** check-box.

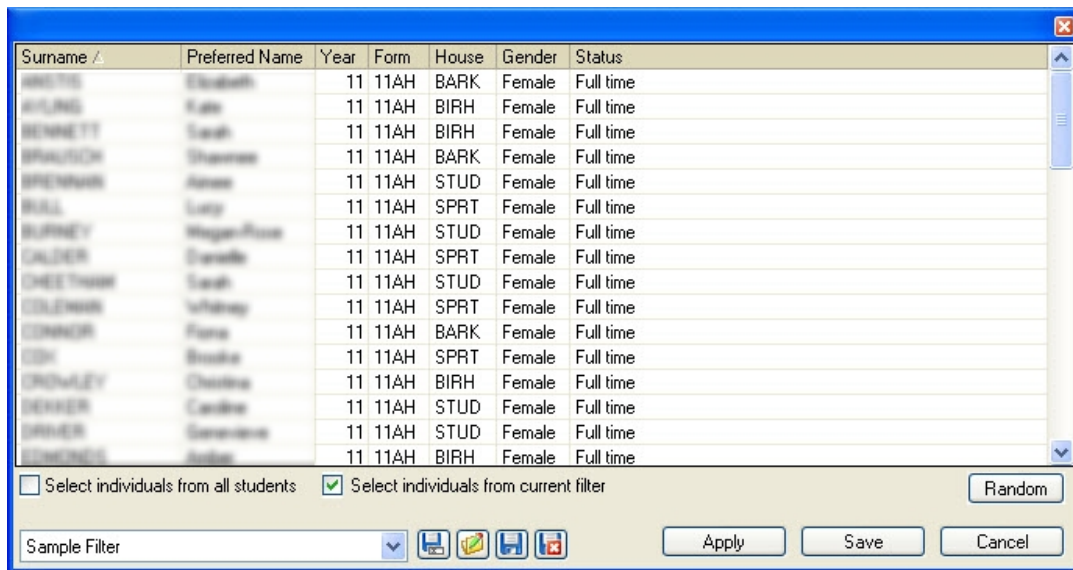


Figure 773: Selecting individuals from a pre-filtered group

Select by clicking on the students you want to choose. If a random selection is required click the button marked **Random** which will open an input box. Enter the number of students to be included in the random list.

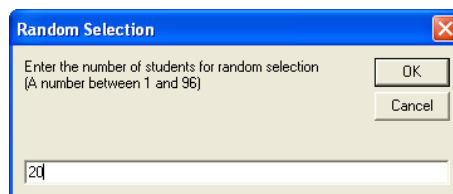


Figure 784: Selecting a random group

You can arrange to view just the selected records by ticking the Show only selection check-box.

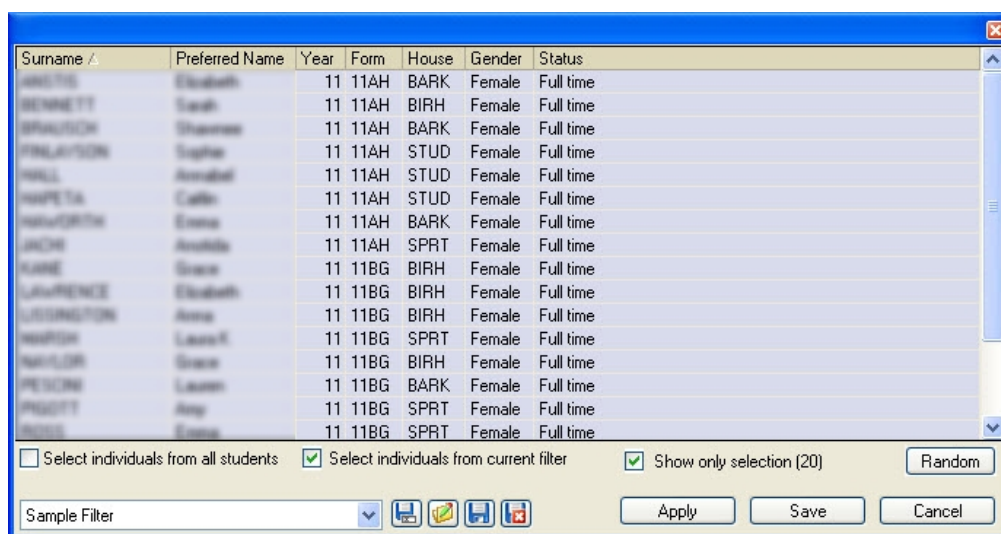


Figure 795: Showing only selected items

## 20 Pastoral

### 20.1 The Pastoral Utility

The pastoral processes within Student Manager provide you with a means of monitoring students' behaviour – their offences, supports, and merits. (Supports are transactions which relate neither to offences or merits.) Thus the pastoral utility can be used to record negative transactions for students (offences), positive transactions (merits), and neutral transactions (supports).

Offences and merits may be given points, and these may be accumulated, to allow certain actions to occur when a certain number of points are reached.

Letters can be pre-designed and brought up for a particular transaction, printed and/or filed. Filed letters can be viewed and, if necessary, reprinted at a later date.

A quick view of a student's transactions may be obtained via the document **pastoral.dmt** view the main view/edit screen, but currently transactions may only be entered or edited via this utility. We intend added the ability to enter transactions directly from the student pastoral document screen. From the main Student Manager menu click the 'Pastoral' button for the main pastoral screen below.



Figure 255: The pastoral menu buttons

Down the left side of the buttons is a filter bar which, when clicked, displays the standard student filter, as shown below.



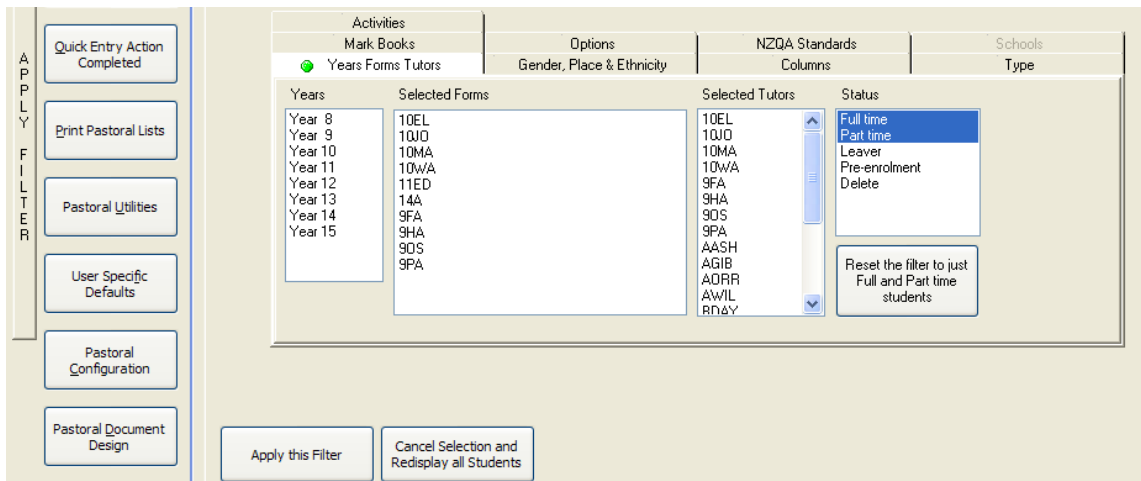


Figure 256: The student filter

This can be used to restrict the search, displays and printing routines to just the filtered students.

## 20.2 View/Enter students' pastoral data

To enter a student's transaction screen, click on 'View/Enter Pupil's Pastoral Data' button and the following screen will be displayed. To view details later for the analysis of Offence data in graphical format, click 'Positive Behaviour for Learning' for the graph options.

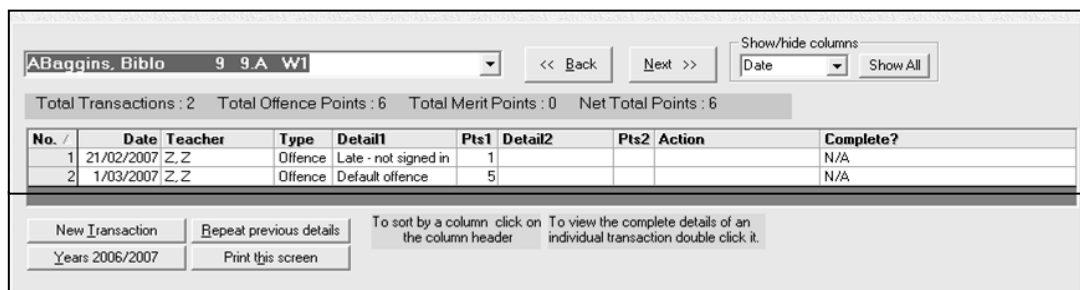


Figure 257: The transactions screen

At the top of the screen is a popup which enables you to select a different student. Type the family name of the student required.

Alongside that are the **Next** and **Back** buttons for moving forward and backwards through the currently filtered students.

An orange bar at the top of the screen displays the current student's total points for offences, supports and merits for the current year.

Below that is the transaction table, and below that are four buttons which allow you to:

- 1 Create a new transaction for this student
- 2 Repeat the previous transaction's details for the current student
- 3 Change to display transactions for a different year
- 4 Print a list of the current student's displayed transactions.

Click on 'New transaction' to create a new transaction and the transaction details screen will be displayed, as shown below.

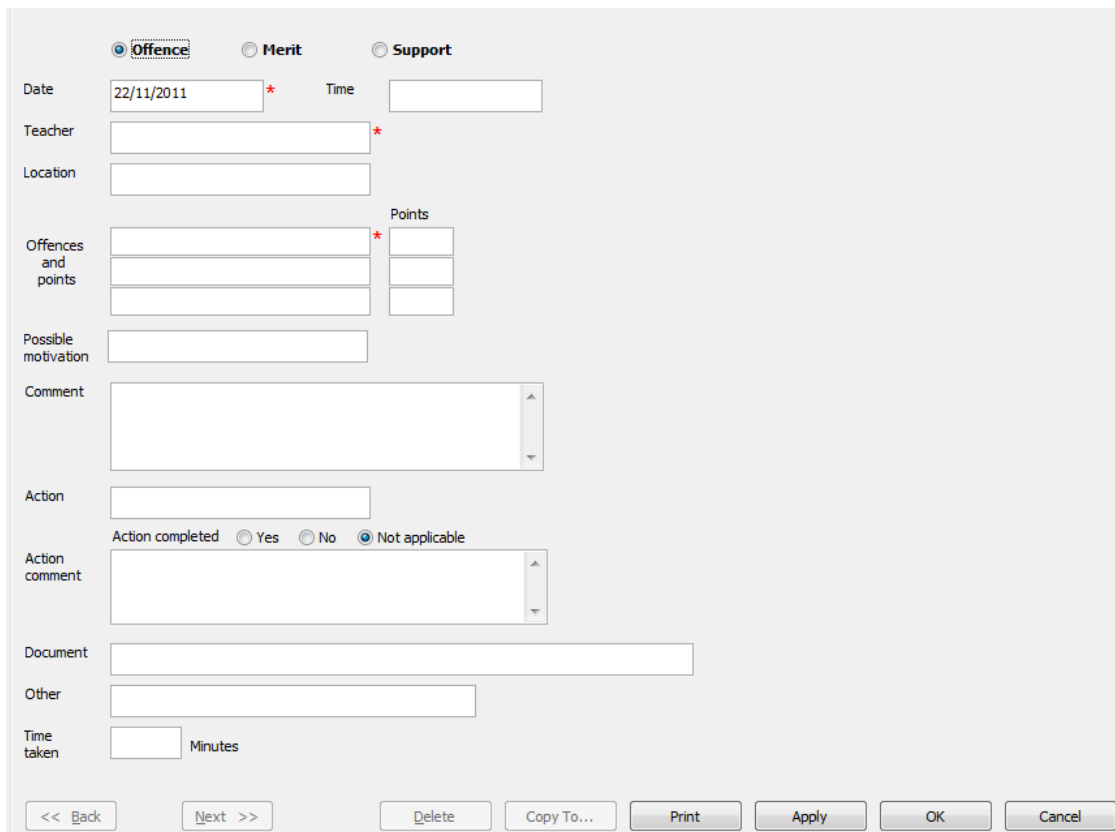


Figure 258: A blank transaction

When entering an individual transaction it is important to note that it is not possible, nor is it desirable, to mix both merits and offences on the same transaction. Instead you should create separate transactions for offences and merits. Enter a transaction by filling in the various details.

The first step is to decide whether the transaction relates to an offence, a support or a merit. Select this from the possibilities displayed on the screen. Time, Location and Motivation fields have been added to align pastoral functionality with the Positive Behaviour for Learning work implemented by the Ministry.

The first detail is the member of staff involved. Click in the area labelled **Teacher** and a list of the staff members will be displayed – select from dropdown.

The order in the list may be set via User-specific defaults, dealt with shortly.

Figure 259: Selection of the Offence(s)

Once the staff member has been selected, if known record the location and move to the offence itself. You can enter up to three offences per transaction and each may or may not have points associated with it. When you click in an offence slot, the list of offences (set up via configuration) will popup.

Select the offence(s) and your choice(s) will be displayed. Each offence can have a default number of points set against it and these points will also be displayed when you select the offence. If you subsequently wish to alter the default points then you can do so by editing the display.

Complete action and other details, none of which are essential for the transaction to be saved. These are:

- An action comment – further details concerning the action which you have selected.
- Document – where you can refer to any document(s) associated with the transaction.
- Other – any other detail which you might wish to record.
- Time taken – the time taken in dealing with a transaction can be recorded.
- There is also a tick box which you can tick to signal that an action has been completed.

Once you have completed the transaction, click **Save** and you will be returned to the main screen displaying the student's transactions. The transaction is shown below.

BRAKUS, Stephen 10 Yr10 FC3													
Total Transactions : 2 Total Offence Points : 0 Total Merit Points : 0 Net Total Points : 0													
No. /	Type	Date	Time	Teacher	Location	Detail1	Pts1	Detail2	Pts2	Detail3	Pts3	Motivation	Comment
1	Offence	22/03/2012		SMITH, JOHN	Main Building								
2	Offence	22/03/2012		SMITH, JOHN	Bike lockup								

Figure 260: Transactions displayed

In addition to creating a new transaction, you can repeat the current transaction for a further student. There are three ways of moving to another student.

- 1 Use the **Next** button at the top of the screen. This is only useful if (most of the) students in the filter are having the same transaction recorded against them.
- 2 Use the standard **Alt-S** key combination to bring up the student search tool, type in a little of the required family name and select the required student from the list, either by clicking on them or by typing the number alongside their name.

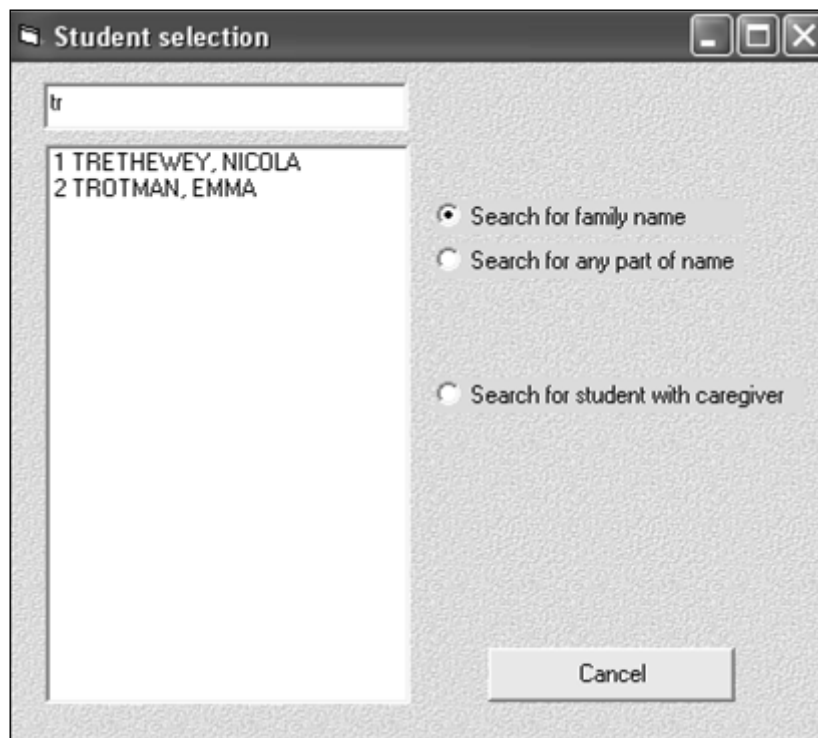


Figure 261: Searching for another student - method 1

- 3 Use the popup list of students at the top of the screen. Either click on the arrow at the right hand end of this and the list will drop down, enabling you to select the next student required, as shown below, or simply type in the student's family name.

**NOTE:** If you simultaneously have the view/edit window open, displaying a student's documents (detail screens) then switching to a different student here will cause those other screen/s to be updated too – so that when you Alt-tab back to the view/edit area the selected student's documents will be visible. On a slow network this may take some time, and it is best to hold as few documents open simultaneously as possible.

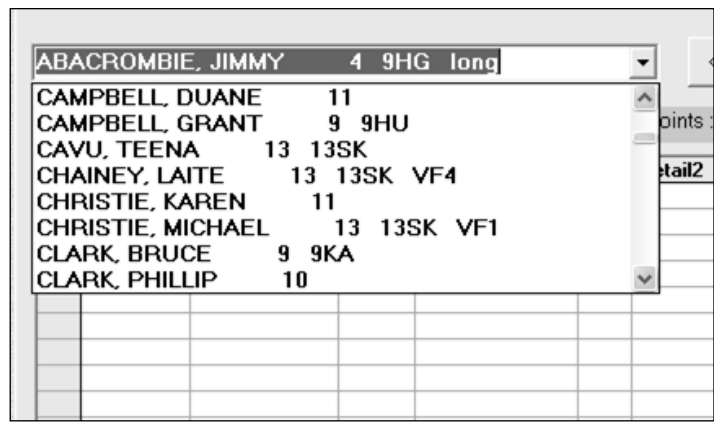


Figure 262: Searching for another student - method 2

Once you have the required student displayed, click on the second button, **Repeat previous details**, and the transaction detail screen will appear, with the previous details displayed, ready for your alterations and/or approval.

**Pastoral transaction detail for TRETHERWEY, NICOLA**

Date: 25/06/2004

Teacher: Davenport, Dennis Points: 4

Offence and Points: Stealing

Offence:  Offence  
Merit:  Merit  
Support:  Support

Comment: Took the apple from my desk

Action: Detention Action completed:

Action Comment: Must bring me a new apple tomorrow (Granny Smith)

Document: Letter sent home

Other: Time taken: 7 minutes

Buttons: << Back, Next >>, Delete, Save, Cancel, Print a document

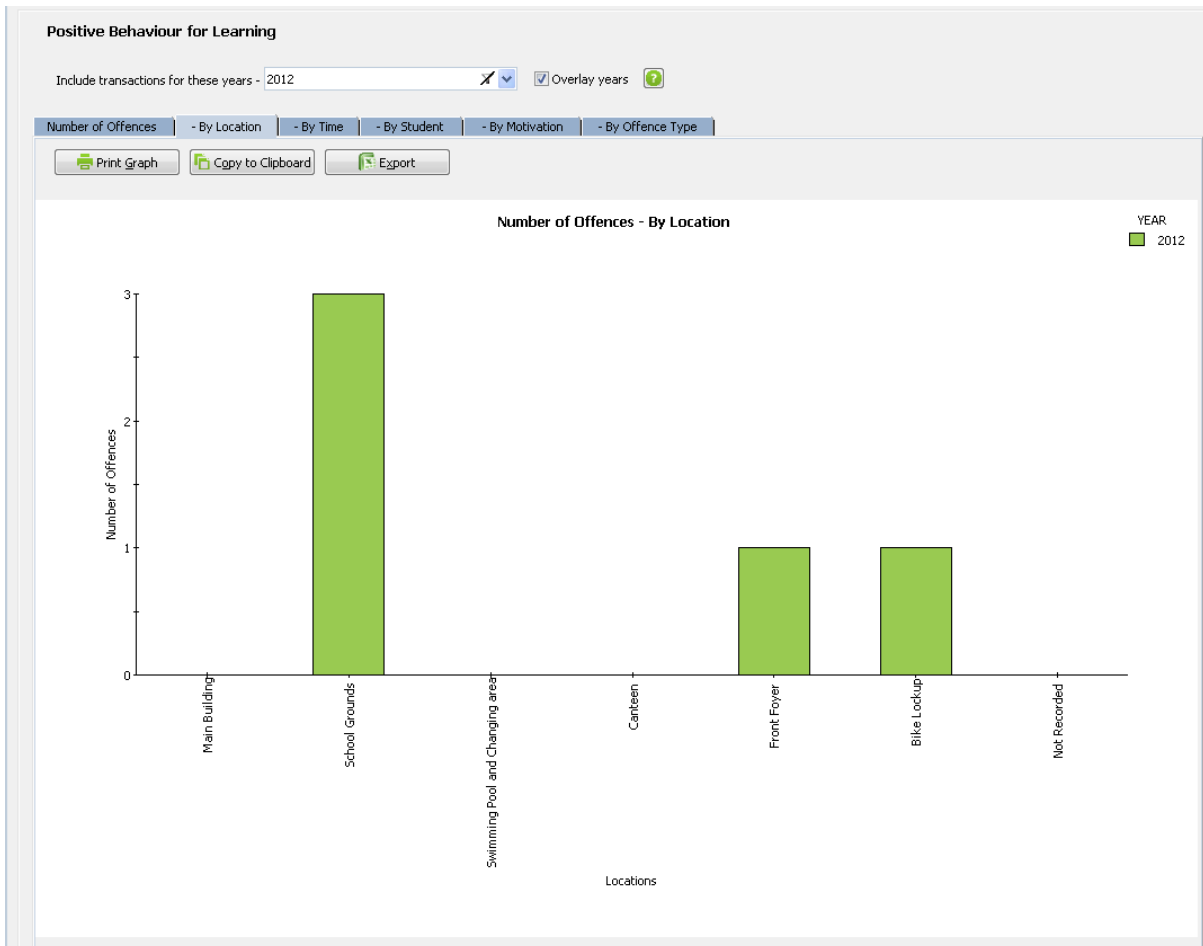
Figure 263: The repeated transaction

### 20.3 Offence data PB4L Graphs

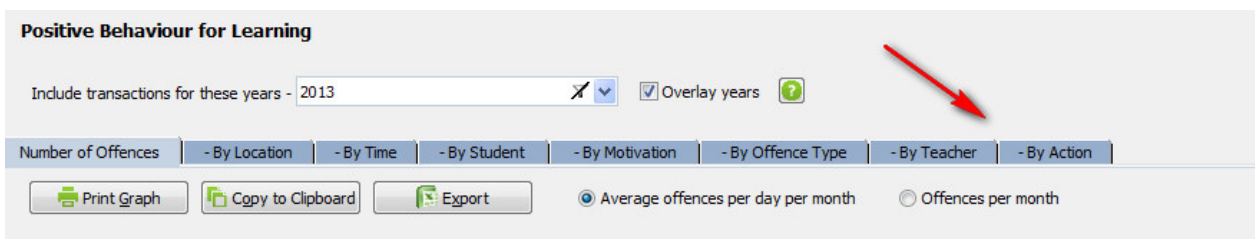
Graphs displaying the analysis of Offence data are shown (by default for the current year) by:

- Location
- Time
- Student
- Motivation
- Offence Type

To include transactions from other years, click on the drop down at the top of the screen and tick the desired year/s (at least one). When more than one year is selected, the years are over-laid. For example, transactions for January 2011 and January 2012 would appear as bars beside each other. By un-ticking the 'Overlay Years' check box at the top of the screen, the bar for January 2012 appears after December 2011. The same data underlies both graphs, only the view is changed.



To display the actual value represented by a specific bar, hover the mouse over the bar and the data value will pop up as a label above it. Subsequently By Teacher and By Action options have been added.



Average Number of Offences per Day per Month

## Output

- Each graph can be printed directly to the default printer by clicking the 'Print graph' button.
- Each graph can also be copied to the clipboard as an image by clicking the 'Copy to Clipboard' button, and then pasted directly into another document.
- Click the 'Export' button above a graph to create a file containing the data in comma-delimited format which may be opened in Excel.
- The 'Number of Offences' graph has the option of displaying the average offences per day per month – or alternatively, the total number of offences per month. Select the option required using the option buttons above the graph.
- The 'Number of Offences – By Time' graph has the option of displaying the number of offences to the nearest hour or to the nearest quarter hour. Select the option required using the option buttons above the graph.
- The 'Number of Offences – By Student' graph contains all the students in the filter. If there are a large number of students in the filter, the graph can become difficult to read. The filter should be adjusted to contain a smaller number of students.

## Select another year

The following screen will appear, allowing you to both select a different year, and to make it the default year to be used whenever you visit the pastoral utilities. In the example below, there are only nine transactions for the current year and no other transactions are available for other years.

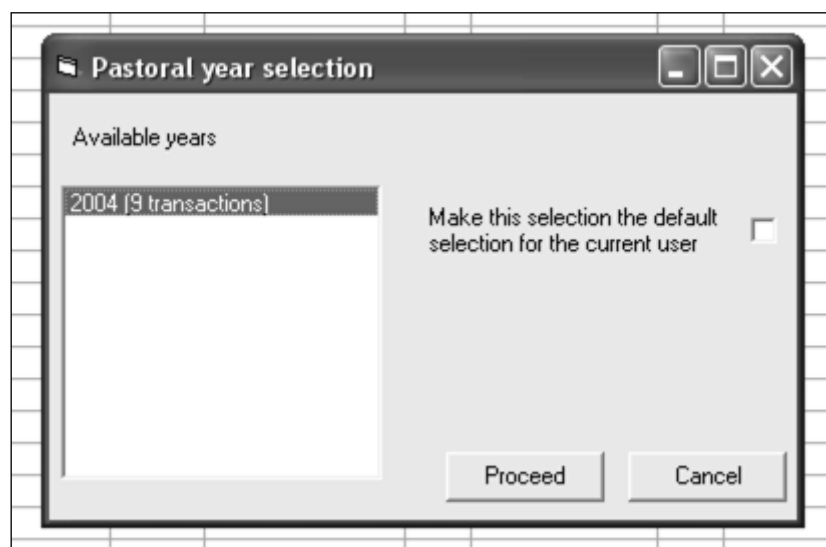
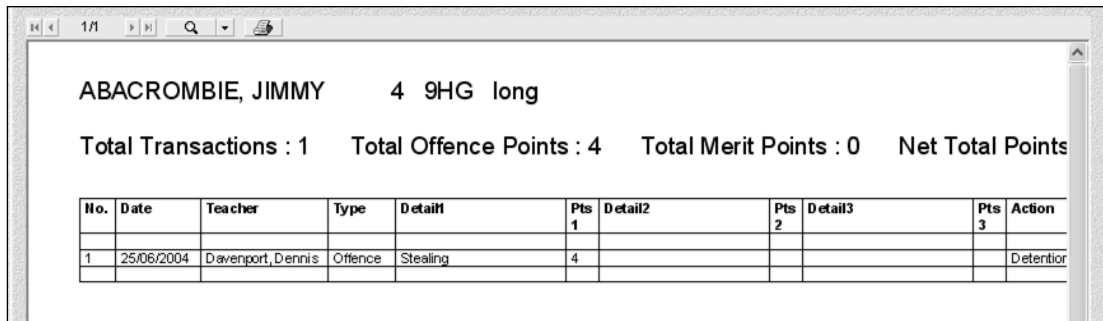


Figure 264: Selecting a different year

## *Print this student's transactions*

If you click the fourth button, the current student's transactions will be sent to the printer, with the preview being displayed, as shown below.



No.	Date	Teacher	Type	Detail	Pts 1	Detail2	Pts 2	Detail3	Pts 3	Action
1	25/06/2004	Davenport, Dennis	Offence	Stealing	4					Detention

Figure 265: Printing a student's transactions

Before moving on, there is the button in the bottom right hand corner of the transaction details screen.

You can either click Print document as you finish recording a transaction, or you can subsequently double-click on a transaction from the displayed list of transactions. The latter step will take you to the transaction details screen where you can edit the transaction and/or click on the button to print a document. When you do that you will move to the document printing screen, which follows.

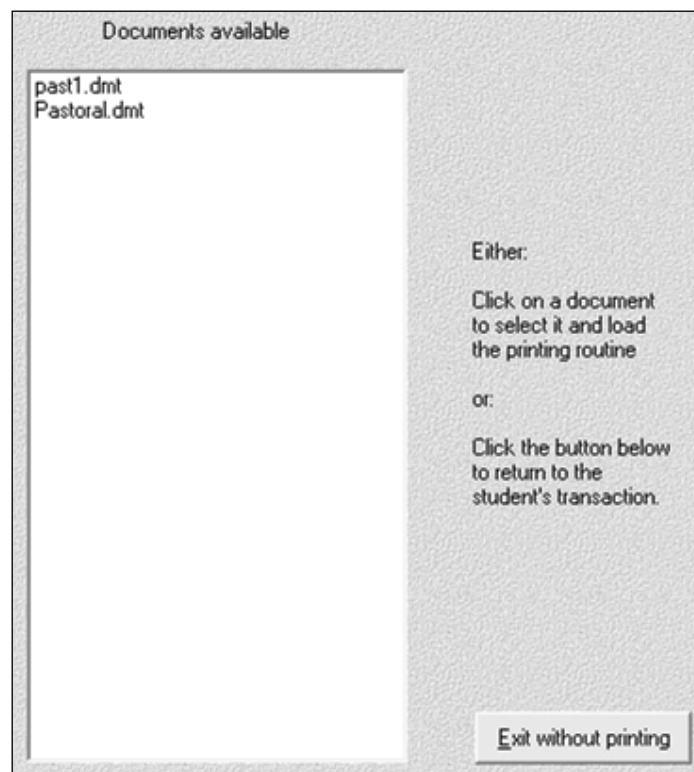


Figure 266: Selection of a pastoral document

Any documents designed for use with the pastoral utility will be displayed. (We shall deal with the design of these documents later in this chapter.) Select the document which you wish to print. If you have not saved the current transaction then the following message will allow you to do so.



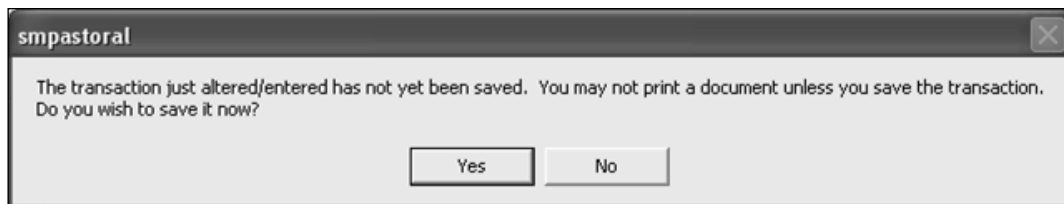


Figure 267: Saving the current transaction

Finally, you will arrive at the document preview screen, shown below.

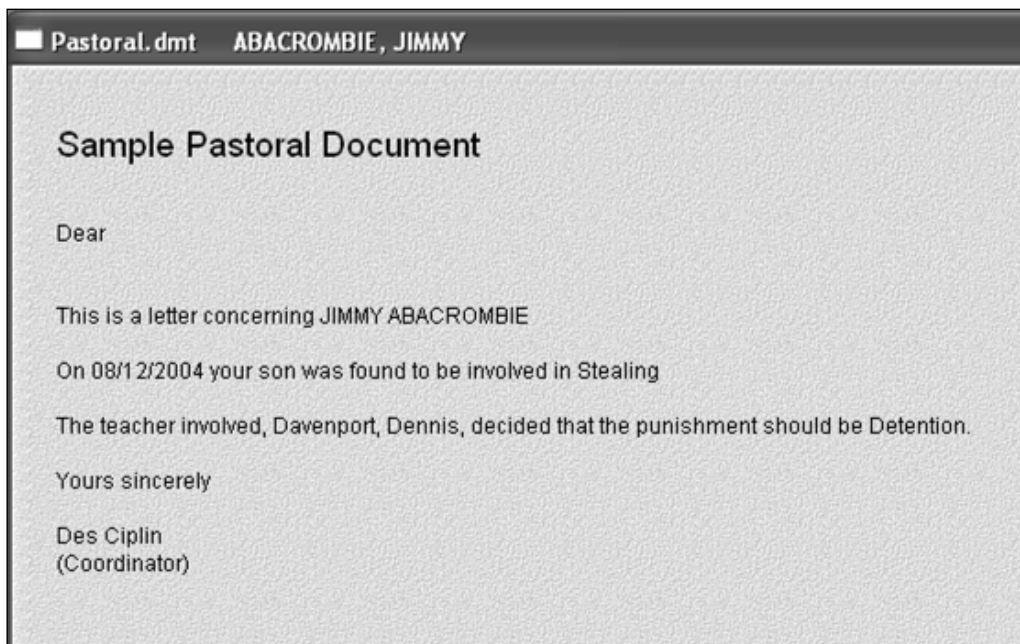


Figure 268: The document displayed

You may or may not be entirely happy with the document in its raw form. If you wish to edit it then click on the **text** area of the display and the word processor will appear, via which you may make additions and alterations to the document. These changes will NOT be saved back to the computer. They are casual changes which apply only to the current student. An example of an alteration follows.

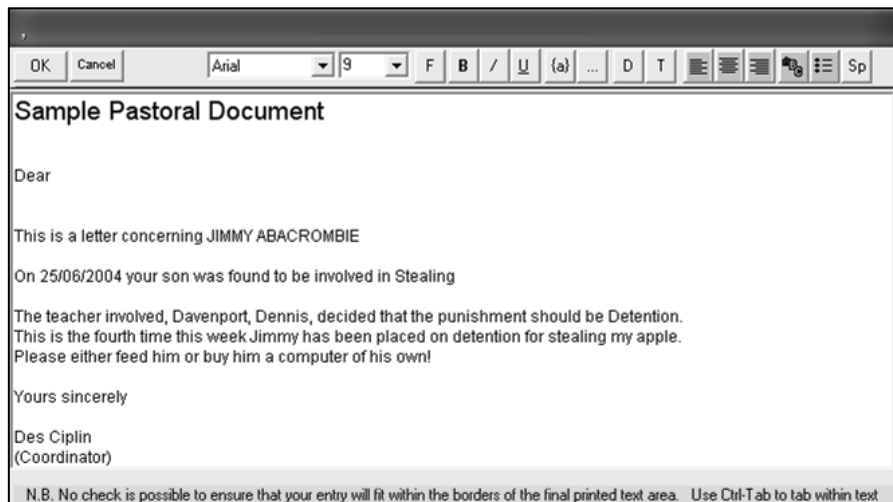


Figure 269: Editing the document

Once you have completed your alterations, click **OK** and the new version will be displayed, as shown below.

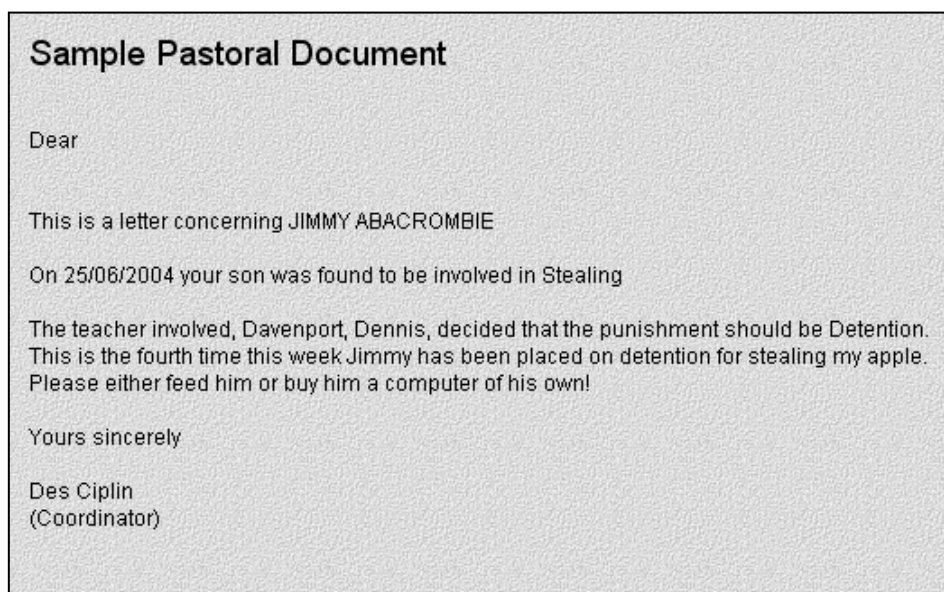


Figure 270: The edited document

Once you are satisfied you have a choice of two buttons at the top of the screen.



Figure 271: The top row buttons

If you wish to exit directly then select the second button.

If you click the first, **Printing options**, then you will move to a printing options window, shown over.

Pastoral printing options

You have the following option available for this letter

Print only

Print and file

Print, file and email to the following caregivers (please select)

Caregiver	eMail address	Send
Mr John ABACROMBIE	johna@paradise.net.nz	
Mrs June ABACROMBIE	junea@paradise.net.nz	

School email address

School email address  
e.g. smtp.xtra.co.nz

email message 

Please find attached a document relating to your {cm.gs("son")}, {cm.col(3)}.

To view this document you require Acrobat Reader, a free copy of which can be downloaded from

Figure 272: available Printing Options

You have three options, displayed in the top left of the screen.

You can:

- Print only
- Print and file
- Print, and email to the following caregivers (please select)

If you select the first then the document will be printed and you will be returned to the transaction screen. The following print dialogue will appear, via which print settings can be specified.

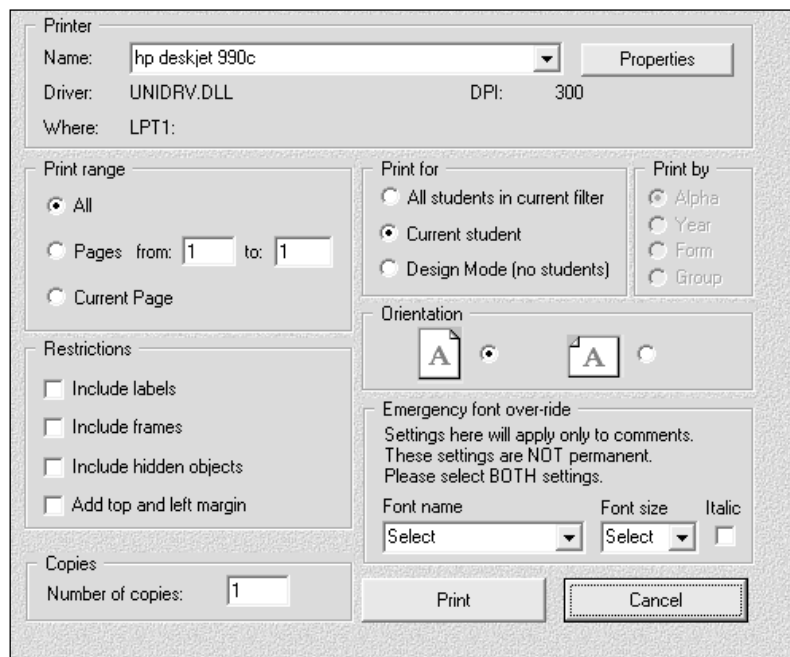


Figure 273: The Printer options

If you select the second printing option – to file the document - then it will be saved as a PDF file in the \cm\letters subdirectory. The file name begins with the student’s hidden ID and this is later used to identify documents belonging to a particular student. The directory, with three documents, is shown below.

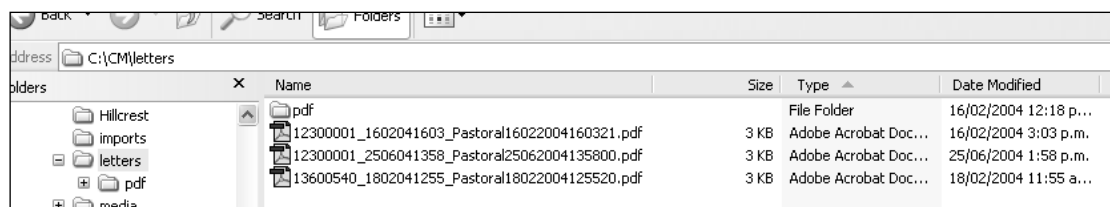


Figure 274: The document in the Letters subdirectory

If you wish to have the document printed, filed and emailed then:

- Select one or more of the caregivers listed. (Only those with email addresses will be offered.)
- Specify your school’s email address ie. the address from which the email is being sent – probably your own....
- Specify the school’s email service provider’s address. This will take the form of eg. smtp.paradise.net.nz Note that this address does NOT include a ‘@’ symbol. This and the sending address (item b above) will be stored and redisplayed for you next time you use this feature.
- Specify any covering message which you wish to form the basic message of the email.
- Click **Proceed**

The email will be sent and you will find a copy stored as a .PDF document in the relevant directory as shown above.

## 20.4 Quick entry of completed actions

This process is used to quickly set the **action completed** tick box for selected students and actions. The screen for this, somewhat reduced, is shown below.

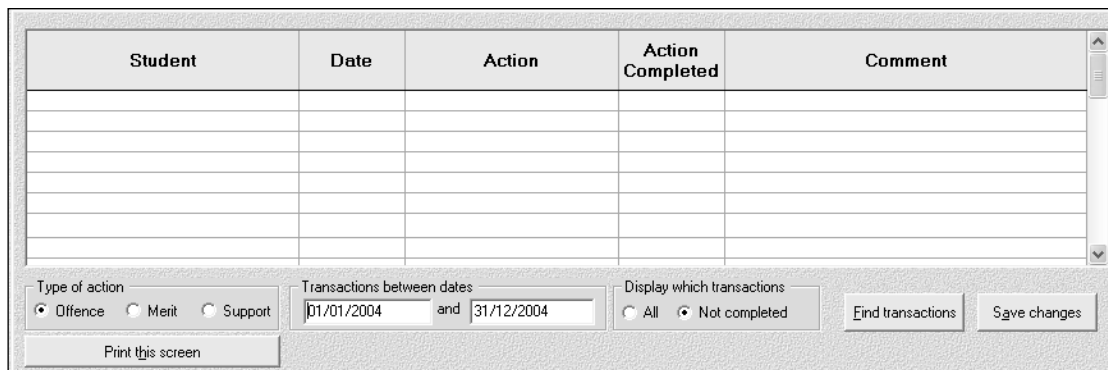


Figure 275: The Action Completed screen

The first step is to identify the action in which you are interested. Set the relevant transaction type, dates, and which transactions at the bottom of the screen, then click on the **Find transactions** button. This will display the screen shown below, via which you can select the action in which you are interested.

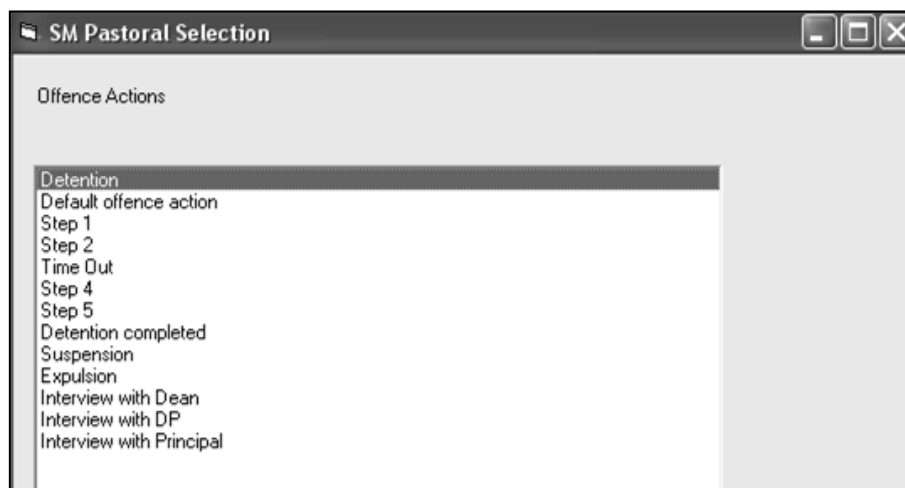


Figure 276: Selection of an action

Once selected, click **Proceed** and you will return to the previous screen with all of the matching transactions displayed. An example is shown below.

Student	Date	Action	Action Completed
ABACROMBIE, JIMMY	25/06/2004	Detention	No
ARNOLD, TRACEY	25/06/2004	Detention	No
BARRETT, MONIQUE	25/06/2004	Detention	No
BATCHELAR, SCOTT	25/06/2004	Detention	No
ROBINSON, BRENDON	25/06/2004	Detention	No
SINCLAIR, STEVIE	25/06/2004	Detention	No
SUTTON, BRENT	25/06/2004	Detention	No
TRETHEWEY, NICOLA	25/06/2004	Detention	No
WADE, CRAIG	25/06/2004	Detention	No

Figure 277: The identified Transactions

Now visit each of the **Action completed** entries on the right hand side of the screen. Double-click if a particular action has been completed, arriving eventually at a screen such as that shown below.

Student	Date	Action	Action Completed
ABACROMBIE, JIMMY	25/06/2004	Detention	Yes
ARNOLD, TRACEY	25/06/2004	Detention	Yes
BARRETT, MONIQUE	25/06/2004	Detention	No
BATCHELAR, SCOTT	25/06/2004	Detention	Yes
ROBINSON, BRENDON	25/06/2004	Detention	Yes
SINCLAIR, STEVIE	25/06/2004	Detention	No
SUTTON, BRENT	25/06/2004	Detention	Yes
TRETHEWEY, NICOLA	25/06/2004	Detention	Yes
WADE, CRAIG	25/06/2004	Detention	Yes

Figure 278: Some now completed

If all students have completed their detention then you may double-click the action completed column heading to toggle all of the entries.

Now click on the **Save changes** button and each of the actions in the selected transactions will have its status changed to completed. An example of this is shown below.

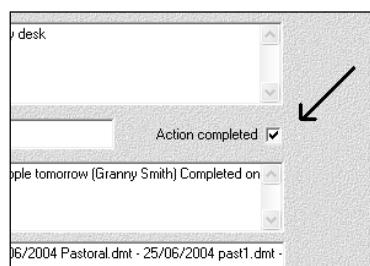


Figure 279: A completed action

## 20.5 Print Pastoral lists

There are several lists which you can print relating to pastoral transactions. Click 'Print Pastoral Lists' via the button above, which leads to the list printing screen below. Fields for time, location and possible motivation are scheduled to be added in early 2012.

### Pastoral Report Layout

The report includes date and time, selected report and points conditions are now printed in the footer of the report to aid interpretation at a later time.

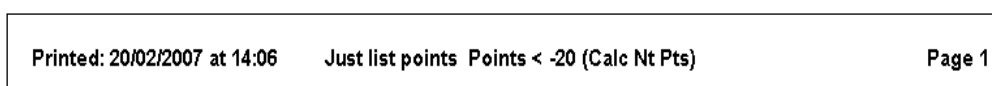


Figure 280: Report Footer

This footer is showing that the report run began at 2:06pm on 20/02/07. The report that was requested was **just points** and the criteria were points less than -20. It also prints a page number so that we can keep them in order.

Generally reports now have highlighting to facilitate easy recognition of logical breaks such as student names.

### The Pastoral Reports Screen

A screenshot of the "Pastoral List Options" screen. The screen is divided into several sections. On the left, under "Pastoral List Options", there is a list of options: "Just list points (SM Full only)" (highlighted), "Summarise transactions", "Provide full details", "Tabulate by teacher", "Tabulate by item/teacher", "Export transaction details", "Scan for referenced date", "Count actions by student", and "Actions by teacher + student details". Below this is a "Print by" section with radio buttons for "Full school" (selected), "Year level", "Form", and "Tutor". At the bottom left is a "Print List" button. On the right, under "List includes", there are checkboxes for "Offences" (checked), "Merits" (checked), and "Supports" (unchecked). Below these are checkboxes for "Ind. only specified offences", "Ind. only specified merits", "Include only specified supports", "Actions", and "Net pts / student". In the middle, there is a "List transactions between" section with date pickers for "01/01/2010" and "01/04/2010", and three buttons: "Just Today's Transactions", "Just This Year's Transactions (2010)", and "All Transactions in Database". At the bottom right, there is a "List just those with any transactions" section with a dropdown menu set to "any". Below that are checkboxes for "Show zeroes as blank spaces" (checked), "Use shading on report", "Show sections with no transactions", and "Separate students with blank line".

Figure 281: Pastoral Reports screen

You will notice the box providing options to customize the way the reports will print.



The tick box to show zeroes as spaces determines how the report displays numeric values that are zero – shows as a zero, but if ticked there is a less cluttered appearance replacing the zero with a space.

The tick box to print section prints a page for each reporting group that have no results end of the report. Conversely, if the tick is cleared it prints only the section's that have transactions.

### **Making selection criteria for your report:**

When designing your report you need to decide whether you wish to display offences, merits or supports. You can display any combination of these.

You would also need to decide which specific transactions you wish to see in the report. For instance you opt to display all **after school detentions**. You can refine this by setting a desired point's criterion such as greater than 15 points over the requested date range, or what ever your report requires.

If you do not tick the **incl specified offences** (for example) tick box for your chosen transaction, Student Manager will load all offences, merits and/or supports into your report.

You can refine your report still further by requesting transactions that have specific actions associated with them. As well as all offences for after school detention and greater than 15 points, we might want to limit our report to those students who had a letter sent home, for example. You can do this by ticking the box for associated **actions**. Bear in mind that a transaction must have an action associated with it to be printed if you tick the actions tick box.

You can select the order in which your report is printed by selecting the desired grouping from the **print by** panel on the centre left of the screen.

For any of the reports you can select the number of students in the report by setting the pastoral filter. You can access this using the button on the far left hand side of the screen. If you do not set the pastoral filter it will default to the main Student Manager filter in force at that time.

### **Just Points, summarise transactions and full details**

These reports have a large and flexible array of settings to choose from, so take it step by step. From early 2012 additional fields for Location, Time and Possible Motivation are added in data entry.

The reports print a list of students that have a specific number of points or transactions over a specified date range. The first step is to select offences, merits and/or supports as applicable.

The report will print results for each qualifying student.

The report qualifies a student for printing in this way: The pastoral records are searched for transactions in the chosen date range and they are added together to arrive at a total for offence points and merit points. These are separate totals. It is these totals that determine whether a student is printed or dropped from the report. A student is printed if **either** offences or merits satisfy the points criteria entered, however both results are printed for your information.



If you enter a points criterion of greater than 10 points for example, then, if either offence or merit total points are 11 or more, the student will be printed.

Further, if you opted to print both offences and merits, then if the offence points were 13, which would qualify the student for printing for our criteria of greater than 10 points, the offence total would be printed along with the merit points even if they are 10 or less points, for your information.

If you select net points per student you will be asked whether you want to calculate the report by net points. If you decide to this, the report will be calculated by using the net points. That is the offence points minus the merit points. If a student has 5 offence points and 20 merit points, the net points will be -15. The student is qualified for printing by the **net points** total.

You can also display the net points, but still calculate the report based on the offence and merit calculations outlined in the beginning of this section.

- You do this by selecting **NO** from the message box that will be displayed when you tick the Net Points tick box.
- If you click **YES**, the report will be calculated using net points. If you click **NO**, the report will be calculated as in at the beginning of this section, and net points will be displayed. If you click **CANCEL**, net points will be deselected and will not feature in report.

In addition, the **summarise transactions** report allows you to condense the print-out to give a minimum set of information for each transaction. This option displays the offence/merit description along with any associated actions.

#### **Tabulate by teacher**

The **tabulate by teacher** report allows you to list offences, merits and supports for each teacher.

A point to note is that you will also be required to enter the actions you want to see in your report.

#### **Tabulate by Item/Teacher**

The **tabulate by item/teacher** report lists each offence, merit and/or support for each teacher.

If you do not tick the **Print sections without transactions** tick box – as if there are no transactions for that section, for example merits, the whole section will be missing. Tick this box to show all section even if they have no transactions.

#### **Export Transactions**

This option exports your chosen settings to a comma delimited text file. The export screen also will display the file for you in Microsoft Excel, Microsoft Access or allow you to choose the program yourself. The selections for this option are the same as outlined above.

#### **Scan For Referenced Date**

The **scan for referenced date** is very similar to the **summarise transactions** report except that you request a specific date.

### Count Action By Student

The **count action by student** report lists each offence, merit or support and gives the total number of occurrences for that student over the date range selected.

### Action By Teacher

The **action by teacher** report is similar to the **action by student** report, excepting that you choose a specific teacher and the report will list all the occurrences of offences, merits or supports assigned by that teacher.

## 20.6 Pastoral utilities

From the main Student Manager menu, click 'Pastoral' for the main utilities shown below. Note the messages in red at the bottom of this screen. In any process which is global it is a good idea to have made a backup before running the process, just in case you either make a mistake or change your mind.

Figure 282: Global utilities

As with list printing, each of the possibilities has its own set of settings and these are made on the right hand side of the screen. Most use those displayed above for the first utility.

#### Balance all to zero points

This process creates a transaction for every student who has total net points other than zero, which balances out their net points back to zero.

#### Balance just those with less than default points

On the right hand side of the screen you can specify the default net points. This utility will generate a balancing transaction for those students whose net points are less than the total specified.

### Balance just those with no points since default date

On the right hand side of the screen you can also specify the default date. This utility will generate a balancing transaction for those students who have gained zero net points since the default date.

### Balance all points prior to the default date

This one is the same as the previous utility except that the created balancing transaction balances all points gained prior to the date specified.

### Global reduction by (up to) default points

This process will reduce every student's point by up to the default total specified. ie. if a total of 20 is specified then students with over twenty points will have their totals reduced by 20, and those with less than twenty points will have their totals reduced to zero.

### Global reduction by varying points

The screen for this process is shown below.

Default utility values

Default points: 1

Default date: 25/06/2004

Access transactions for Year:

Year: 2004

Changes made by: MUSAC MUSAC

Steps reduction chart

Please specify the step reductions which you wish to apply. Any student who currently has the points in the first column will have their total reduced to the number of points in the right hand column.

Reduce	To
1	1
2	1
3	1
4	2
5	2
6	2

Reduce higher points by: 0

Reduction details

Code: Vandalism

Applies to points between dates: 25/06/2004 and 25/06/2004

Figure 283: Global reduction by varying points

On the right hand side of the screen you can set the number of points you wish to have the students' totals reduced by for each of the possible totals.

### Global merit of default points

This utility allocates a merit transaction of the specified number of points to every student in the current filter.

The next three utilities relate to the deletion of transactions, and their titles are sufficiently self-explanatory as to require no further explanation.

### Delete all transactions prior to the default date

### Delete all transactions for those with zero net points

### Delete all transactions for leavers and deleters

Next are Chances reductions. This process was instituted by an intermediate school in Hawkes Bay. The students of the school can earn rewards (eg. Movie tickets) by gaining sufficient credits

within a certain time period – eg. each week.

#### Reduction check by default points (Chances)

This process allocates the nominated number of credit points to those who have not gained deficit points since the nominated date.



Figure 284: Reduction Check - Chances

The above illustrates the final approval process required before any of the utilities are actioned. Once you click the **Proceed** button, a small panel appears (as shown above) explaining what is about to happen and giving you a chance to change your mind.

#### Complex reduction by varying points (Chances)

This process is similar to the previous one except that the points credited are determined from the table completed on the right hand side of the screen. A similar table was illustrated in figure 38.

#### Reduction check by default percentage

The final utility in this area credits students by the number of points calculated by applying the specified percentage to their total (deficit) points.

The next utility is rather drastic.

#### Remove ALL transactions

This utility removes ALL transactions for all students in the current filter for ALL years. Note the message in red....

### Global change of action between two dates

The screen for this utility follows.

Balance all to zero points  
Balance just those with less than default points  
Balance just those with no points since default date  
Balance all points prior to the default date  
Global reduction by (up to) default points  
Global reduction by varying points  
Global merit of default points  
-----  
DELETE all transactions prior to the default date  
DELETE all transactions for those with zero net points  
DELETE transactions for leavers and deletes  
-----  
Reduction check by default points (Chances)  
Complex reduction by varying points (Chances)  
Reduction check by default percentage  
-----  
Remove ALL transactions!!!  
-----  
Global change of action between two dates

Default utility values  
Default points   
Default date

Global action change between 25/06/2004 and 25/06/2004  
From  to

From	To
Detention	Expulsion

Pause to approve each student individually

Global changes apply to  
Offences  Merits   
Applies between dates  and

Figure 285: Global change of actions

Using the two popups **From** and **To** you can specify an action and the action with which you wish it to be replaced. For the example, I've decided to expel every student who has ever had a detention....

You can apply the process to either offences or merits, and can also specify the dates between which the transactions must have occurred.

## 1.1 User-specific defaults

Click 'User Specific Defaults' to access the screen via which each user of the pastoral utility may specify preferences as follows.

**Pastoral User Specific Defaults**

**Display transactions in the order**  
 Earliest to latest  
 Latest to earliest  
Choose the order you wish the transactions to be displayed when viewing an individual student's transactions.

**Default transaction type**  
 Offence  
 Merit  
 Support  
Choose the default transaction type to be used when you are entering new transactions for an individual student.

**Name format for lists**  
 Students' full names  
 Students' preferred names  
 Full name (Preferred)  
Choose how you would like the students' names to appear on the Pastoral lists

**Sort the staff list**  
 Sort by Code  
 Sort by Name  
Choose which field you would like the staff list to be sorted on when entering new transactions

**Accumulate transactions/points**  
 Displayed years only  
 All years  
Choose how you would like the transactions and points accumulated, e.g. carried over across all years even though not all years are displayed

Save Defaults    Exit without saving

Figure 286: Pastoral User specific settings

There are five settings:

- 1 The order in which you prefer to have transactions displayed – Earliest to latest or Latest to earliest.
- 2 The default transaction type which you wish to appear each time you create a new transaction – offences, supports or merits.
- 3 The appearance of students' names in pastoral lists which you may print.
- 4 The order of sorting of staff members' names in the staff list which appears when detailing a transaction.
- 5 The accumulation of total points can be over all year or just displayed years. Your choice is signalled at the top of the resulting student display.

## 1.2 Pastoral configuration

'Pastoral Configuration' is where you can set up the various possibilities for each of the six areas shown listed on the left side of the following screen.



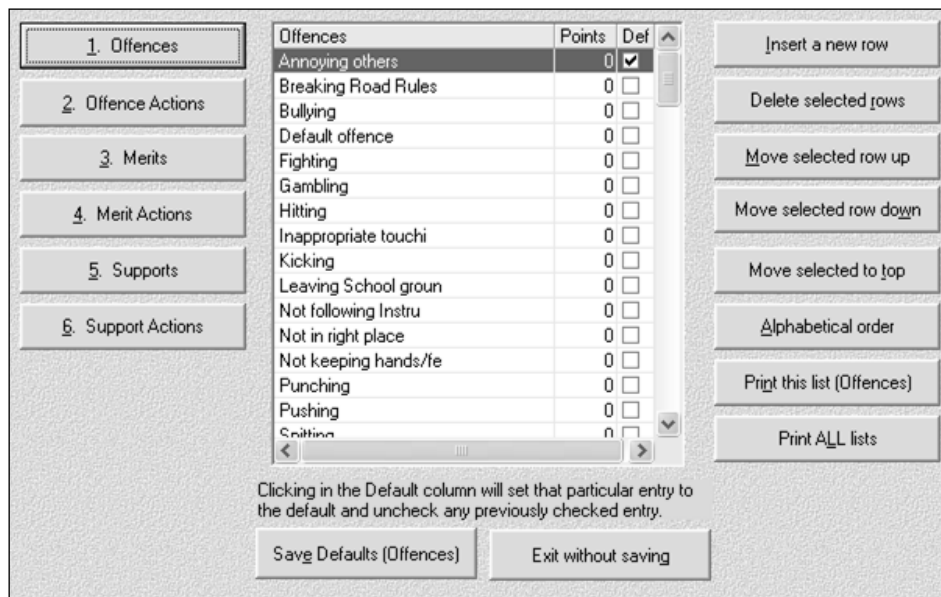


Figure 287: Pastoral offence possibilities

Above are the school's offence possibilities. Note that, on the right side of the list you can specify the default points for each offence and can also indicate which one of them you wish to have as the default entry. The buttons on the right of the list allow you to manipulate the rows and the display, and to print the various lists.

### 1.8 Pastoral document design

The 'Pastoral Document Design' button provides access to the process of designing pastoral documents. Click on the button and the following screen will be displayed, listing any existing documents.

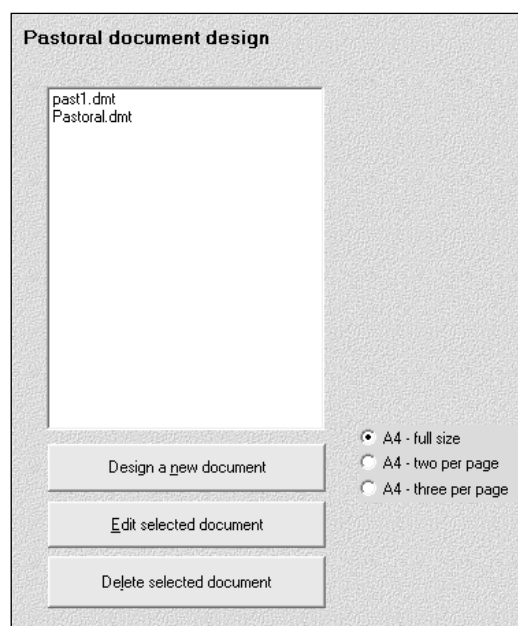


Figure 288: Selection of a document

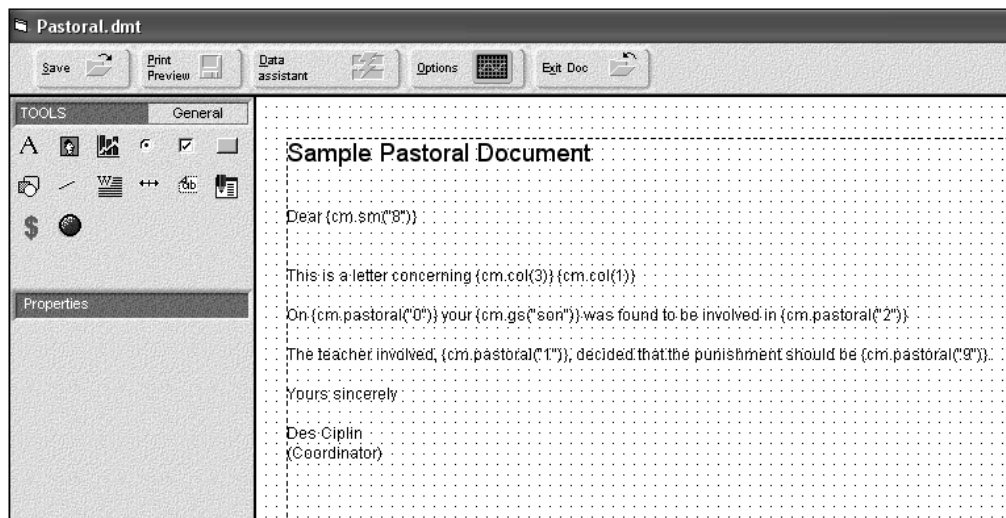


Figure 289: The document being edited

The three buttons allow you to design a new document, to edit the selected document, or to delete the selected document. For the purpose of this demonstration select the document which we have already seen, earlier here, and then click on the second button to edit this document.

Having clicked the **Edit** button, you will arrive in the pastoral document editing utility, shown above. The document consists of one large word processor object placed on the document. In normal use, you would probably have your school letterhead built into the design, using further word processors and perhaps a picture object for your school's logo.

Having dealt at some length with the process of designing documents earlier in this manual we shall review the basic features of the process.

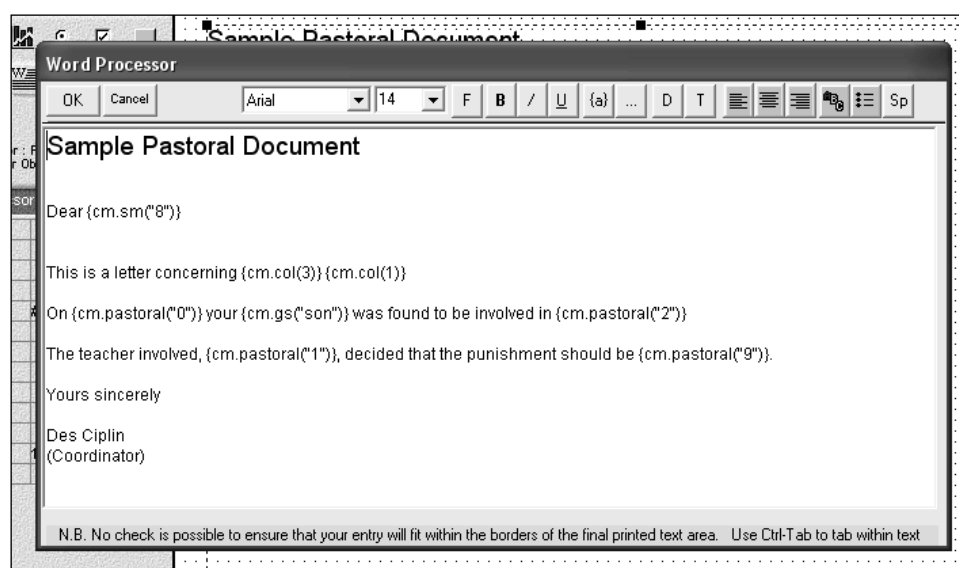


Figure 290: The contents of the word processor

Right-click on the word processor object and select the bottom option, which allows you to edit the



contents of the word processor, as shown below.

You can see that some use has been made of inserted codes. These have generally been selected from the insertion code tab related to pastoral transactions. This tab is shown below.

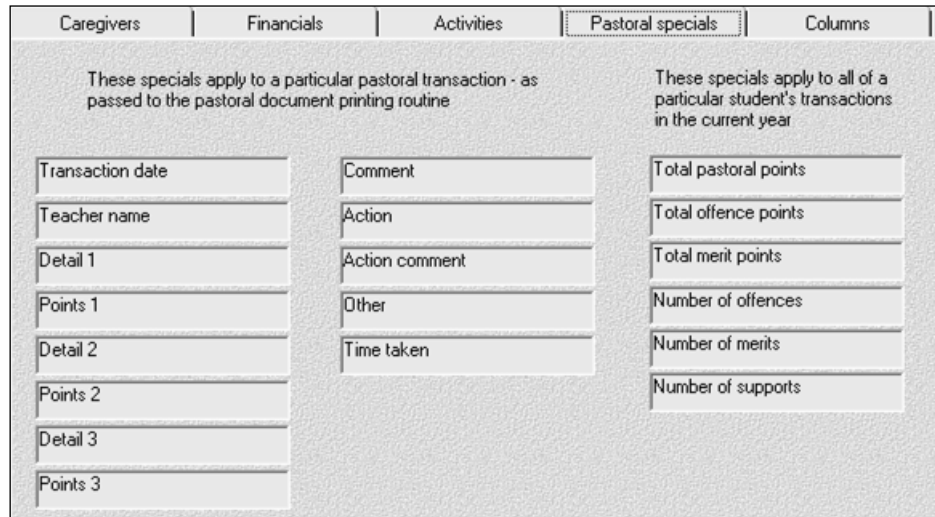


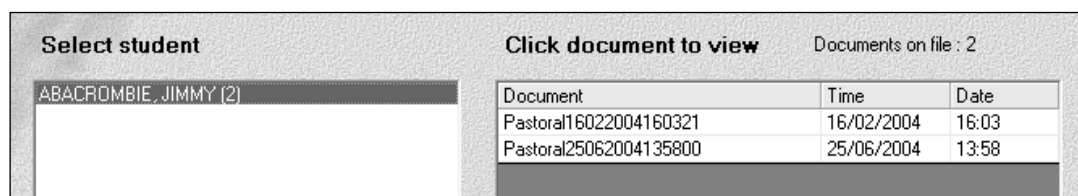
Figure 291: The pastoral code insertion possibilities

All of the pastoral transaction details which you might wish to include in such a document are available via this screen. There are others, too, which allow you to report on the student's total points in each of the various categories.

Once you have completed the design of your document, click on the **Save** button at the top of the screen and give it a suitable name – eg. 'Smokers letter'. It will subsequently be available for printing via the **Print a document** button on the transaction details screen for each student. Remember, if you wish to revisit a transaction to either edit it or to send a related letter then double-click on the transaction in question on the student's screen.

### Viewing previous pastoral letters

Clicking on 'View PDF-saved Letters' provides access to previously printed pastoral letters.



Document	Time	Date
Pastoral16022004160321	16:03	16/02/2004
Pastoral25062004135800	13:58	25/06/2004

Figure 292: A student with two letters

The screen displays each student for whom letters are found in the \cm\letters subdirectory, along with the number of letters available for each. When you click on a particular student, their individual letters are displayed on the right side of the screen. In the illustration below there is but one student, who has two letters.

To view a letter click on its name in the right hand list and it will be displayed, using Acrobat Reader, as shown below.

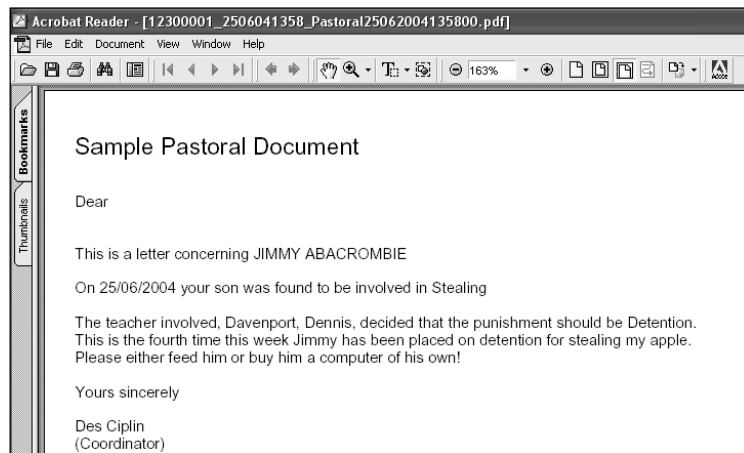


Figure 293: A letter in view mode

## 20.7 Personal Notes Files

From Configure Settings, the creation of a 'Notes' document differs from others in that a password is required to view the text thereon. These are also mentioned under screen documents earlier.

The first screen you will see doesn't contain too much, if you have no notes file(s).

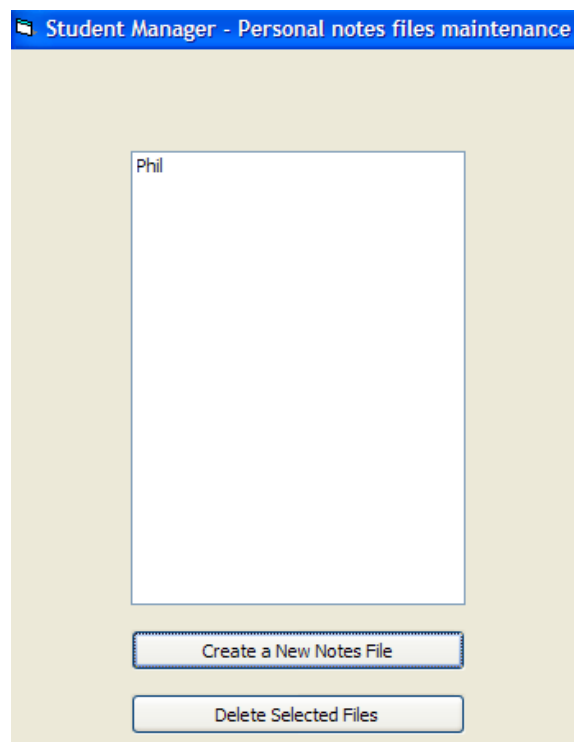


Figure 294: The existing files of notes

Click on the 'Create' button for the screen which follows.

**Personal Notes Creation**

**Step 1** Provide a short name for your notes file

**Step 2** Specify the password you will use to access these notes

**Step 3** Re-enter the same password for confirmation

**Step 4**

Upon creation, a new column will be created to hold your notes, and a document will be created under the same name as your notes file and this document will be added to your document selection.

Figure 295: Creation of a further notes file

You can specify the name of the document and the password which you wish to use to access it, twice. Clicking 'Proceed' will create the document for YOUR use.

## 21 Ministry of Education Returns

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### What's in this chapter?

- 25.1 An overview of MOE returns
- 25.2 Validation of the school's MOE data
- 25.3 Generating the MOE data file
- 25.4 Printing the MOE returns
- 25.5 Printing audit lists
- 25.6 Reviewing subject codes
- 25.7 Reviewing subject codes

### 21.1 An overview of MOE returns

**Note:** The MoE makes annual changes to this part of Student Manager, so please refer to the Ministry's website for the latest changes and Roll Returns guide for completing your Returns.

The purpose of this utility is to generate the file of returns data, suitably validated, which, when forwarded to the Ministry, will enable them to correctly process each school's data for the purposes of their roll returns.

It is essential that the data being sent to the Ministry is valid. It is far easier from the school's viewpoint to have the data checked as it is entered, and Student Manager goes to considerable efforts to ensure that data recorded on students is both valid and sensible.

The process of generating the returns file goes even further and checks every item of data against the Ministry's specifications to ensure that only accurate data is supplied to them. Indeed, the file cannot be generated until all data is found to be accurate.

The MOE Returns button from the main menu leads to the following screen.

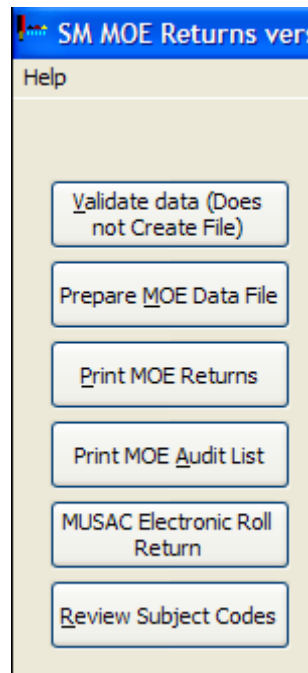


Figure 296: The Ministry of Education returns buttons

These buttons allow you to validate your data, to generate the file, to print both the returns and the audit lists of students, and to review the subject codes used by your school.

The first process, data validation, may be used at any time of the year to have your data checked for valid entries.

The generation of the returns is a two-step process. The first step is to use the second button to prepare the returns (data file) and this step includes re-validation of your data. The second step is to print the returns, either via a button at the bottom of the second step, or via the 'Print MOE returns' button above.

The preparation of the returns process will NOT create the .moe file unless all of the data has passed validation. This prevents a school from submitting a file containing invalid data.

## 21.2 Validation of the school's MOE data

The process behind the first two buttons is virtually identical. The first leads to the validation of the data required for the file, and the second follows the same process to generate the file. This step is simply a 'Health check' for your data prior to generating the returns. It will NOT generate the file required for printing the returns. The file can only be generated via the second button – the preparation of the MOE returns.

If you click on either of the first two buttons then an immediate check is made of the school's subject codes. (These will not exist for primary or special schools and will therefore be found to be fault free!)

If invalid entries are found then the following message appears.

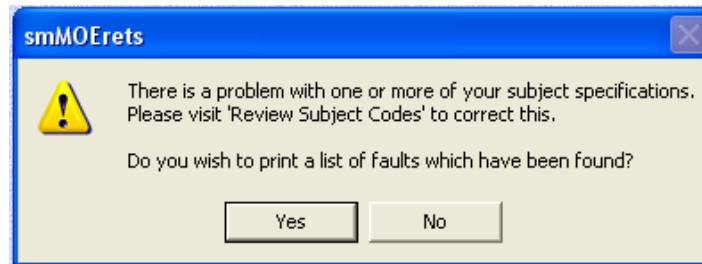


Figure 297: Faults are found in the subject codes area

This allows you to first preview then, if required, to print the list of faults found. An example of such a list is shown below.

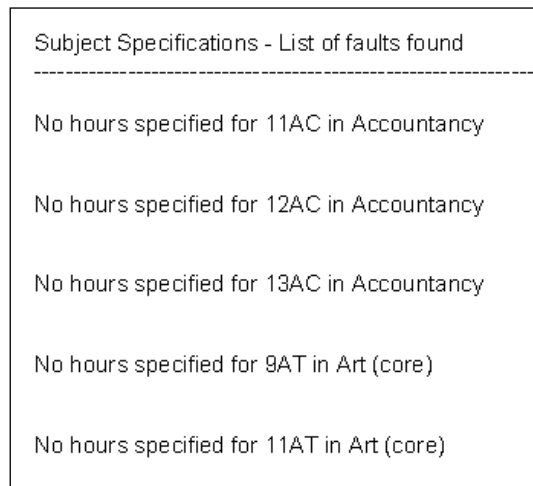


Figure 298: Faults list found in subject codes

The topic of subject codes is further dealt with in this section.

At this point secondary schools will be asked to indicate how many weeks each of their option sets run for in the current year. Remember that, when specifying the hours for each option, you were required to indicate how many hours each option would take if the option set were to last all year. The following screen accepts the information which it then uses to calculate the number of hours actually offered in each subject.

**Which option sets are you running this year?**

Option sets being used in 2004 :	No. of weeks active:
2004 First half	20
2004 second half year	18

In order to calculate the number of hours per year each student takes a particular subject we need to know which option sets are being used during the year and how many weeks each set is running for.

Save and continue

Continue

Figure 299: How many weeks does each option set occupy?

Proceeding, you will arrive at the screen for the selected process but, as shown below, the button which carries out the process will be disabled, until you have corrected the faults found in the subject codes.



Figure 300: The disabled button on the generation screen

The above check does apply only to secondary schools. Let's turn our attention to a primary school and detail the process of data validation.

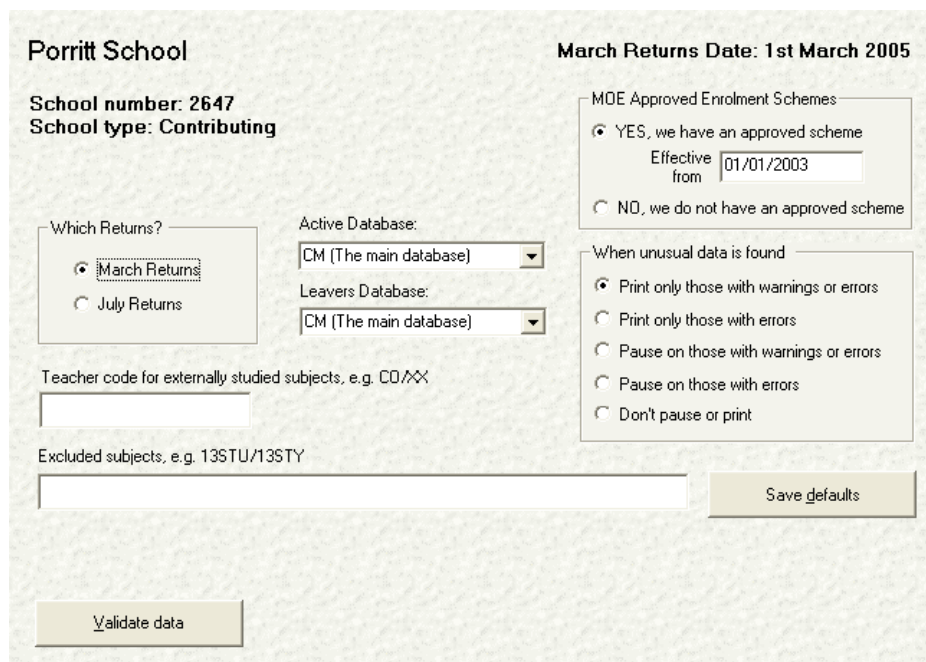


Figure 301: The data validation screen

On the screen above, you can see that :

- 1 The March returns have been selected
- 2 The school DOES have an approved enrolment scheme
- 3 The process has been asked to pause on warnings or errors.

Please note: the printing process does allow you to preview the resulting document prior to optionally printing it.

- 4 Being a primary school, there are no teacher codes for externally provided subjects and no excluded subjects.
- 5 The 'Validate data' button is enabled, allowing you to proceed.

Click on the 'Validate data' button and the data for your students will be scanned. There are two types of faults which will be identified – Warnings and Errors.

Wherever possible, if the fault is a warning, then the data will be modified for the returns file to provide valid information. The database itself is NOT changed.

Errors cannot be modified automatically. They will require correction before the returns can be completed and, in the meantime, they will prevent the generation of the file and the printing of the tables.

An example of a warning follows.

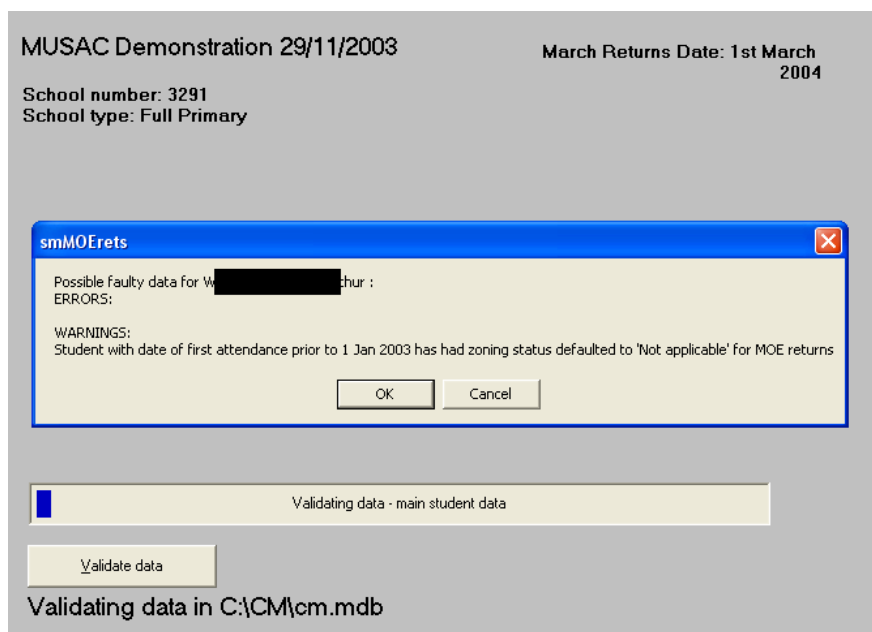


Figure 302: A warning has been found

This student had an invalid zoning status (for students with a date of first attendance at school prior to Jan 1, 2003, and the program has returned 'Not applicable' for this student for the returns file. The database will still contain the original data.

At the end of the validation process the following message appears indicating that one critical error was found and 11 warnings were automatically adjusted to valid data.



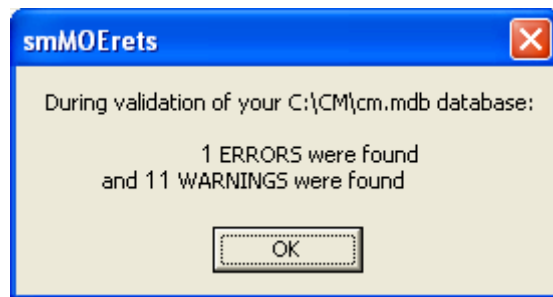


Figure 303: The error notification message

Errors were found during the creation of the MOE file. You may not print the tables but must correct the data and re-prepare the file.

Figure 304: The screen reflects the error warning

The screen at the end of the process confirms that you cannot proceed until all critical errors have been repaired.

In order to identify the errors you should choose the option 'Print only those with errors' on the validation screen. Having done that, a preview such as that shown below will be displayed.

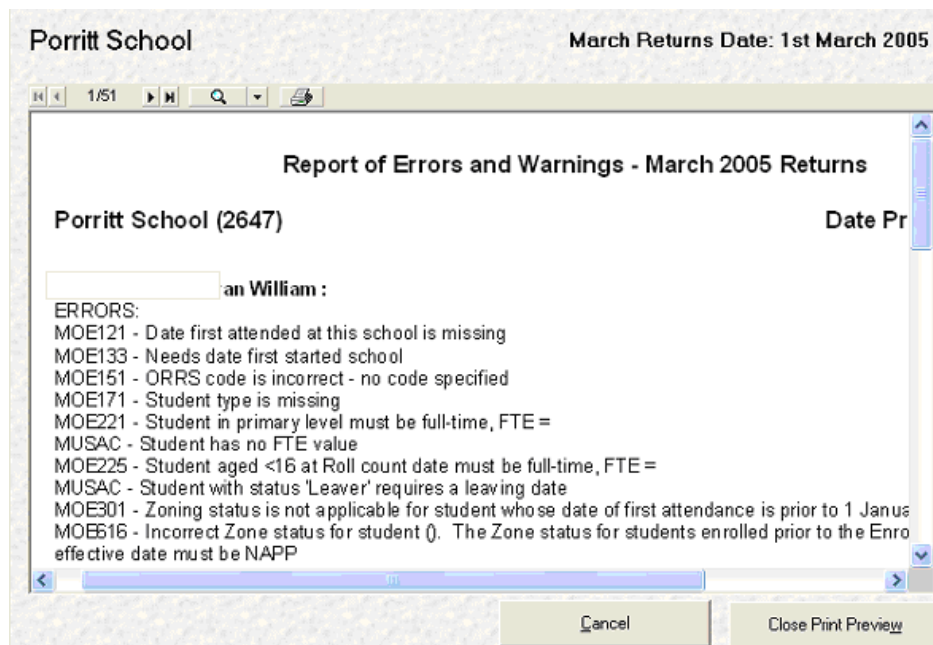
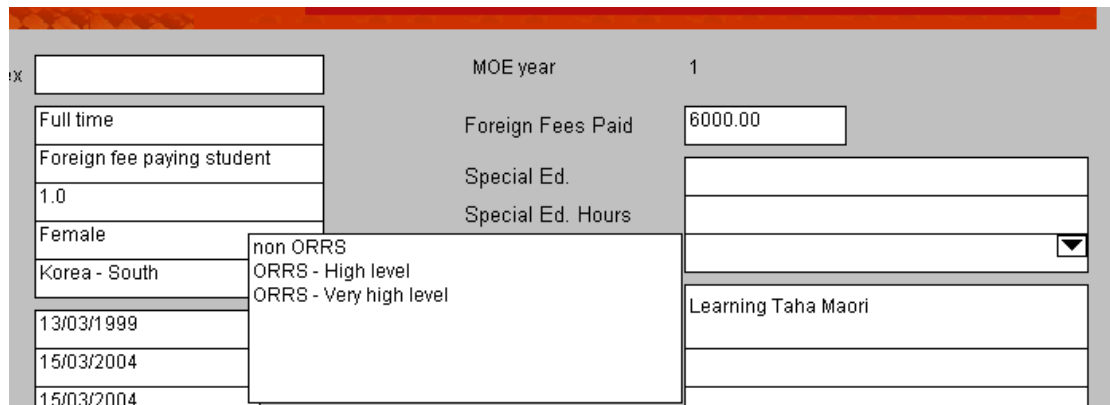


Figure 305: The previewed list of critical errors

Now it is possible to return to the relevant student(s) data screens to enter correct data. The illustration below shows the repair of the fault found, via the student's MOE data screen.



The screenshot shows a student data entry form. On the left, there are several input fields: a text box, 'Full time', 'Foreign fee paying student', '1.0', 'Female', 'Korea - South', '13/03/1999', '15/03/2004', and '15/03/2004'. On the right, there are fields for 'MOE year' (value: 1), 'Foreign Fees Paid' (value: 6000.00), 'Special Ed.', 'Special Ed. Hours', a dropdown menu for ORRS levels (options: non ORRS, ORRS - High level, ORRS - Very high level), and 'Learning Taha Maori'. A dropdown menu is also visible for 'Learning Taha Maori' with the value 'Learning Taha Maori'.

Figure 306: Repairing the error on the student's data screen

Once you have attended to any errors and rerun the validation process, you should receive the following message, giving you the 'All clear' to proceed to the generation of the data file.

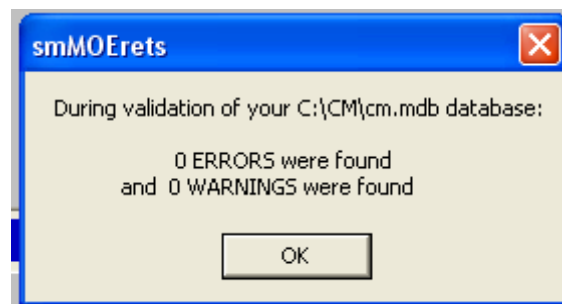
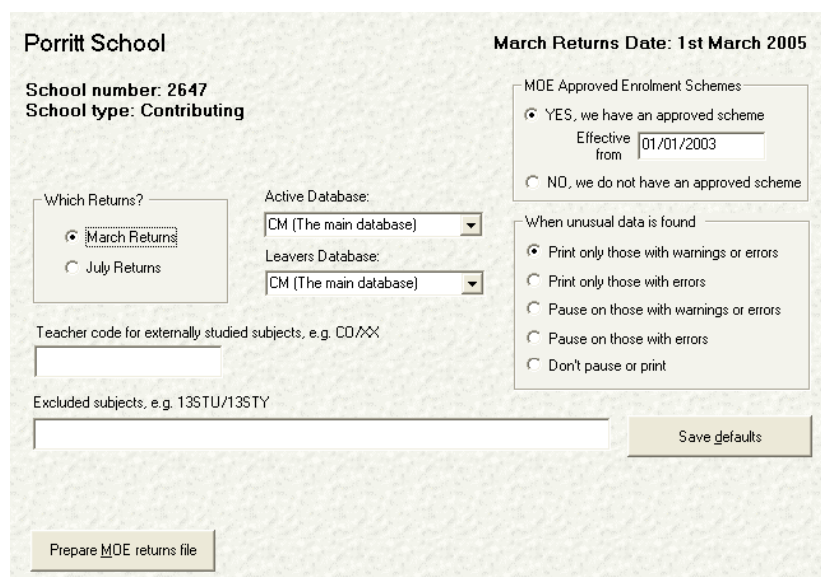


Figure 307: The data is validated

### 21.3 Prepare the MOE data file

Click 'Prepare MoE Data File' for a similar screen to the data validation screen. An example of this screen is shown below.



The screenshot shows the 'Prepare MoE returns file' screen for 'Porritt School'. The 'March Returns Date' is set to '1st March 2005'. The 'School number' is '2647' and the 'School type' is 'Contributing'. There are two radio buttons for 'Which Returns?': 'March Returns' (selected) and 'July Returns'. There are two dropdown menus for 'Active Database' and 'Leavers Database', both set to 'CM (The main database)'. There is a text box for 'Teacher code for externally studied subjects, e.g. CO/XX'. There is a text box for 'Excluded subjects, e.g. 13STU/13STY'. There are two sections of radio buttons: 'MOE Approved Enrolment Schemes' (with 'YES, we have an approved scheme' selected and 'Effective from' set to '01/01/2003') and 'When unusual data is found' (with 'Print only those with warnings or errors' selected). There is a 'Save defaults' button and a 'Prepare MOE returns file' button at the bottom.

Illustration 13 : The file generation screen

This screen will display the same settings that you used in the data validation step, particularly if you had clicked on the button on the right side of the screen to 'Save defaults'. This causes your settings to be memorised and returned the next time you enter the program.

Naturally, having completed the validation step successfully, you should now click the button to 'Prepare MOE returns file', and subsequently achieve the following message.

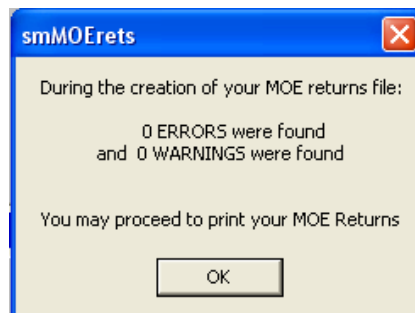


Illustration 14 : The file has been created successful

If no errors have been found then the screen (shown below) indicates the name and location of the returns file.

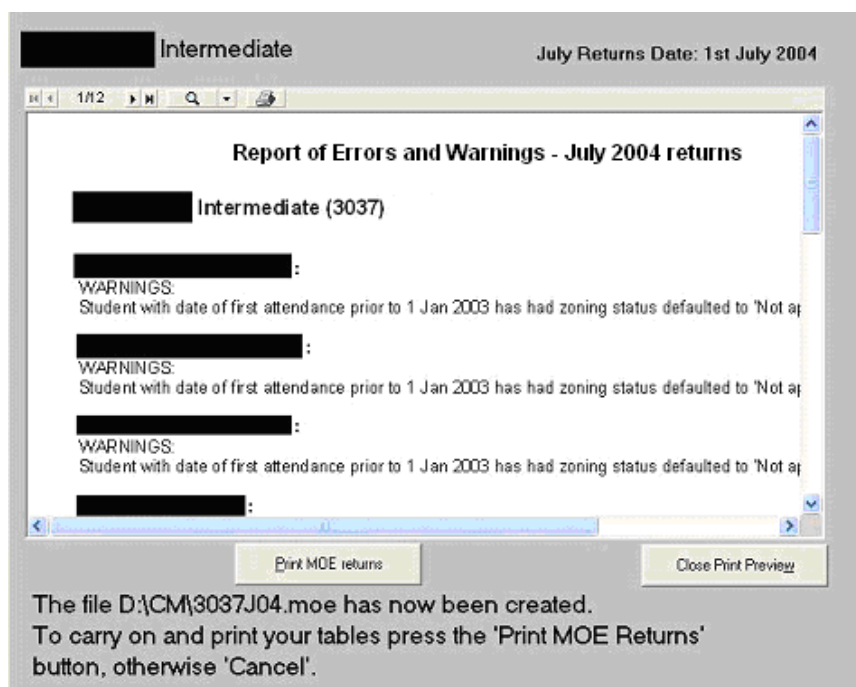


Illustration 15 : The file has been created

Now you can proceed to the printing phase either by clicking on the 'Print MOE returns' button which appears under the print preview box (as shown above) or by clicking on the following button.

## 21.4 Printing the MOE returns

The screen for the returns printing process is shown below.

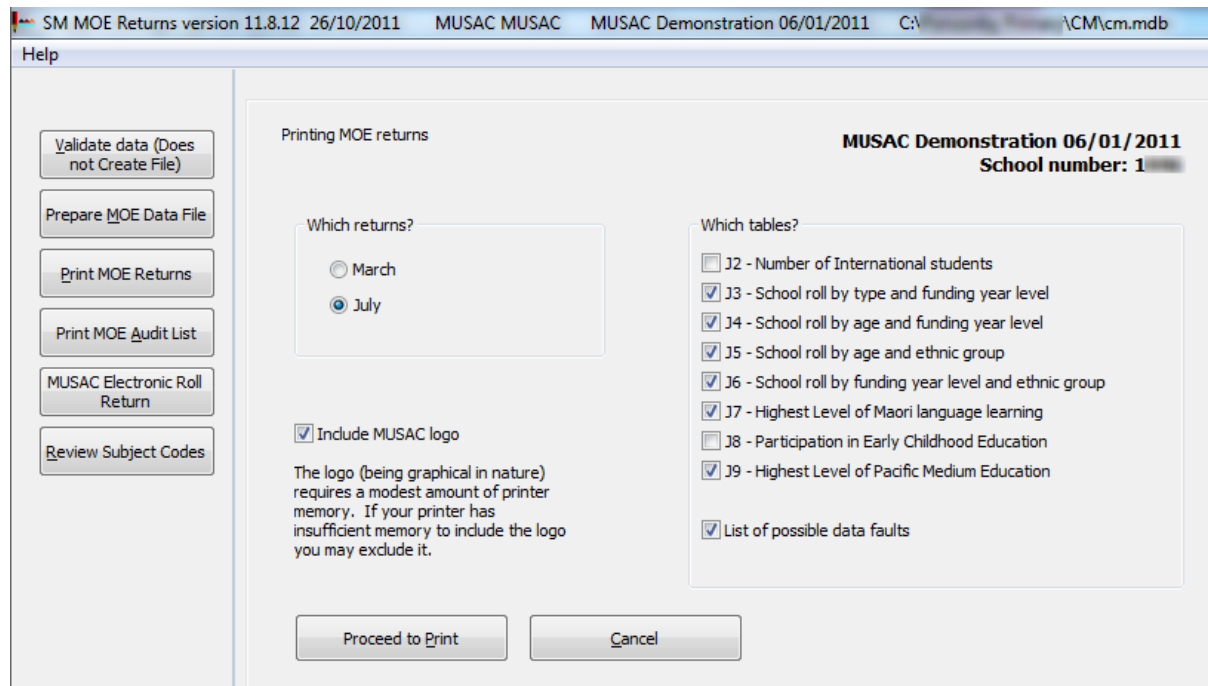


Illustration 16 : The MOE returns printing screen – March returns – Primary school

The screen above lists the tables relevant to the March returns for a primary school. You can select the tables which you wish to have printed from the display list on the right of the screen.

The equivalent screen for the July returns, again listing the relevant tables, is shown below.

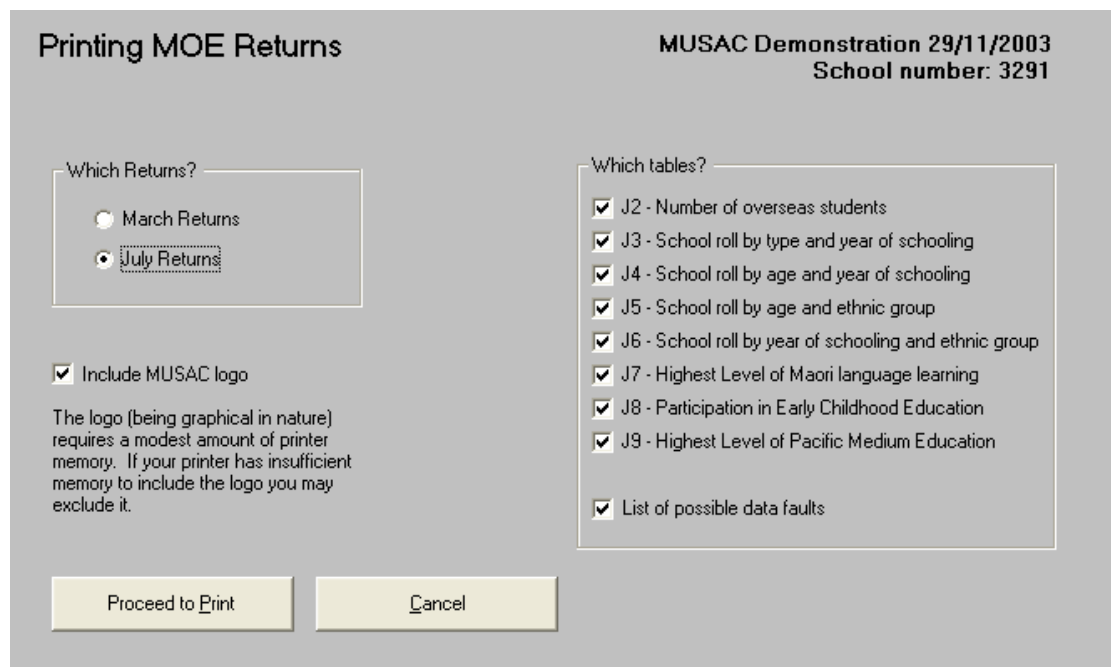


Illustration 17 : The July Returns tables – primary school

The equivalent screen for secondary schools differs according to school type, offering the relevant sets for selection of tables.

Once you click 'Proceed' to have the returns printed you will be offered the option to have the Horizontal or Vertical group (Room / Whanau / Tutor group) lists printed at the same time. The following section deals with the separate printing of these lists, but the Ministry of Education require that they be printed at the time of the returns. These must then be signed by the teacher responsible for each group and held on file. The following illustration displays the horizontal / vertical group choice.

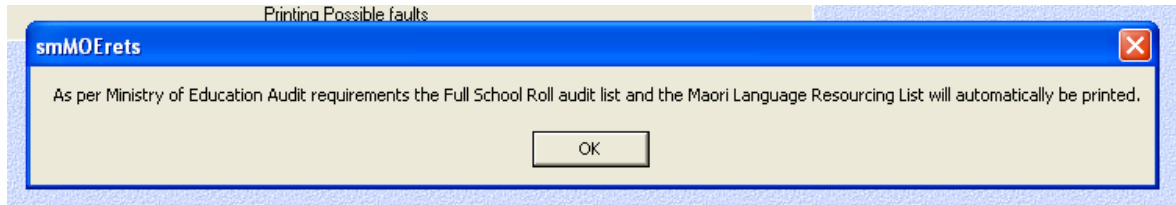


Illustration 19 : The information message concerning the printing of audit lists

Subsequently, the following message appears which gives you the option to generate the list in either horizontal or vertical groupings.

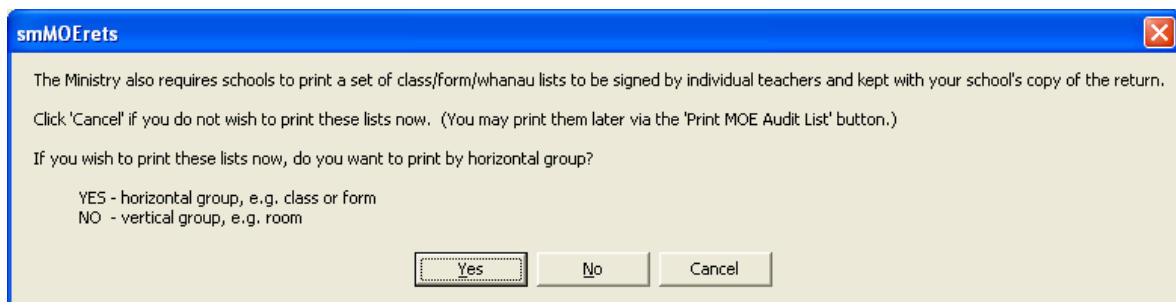


Illustration 20 : The two options for the generation of the lists

The printing process will take place and the tables generated and displayed in preview mode. Two examples of table are shown below.

At various places in this chapter black rectangles have been used to hide information which identifies the school whose data has been used for the examples.

**1 March**  
**Number of Overseas Students** **Date 26/06/2004**

**Table M2**  
Schoo Number: [REDACTED]  
School Name: MUSAC Demonstration 29/1/2003

	Name (for audit purposes only)	Gender (M or F)	Date of Birth	Country of Citizenship	Type of Student	Date of Enrolment	Year of Schooling	Total tuition fees charged for this year in \$NZ incl GST
	Total Exchange Students				0			
	Total NZAID Scholarship Students							
1	[REDACTED]	F	10/10/1997	KOR	FF	10/11/2003	1	6000.00
2	[REDACTED]	M	15/08/1998	KOR	FF	08/09/2003	1	3000.00
3	[REDACTED]	F	03/12/1996	KOR	FF	28/01/2004	3	6000.00
4	[REDACTED]	F	03/08/1996	KOR	FF	08/10/2003	3	6000.00
5	[REDACTED]	F	13/07/1995	IDN	FF	28/01/2004	4	3000.00
6	[REDACTED]	F	05/05/1996	KOR	FF	21/07/2003	4	3000.00
7	[REDACTED]	M	01/07/1996	KOR	FF	28/08/2003	4	6000.00
8	[REDACTED]	M	11/06/1996	KOR	FF	04/12/2003	4	6000.00
9	[REDACTED]	F	21/01/1994	KOR	FF	28/08/2003	6	6000.00
10	[REDACTED]	M	12/03/1994	KOR	FF	28/01/2004	6	6000.00
11	[REDACTED]	F	19/02/1993	KOR	FF	04/12/2003	7	6000.00
12	[REDACTED]	F	08/11/1993	KOR	FF	06/10/2003	7	6000.00
	Foreign Fee Paying Students				12			
	GRAND TOTAL				12			

The total number of FE student is must agree with the totals in Table M2 column 7  
The total number of FF students must agree with the totals in Table M2 column 8

Type of Overseas Student:  
EX - Foreign Exchange Student  
FE - NZAID (Formerly MFAT) Scholarship Student  
FF - Foreign Fee Paying Student

Illustration 21 : An example of a printed returns table

**1 July (Headcount)**

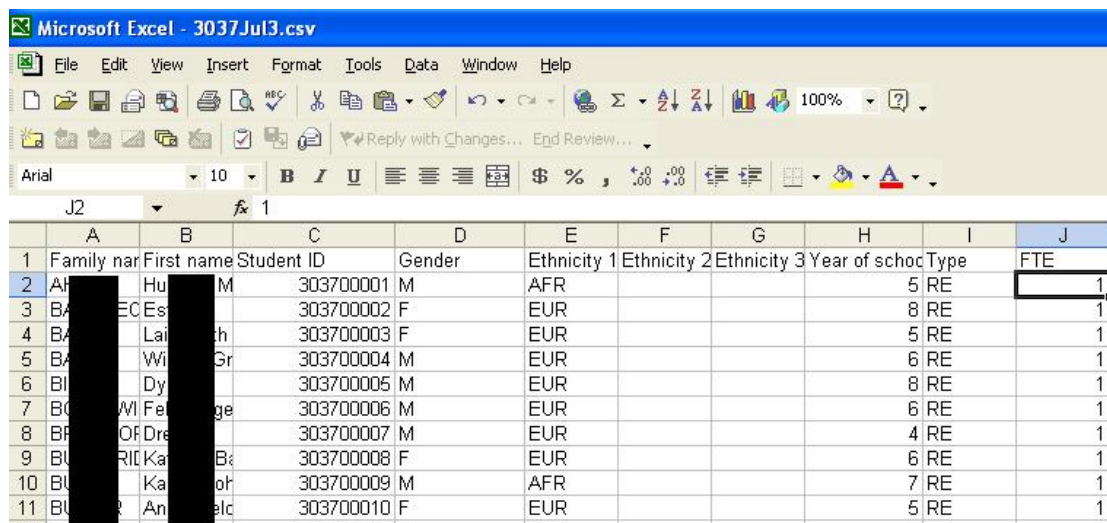
**Table J3 School Roll by Type of Student and Year of Schooling** Date 05/07/2004

School Number: 3037  
School Name: Heretaunga Intermediate

Type of Student Year of Schooling	Students Eligible for Ministry Funding								Other Students								Total No. of Students			
	1		2		3		4		5		6		7		8					
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	TOTAL	
Year 1	11	13							11	13								11	13	24
Year 2	14	7							14	7								14	7	21
Year 3	12	20							12	20								12	20	32
Year 4	14	7							14	7								14	7	21
Year 5	14	12							14	12						1		14	13	27
Year 6	17	9							17	9								17	9	26
Year 7	13	8							13	8								13	8	21
Year 8	8	12							8	12								8	12	20
Year 9																				
Year 10																				
Year 11																				
Year 12																				
Year 13																				
Year 14																				
Year 15																				
<b>TOTAL ROLL</b>	103	88							103	88				**	**	*	1*	103	89	192

Illustration 22 : A second example of a returns table

At the bottom of the screen above, as with every table previewed, there is a button which enables you to have the relevant data forwarded to Excel. The screen below displays the data from the table above, as it arrives in Excel.



Microsoft Excel - 3037Jul3.csv

	A	B	C	D	E	F	G	H	I	J
1	Family name	First name	Student ID	Gender	Ethnicity 1	Ethnicity 2	Ethnicity 3	Year of school	Type	FTE
2	BA	Hu	303700001	M	AFR			5	RE	1
3	BA	EC	303700002	F	EUR			8	RE	1
4	BA	Lai	303700003	F	EUR			5	RE	1
5	BA	Wili	303700004	M	EUR			6	RE	1
6	BA	Dy	303700005	M	EUR			8	RE	1
7	BA	Wi	303700006	M	EUR			6	RE	1
8	BA	OF	303700007	M	EUR			4	RE	1
9	BA	RIC	303700008	F	EUR			6	RE	1
10	BA	Ka	303700009	M	AFR			7	RE	1
11	BA	An	303700010	F	EUR			5	RE	1

Illustration 23 : An example of the table data in Excel

The following is a list of the data fields included in each of the generated csv files. These make the process of identifying the source of any discrepancies in numbers in tables particularly easy for schools. If required at a later date the files can be found in the \cm folder and identified by the school number, the month of the returns and the table number e.g. 123Mar3.csv. These tables can, of course, be accessed directly from within the package via the 'Excel' button on each table's page, as shown above.

Student Manager .csv files for Tables include:

- MARCH 3 – School Roll by Type of Student and Year of Schooling

Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, FTE

- MARCH 4 – Highest Level of Maori Language Learning  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, MLLI
- MARCH 5 – Previous School  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, Previous School
- MARCH 6 – Zoning Status  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, Zoning, Date of enrolment
- MARCH SL1 – School Leavers by Highest Attainment and Ethnic Group  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Reported Ethnic Group, Year of schooling, Type, Attainment
- MARCH SL2 – School Leavers by Year of Schooling and Ethnic Group  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Reported Ethnic Group, Year of schooling, Type
- JULY 3 – School Roll by Type of Student and Year of Schooling  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, FTE
- JULY 4 – School Roll by Age and Year of Schooling  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, Date of Birth
- JULY 5 – School Roll by Age and Ethnic Group  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Reported Ethnic Group, Year of schooling, Type, Date of Birth
- JULY 6 – School Roll by Year of Schooling and Ethnic Group  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Reported Ethnic Group, Year of schooling, Type
- JULY 7 – Highest Level of Maori Language Learning  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, MLLI
- JULY 8 – Participation in ECE  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Reported Ethnic Group, Year of schooling, Type, ECE
- JULY 9 – Highest Level of Pacific Medium Education  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, Pacific Language, Level
- JULY 10 – Subjects >= 20 hours per year  
Family name, First names, Student ID, Gender, Ethnicity 1, Ethnicity 2, Ethnicity 3, Year of schooling, Type, Subjects 1 to 15 (Subject, Mode of Instruction, Hours per year, Learning Zone)



## 21.5 Printing the audit lists



At the same time as you print your Ministry of Education returns your class/group lists will be printed as audit lists, and you must have them signed by the teachers responsible for each group. However, you may repeat the process at any time of the year to generate an audit list of your school.

**Note:** The words 'horizontal' and 'vertical' will appear in the options with the user-configurable group titles in brackets, so if the school has configured the Horizontal group title to be "HCIs" and the Vertical group title to be "Class" then the following will be displayed:

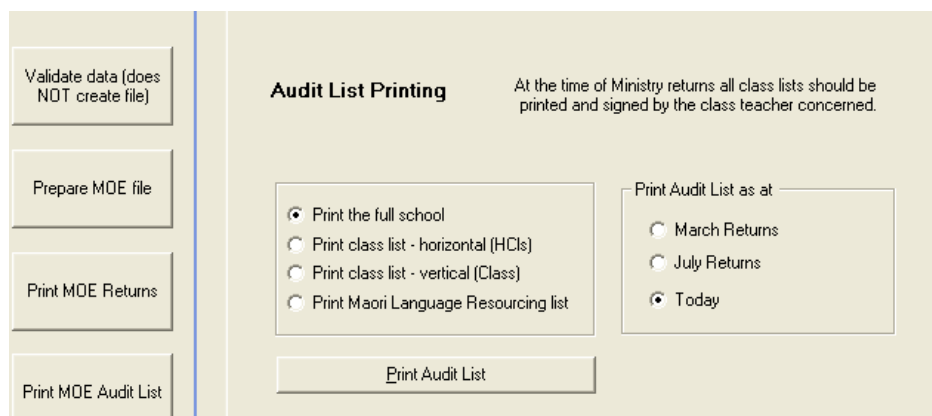


Illustration 24 : The audit list printing screen – a possible secondary school appearance

A Secondary school would therefore click the "Print class list – horizontal (HCIs)" and a Primary school the "Print class list – vertical (Class)" to obtain the Audit Class List.

If the school has configured the Horizontal group title to be "Class" and the Vertical group title to be "Room" (as is common for a Primary school) then the following will be displayed:

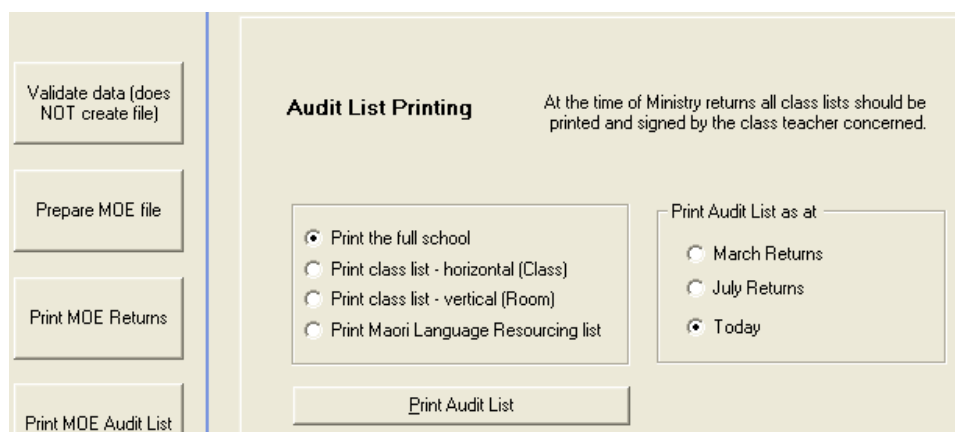


Illustration 25 : The audit list printing screen – a possible primary school appearance



A Secondary school would therefore click the "Print class list – horizontal (Class) and a Primary school the "Print class list – vertical (Room) to obtain the Audit Class List.

You can elect to print a single list for the full school, or horizontal groups or vertical groups, or the Maori Language Resourcing list. You may also choose to have the audit lists printed as at the time of the March returns, the July returns or as at the current date. An example of such a list is shown below.

Each teacher responsible for a group should sign the bottom of the printed list and these should be kept to be made available, on request, to the Ministry of Education Roll Audit officers as and when necessary.

MUSAC Demonstration 29/11/2003 AUDIT LIST										Yr8
No.	Family Name	First Names	Att	Status	Gender	Date of Birth	MOE Year	Class	Room	FTE
1	AD	Tay		Full time	F	29/01/1992	8	Yr8	Rm19	1.0
2	AV	Ros Scott		Full time	F	21/07/1991	8	Yr8	Rm17	1.0
3	BH	Har		Full time	M	03/05/1991	8	Yr8	Rm18	1.0
4	BU	Zoe		Full time	F	20/04/1992	8	Yr8	Rm19	1.0
5	CA	Sean Evans		Full time	M	02/05/1991	8	Yr8	Rm17	1.0
6	CR	Dav		Full time	M	20/04/1992	8	Yr8	Rm17	1.0
7	DC	Rob m		Full time	M	19/01/1992	8	Yr8	Rm17	1.0
8	ED	Lau		Full time	F	01/11/1991	8	Yr8	Rm17	1.0
9	EN	Sam ge Rich		Full time	M	17/09/1991	8	Yr8	Rm18	1.0
10	FIL	Meg ra		Full time	F	17/07/1991	8	Yr8	Rm17	1.0
11	FL	Kim		Full time	F	16/07/1991	8	Yr8	Rm19	1.0
12	FR	Geo son		Full time	M	25/11/1991	8	Yr8	Rm17	1.0
13	GA	Bob as		Full time	M	09/08/1991	8	Yr8	Rm19	1.0
14	HE	Caib		Full time	F	16/12/1991	8	Yr8	Rm17	1.0
15	KA	Gar n		Full time	M	31/10/1991	8	Yr8	Rm19	1.0
16	KA	Jord		Full time	M	29/02/1992	8	Yr8	Rm17	1.0
17	KH	Atair		Full time	M	22/07/1991	8	Yr8	Rm18	1.0
18	LE	Tays		Full time	M	11/03/1992	8	Yr8	Rm19	1.0
19	LQ	Beth e		Full time	F	06/04/1992	8	Yr8	Rm17	1.0
20	MA	Fran ay		Full time	M	30/06/1991	8	Yr8	Rm19	1.0
21	Mc	Ash andra		Full time	F	20/10/1991	8	Yr8	Rm18	1.0
22	MIL	Caib		Full time	F	11/03/1992	8	Yr8	Rm19	1.0
23	NIC	Mich am		Full time	M	04/06/1991	8	Yr8	Rm18	1.0
24	PE	Gian do		Full time	M	11/11/1991	8	Yr8	Rm19	1.0
25	PIE	Bre es		Full time	M	25/07/1991	8	Yr8	Rm17	1.0
26	RA	Rich el		Full time	M	04/07/1991	8	Yr8	Rm19	1.0
27	SIL	Isaa		Full time	M	07/11/1991	8	Yr8	Rm18	1.0
28	SIL	Tys		Full time	M	07/11/1991	8	Yr8	Rm18	1.0
29	SC	Jam Royal		Full time	M	07/12/1991	8	Yr8	Rm17	1.0
30	TE	Zak rgy Troy		Full time	M	28/09/1991	8	Yr8	Rm18	1.0
31	TR	NT Zoe		Full time	F	26/10/1991	8	Yr8	Rm19	1.0
32	VIN	Nat avera		Full time	F	21/03/1992	8	Yr8	Rm18	1.0
33	WFF	Sam		Full time	M	08/04/1991	8	Yr8	Rm18	1.0

(Please mark in the Att column those who are present today. Please comment on any absence.)

**All of the students in my Form are on this list and all of the students on this list are in my Form.**

Signed: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Illustration 26 : An example of an audit list

The following illustration shows the generation of a list of students for whom no classes were found. (You will note the testing of long names for both Family name and First names.

Op <input type="checkbox"/> College		AUDIT LIST - Form List					No Form recorded			
No.	Family Name	First Names	Att	Type	Gen-der	Date of Birth	MOE Year	Form	TGRP	FTE
1		Kate		RE	F	20/11/1990	9		FROF	1.0
2		Simeon		RE	M	20/09/1998	2		KEMF	1.0
3	Bl	Susan		RE	F	10/03/1999	1			1.0
4	Co	Roy Repunga Charles		RE	M	24/01/1987	13		WICN	1.0
5	Go	Thisisatestforsixtychar actersaaaaaaaaaaaaaa aaaaaaaaaaaaaaaaaaaa		RE	F	20/11/1990	10			1.0
6	Gr			RE	F	12/03/2000	1			1.0
7	Gr	Helen		RE	F	13/12/1996	4			1.0
8	Gr	Rose		RE	F	02/02/2000	1			1.0
9	Jg	Richard		RE	M	11/03/1999	1			1.0
10	Ka			RE	F	19/11/1990	9		KALM	1.0
11	Ke	Patricia		RE	F	16/09/2000	0			1.0
12	Sr	Jane		RE	F	01/03/2000	1			1.0
13	Thisisastudentwithsixt ylettersintheirnamen nnnnnnnnnnnnnnnnnn	James		RE	M	20/11/1990	9		FROF	1.0

(Please mark in the Att column those who are present today. Please comment on any absence.)

**Ministry of Education Required Declaration:**

**All of the students in the class are on the class list and that all on the class list are attending school.**

Class Teacher: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_

Illustration 27 : An example of an audit list of students with no class recorded.

The following list, which appears at the end of the prints, lists those students who have been omitted from the returns due to their having an excluded 'Type'.

Op <input type="checkbox"/> College		AUDIT LIST					Omitted Student Types (Form order)			
No.	Family Name	First Names	Att	Type	Gen-der	Date of Birth	MOE Year	Form	TGRP	FTE
1	H	Nicola Marie		SF	F	20/05/1988	11	11E1	FROF	1.0
2	Gi	Joseph Turi		KT	M	13/08/1988	11	11E2	STAM	1.0
3	H	Gabriel Moanaroa		NA	F	10/03/1988	12	12E2	KALM	1.0
4	Gi	Phillip Hemi		EM	M	17/01/1987	13	13	STAM	1.0
5	Gi	Reuben Lee		SA	M	25/03/1991	9	9HIT	HITN	1.0

Illustration 28 : An example of the list of students omitted from the returns

The following illustration shows examples of the Maori Language Resourcing list. Each level begins on a new page and totals are given for each year level.

<b>Maori Language Resourcing List</b>							
<b>Level 4(a): 12-30%</b>							
<b>Op [ ] College</b>							
No.	Family Name	First Names	Maori Language Learning Index	MOE Year Level	Ethnicity 1	Ethnicity 2	Ethnicity 3
1	Hu [ ]	Whaiora Jamie-Lee Danelle	D	14	NZM		
2	Alli [ ]	Yvonne	D	14	NZM		
Level 4(a): 12-30%, Year 14: Total number of students = 2 Total number of Maori students = 2							
No.	Family Name	First Names	Maori Language Learning Index	MOE Year Level	Ethnicity 1	Ethnicity 2	Ethnicity 3
1	Ta [ ]	Stephen Kingi Ropiha	D	13	NZM		
2	Pa [ ]	Nancy Ani	D	13	NZM		
3	Pa [ ]	Matekitatahi Justin	D	13	NZM		
Level 4(a): 12-30%, Year 13: Total number of students = 3 Total number of Maori students = 3							
No.	Family Name	First Names	Maori Language Learning Index	MOE Year Level	Ethnicity 1	Ethnicity 2	Ethnicity 3
1	Wii [ ]	Jamie-Lee Catherine	D	12	NZM		
2	Pe [ ]	James Te Nana Robert John	D	12	NZM		
3	Ca [ ]	Tawa Anthony	D	12	NZM		
Level 4(a): 12-30%, Year 12: Total number of students = 3 Total number of Maori students = 3							

Illustration 29 : An example of the Maori Language Resourcing list

## 21.6 Reviewing the subject codes

On validating some secondary school data we received a warning that there were faults in our subject codes. The 'Review subject codes' button leads to the 'Subject connections' configuration process. This is dealt with in full in a chapter dealing with configuration, so, at this point, we shall only review the cause of the faults identified.

The following illustration shows a previewed list of errors identified for a different school.

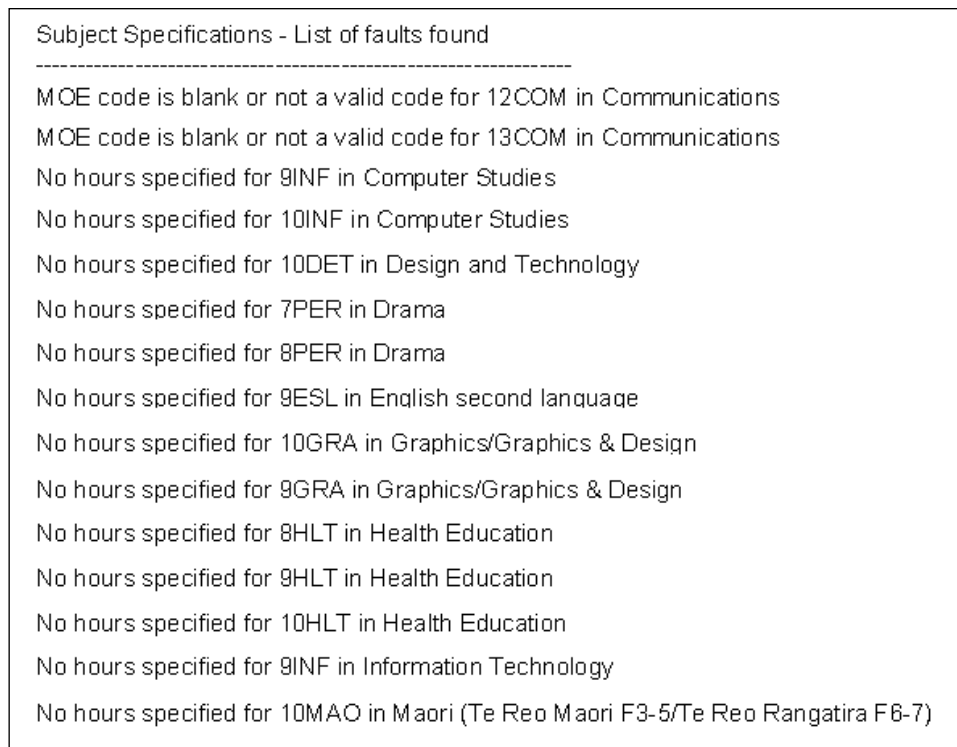


Illustration 30 : A list of subject code errors

On clicking the button above, the following screen will be displayed.

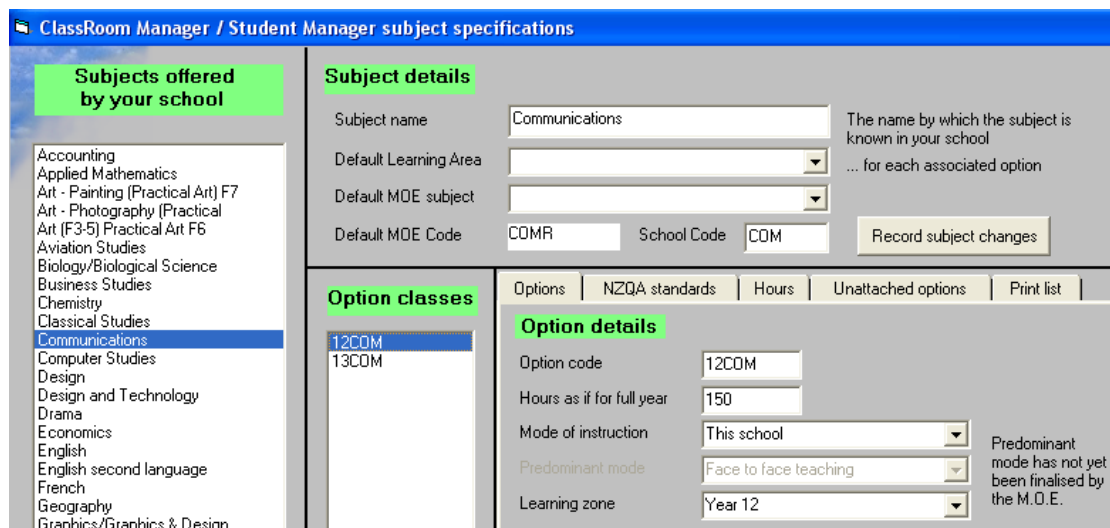


Illustration 31 : The subject connections screen (top half)

As can be seen from the screen above, having navigated to Communications and its 12COM option, there is indeed missing information concerning the subject in the top right hand panel of the screen.

In the screen below, the missing information has been entered.

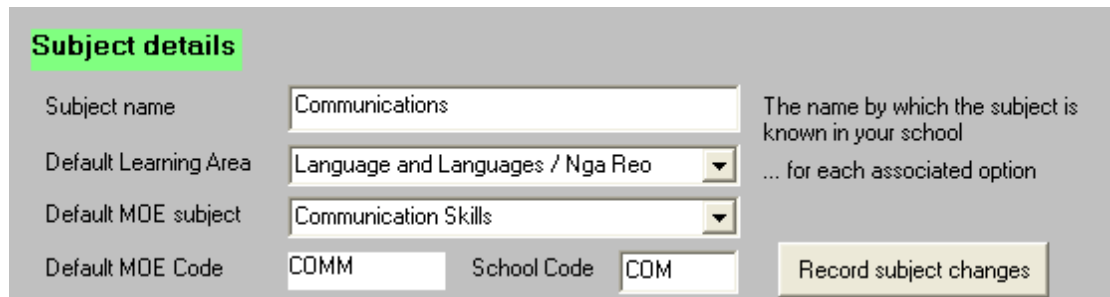


Illustration 32 : The subject connections screen (top half)

To correct the missing hours, rather than visit each individual subject / option combination, it is faster to visit the global hours routine, pointed to by an arrow in the following illustration.

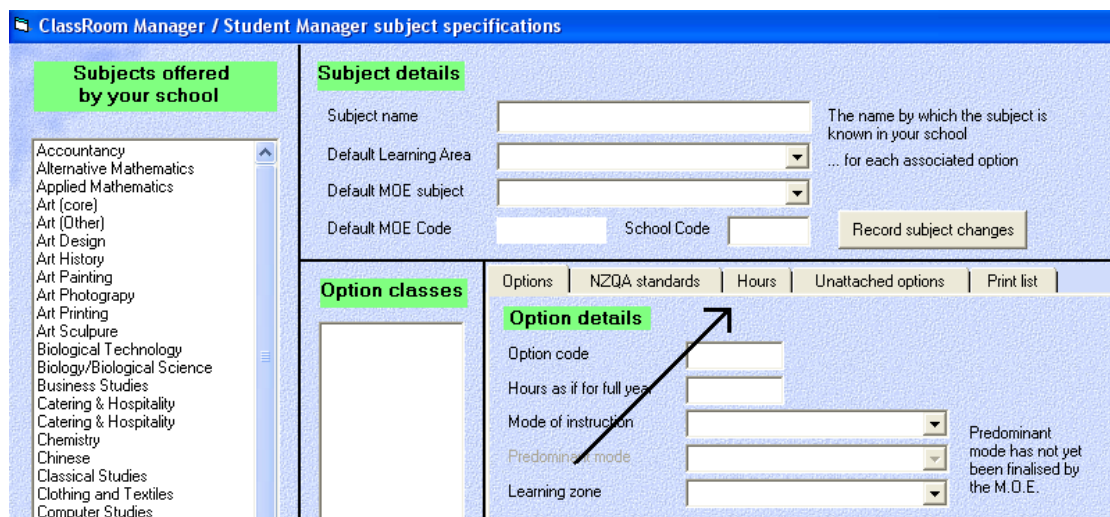


Illustration 33 : Access to the global hours utility

Selecting this tab, the hours for each option will be displayed and, sure enough, there are several missing. These can be entered directly against the options and saved.

**Note:** The hours entered **MUST** be the number of hours which the option would occupy if it was **taken for the full year**. Refer to the configuration chapter on this topic for further explanation.

**Default hour settings**

The Ministry of Education (from 2003) requires schools to provide information relating to the number of hours students spend in each subject during the year.

Enter here the number of hours which would be spent in each option if the option was taken for the FULL year.

If you rotate timetables (e.g. students move through (say) three sets of options per year) then these entries will be adjusted automatically for this scenario for Ministry returns.

Option	Hours
10BUS	90
10DET	0
10ENG	150
10ESL	90
10FRE	90
10GRA	0
10HLT	0
10INF	0
10INF	90
10JPN	90
10MAO	0
10MAT	150
10MUS	90
10PED	60
10SCI	120
10SOC	90

Either enter the hours for each option separately...

... or select options from the table, enter the hours below, and click 'Set hours'

Hours :

Illustration 34 : The global hours utility

## 21.7 Returning data to the Ministry of Education

When you forward your returns to the Ministry of Education you must include, along with the printed tables, your relevant RS form (eg. RS31 for primary schools, PS43 for secondary schools).

It is possible that the Ministry of Education may request a copy of the returns file at a later date. If this is the case, then the required file will be found in your \cm folder and is named as follows :

- Your school's MOE number
- The roll collection month (M for March, J for July)
- The returns year (2 digits)
- The file extension .moe

For example, Te Puke High School, March 2008 returns text file would be 123m08.moe.

## 22 The MUSAC eRoll Returns Module

Before using the MUSAC eRoll Returns module, complete the normal returns process using Student Manager. Take a note of the last five digits of the checksum which is printed on the bottom right of the tables as this will be required during the submission process. In order to ensure the electronic file exactly matches the paper tables, the Ministry requires the paper tables to have been signed and posted prior to submitting the .moe file.

### 22.1 Requirements

- 1 Installation of the Electronic Roll Returns Wrapper requires installation of the Microsoft .Net Framework 2.0. This is available to registered users of MUSAC's website ([www.musac.co.nz](http://www.musac.co.nz)) via the Software Download page or the MUSAC Software CD, or alternatively it can be downloaded from Microsoft ([www.microsoft.com/download](http://www.microsoft.com/download)).
- 2 A PDF file viewer such as Acrobat PDF Reader will be required, eg. from [www.adobe.com](http://www.adobe.com).

See separate eRoll Returns manual also available on our website via > Downloads > MUSAC Classic, Ministry of Education Wrapper, the eRoll Returns Guide; also available on our release CD.

To access the MUSAC eRoll Returns module click **MUSAC Electronic Roll Return** on the left panel of the Student Manager Ministry Returns screen.

MOE electronic roll return submission

Middle Earth School

July Returns Date: 1st July 2008

School number: 0187  
School type: Secondary School (Year 9 - 15)

Check Connectivity Only      Submit .MOE File to Ministry

NOTE - Prior to submitting your .moe file to the Ministry make sure that you have  
1. Printed the tables  
2. Recorded the last five digits of the checksum printed on the bottom right of the tables  
and 3. Signed and posted the tables to the Ministry.

System Admin - Reset Message

Close

Student Manager eRR submission screen

The **Check Connectivity only** button enables schools to test the connectivity without the need for a valid .moe file. A special message is sent to the Ministry server to test and ensure that all security parameters are set up and configured correctly thus any potential problems are highlighted well before being ready to submit a valid .moe file.

The button to **Submit .MOE File to Ministry** may only be used once the error-free .moe file has been created, the tables printed and signed and posted to the MoE. This ensures the electronic file exactly matches the paper tables. The Ministry requires confirmation this is the finalised roll return information, and to confirm satisfaction that the information can be used to determine the school's funding.

Information on specific current changes is outlined in the notes for the Ministry returns on our website, [www.musac.co.nz](http://www.musac.co.nz)



## 23 Get Check NSN

Student Manager incorporates capability to automatically retrieve National Student Numbers from the Ministry web server. A link is stored in Column 795 for each student. All log files are contained in the enrol subfolder within the cm folder.

### 23.1 Get/check Configuration

This configuration is similar to the configuration of eRR.

Before using the get/check function in SM, you must configure the settings

- proxy user name
- proxy password
- proxy address
- proxy port
- MOE service address
- wrapper server address
- MOE test service address

<http://web.minedu.govt.nz/webservices/DEX-DexServiceX509-Prd-01.00.00.wsdl>

- Wrapper server address: <http://localhost>

Once these settings are set up, clicking **Test Connection** can verify whether these settings are working.

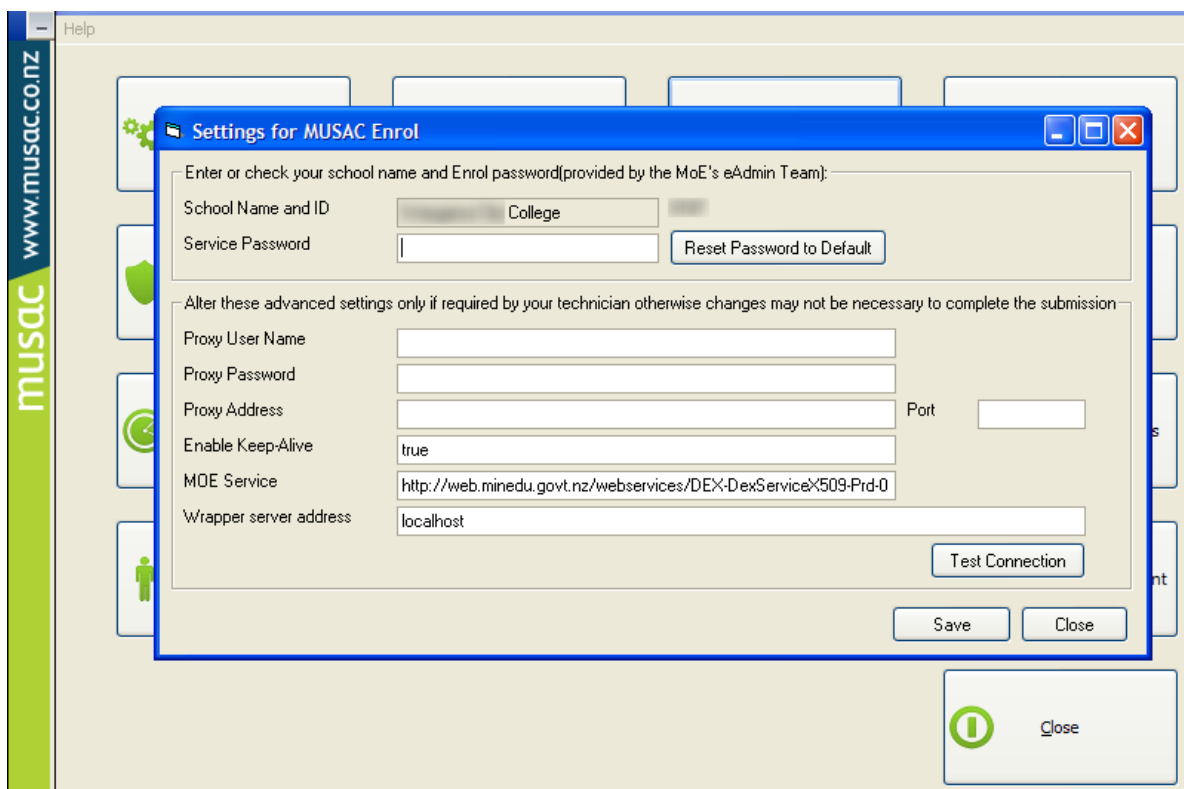


Figure 308: Settings for MUSAC Enrol details

## 23.2 Adding a New Student

- 1 Enter new student data
- 2 Click **Get/Check NSN** button
- 3 Wait for processing results from MOE Enrol server
  - Response B = Confirmed NSN.
  - Response F = New NSN. No further action is required for either of these response types. The NSN will automatically fill the National Student Number field.

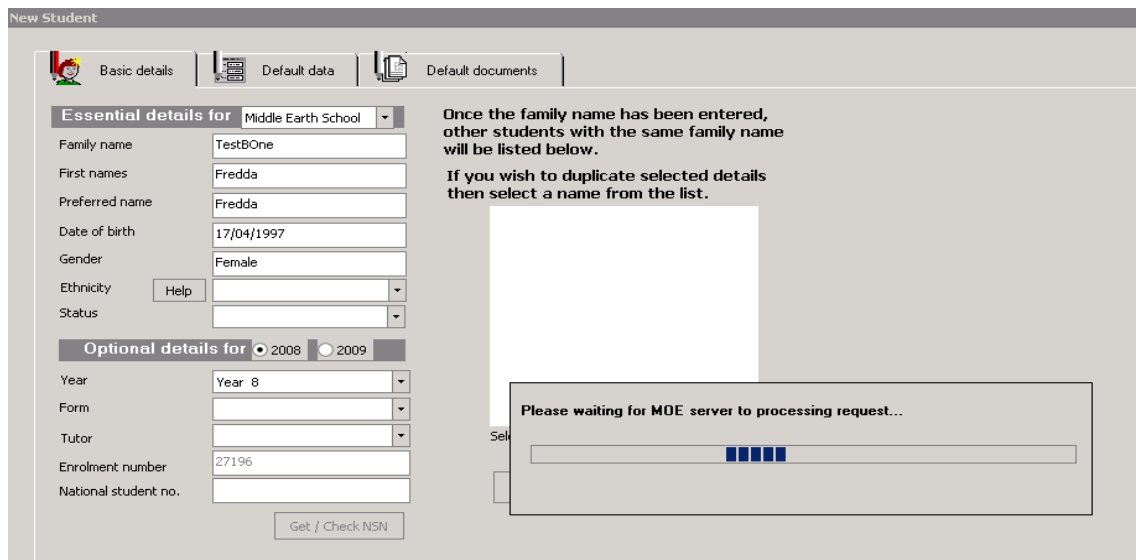


Figure 309: Add new student screen processing Get/Check NSN

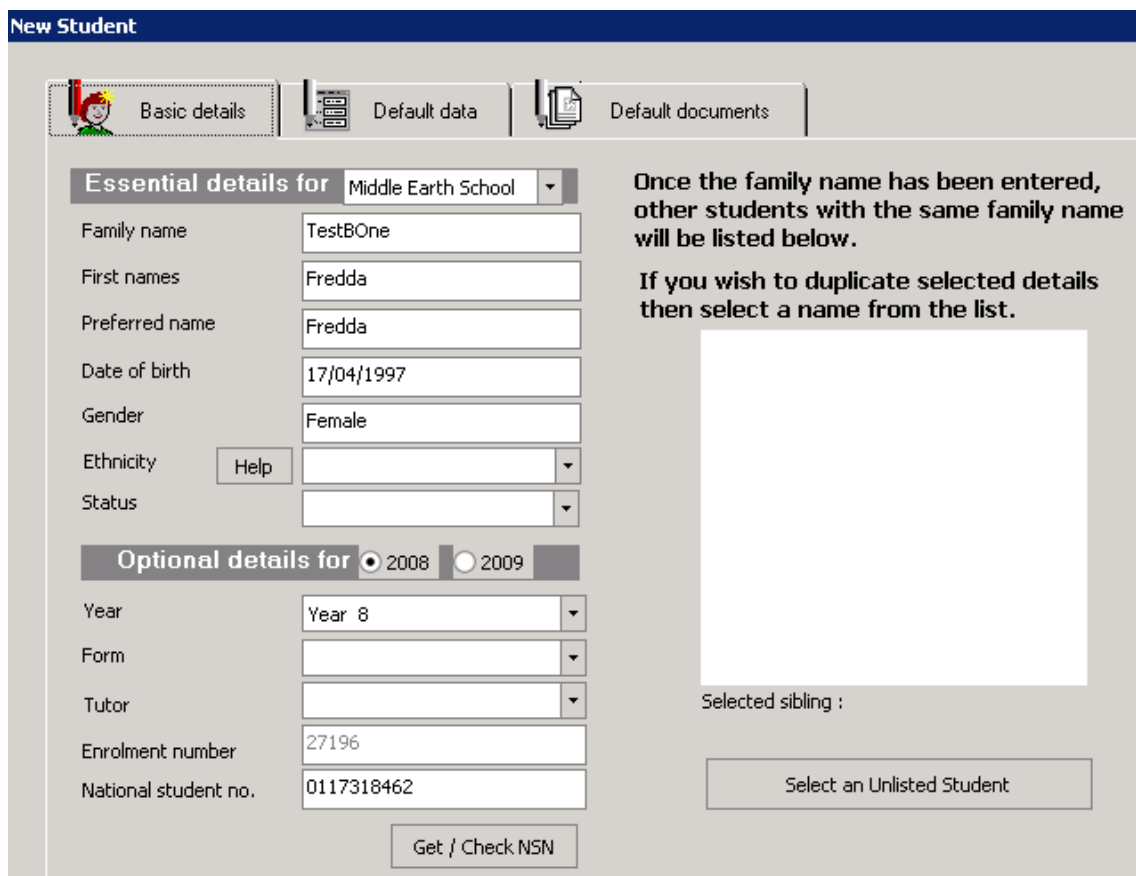


Figure 310: Successfully filled National student no. field

- Response type A = If an error has occurred an error message is displayed and further action is required.

### Get/check NSN for existing students

- 1 From the SM Utilities screen click **Get/Check NSN**.
- 2 Select a student from the existing student list on the right side of the screen.
- 3 Click the **Get/check NSN** button.
- 4 NSN Response handling is similar to New Student but will update the cm database automatically.
- 5 Clicking on an Enrol URL links to the Enrol website.

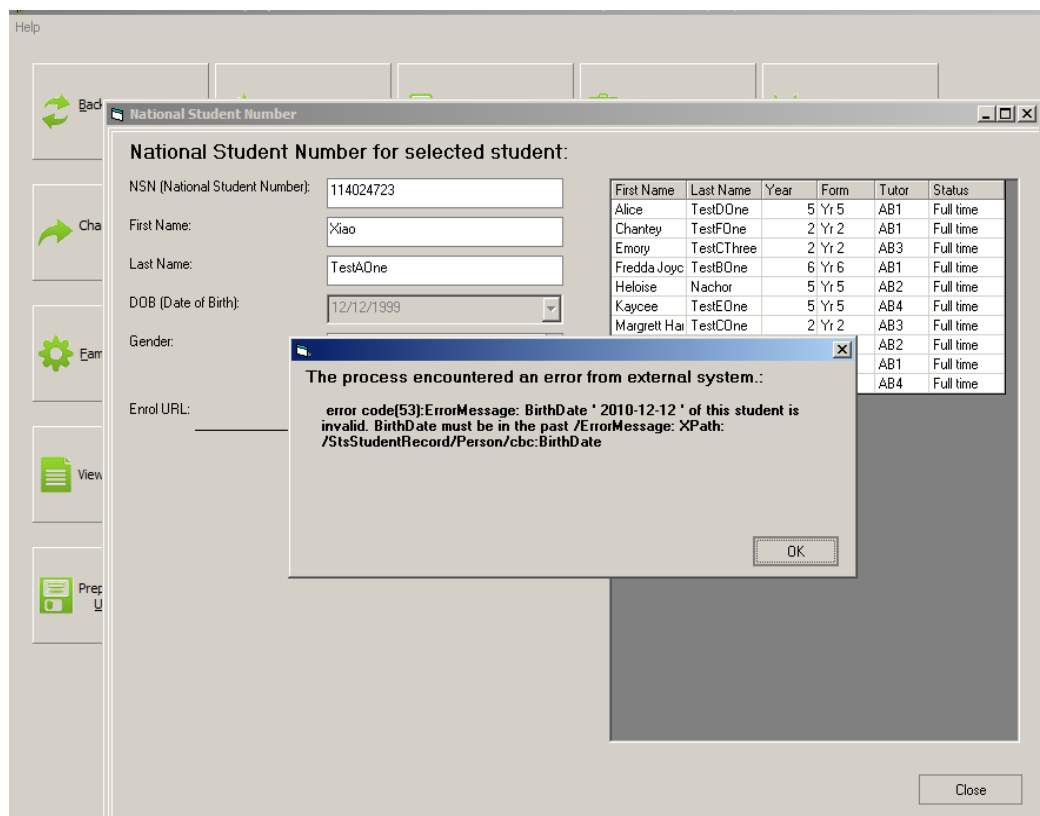


Figure 311: Error message response (check birth date)

- Response type C and D = Found matched record with differences or a partially match of the data. Discrepancies on data are displayed with a grey background. You can select this partially matched record and click the **Update student** button to update data on the “students personal” page. Otherwise double-click the URL column to link to MOE Enrol website to update the data for this student. Click **Print** to preview print for further reference. The **Cancel** button is disabled here as it only updates data in the “students personal” page.

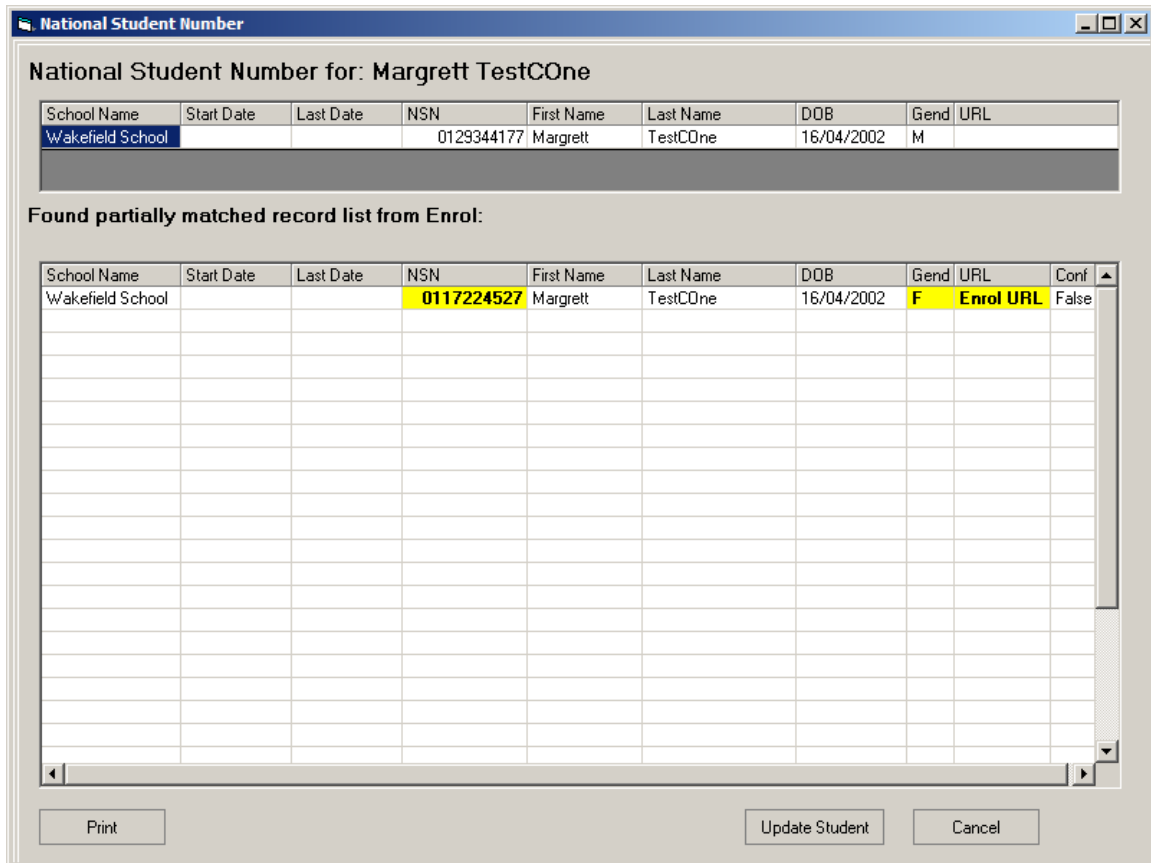
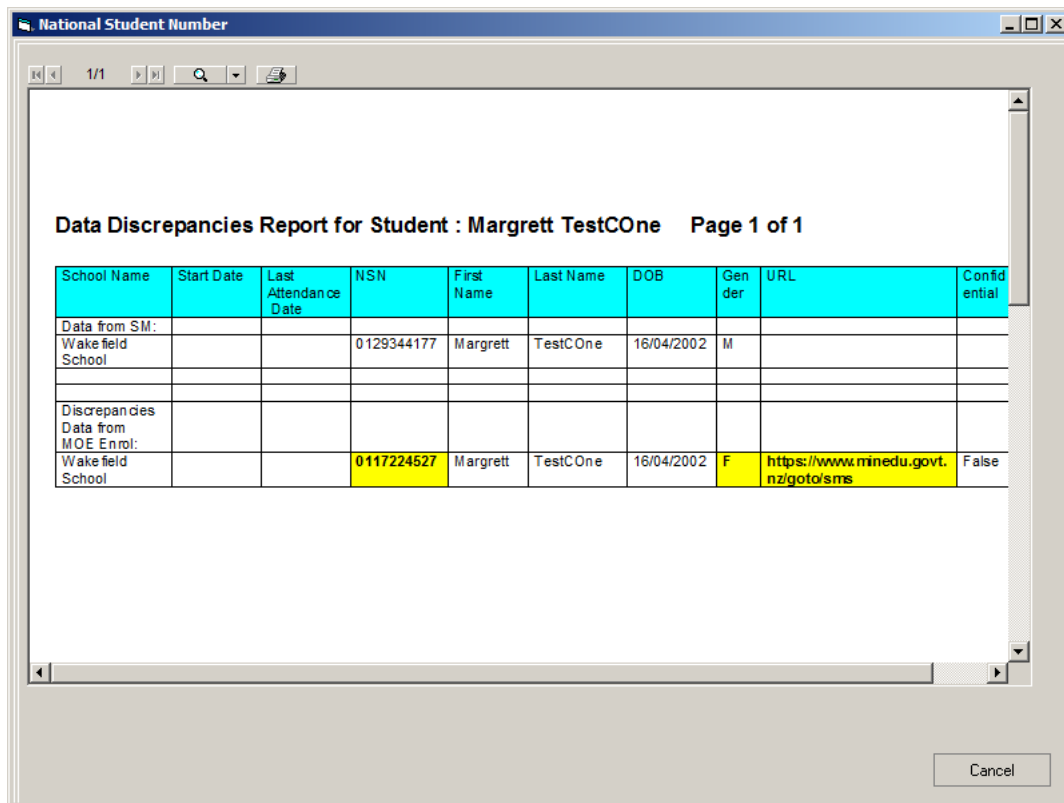


Figure 312: NSN with a difference or Partially Matched Record

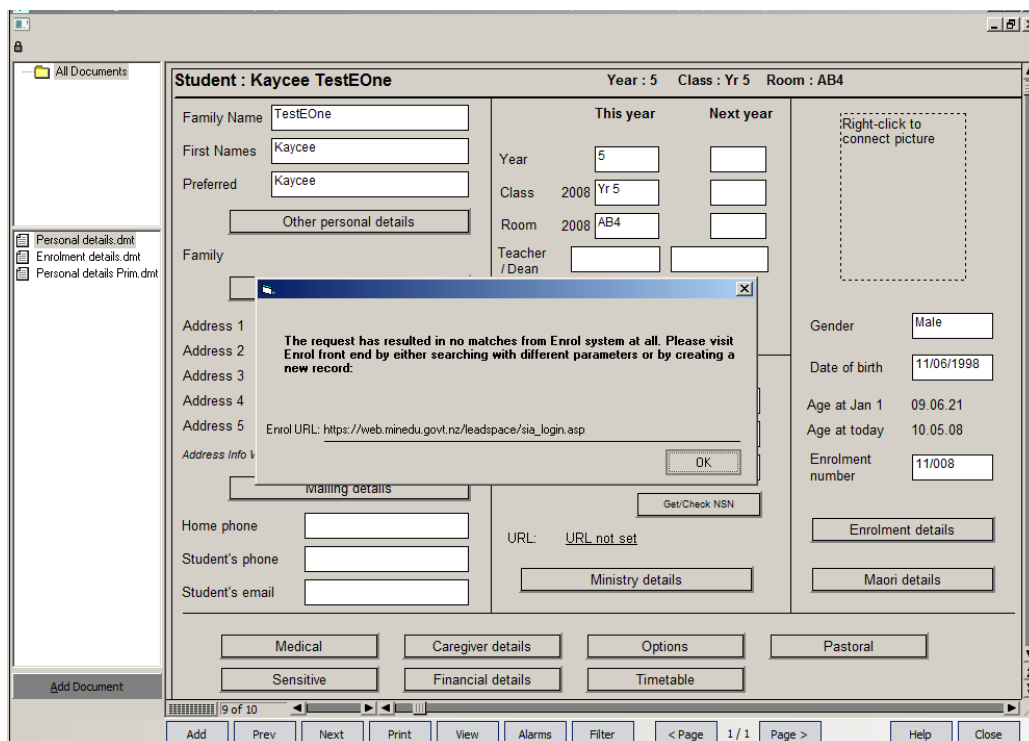
**Note:** If selecting this student with a partial match and the Date of Birth is different, selecting this record with highlighted differences will change in the Student Manager program eg. the highlighted Date of Birth will reflect the change.



School Name	Start Date	Last Attendance Date	NSN	First Name	Last Name	DOB	Gender	URL	Confidential
<b>Data from SM:</b>									
Wake field School			0129344177	Margrett	TestCOne	16/04/2002	M		
<b>Discrepancies Data from MOE Enrol:</b>									
Wake field School			0117224527	Margrett	TestCOne	16/04/2002	F	https://www.minedu.govt.nz/goto/sms	False

Figure 313: Data Discrepancies Report

- Response E = No matched record found at all. You are asked if you wish to go to Enrol; click yes and it takes you to the Enrol website.



**Student: Kaycee TestEOne**      Year : 5    Class : Yr 5    Room : AB4

Family Name: TestEone      This year    Next year

First Names: Kaycee      Year: 5

Preferred: Kaycee      Class: 2008 Yr 5

Other personal details

Family:      Room: 2008 AB4

Teacher / Dean:      Gender: Male

Address 1:      Date of birth: 11/06/1998

Address 2:      Age at Jan 1: 09.06.21

Address 3:      Age at today: 10.05.08

Address 4:      Enrolment number: 11/008

Address 5:      Enrol URL: https://web.minedu.govt.nz/leadspace/sia\_login.asp

Address Info:      OK

Waiting details      Get/Check NSN

Home phone:      URL: URL not set

Student's phone:      Ministry details

Student's email:      Maori details

Medical    Caregiver details    Options    Pastoral

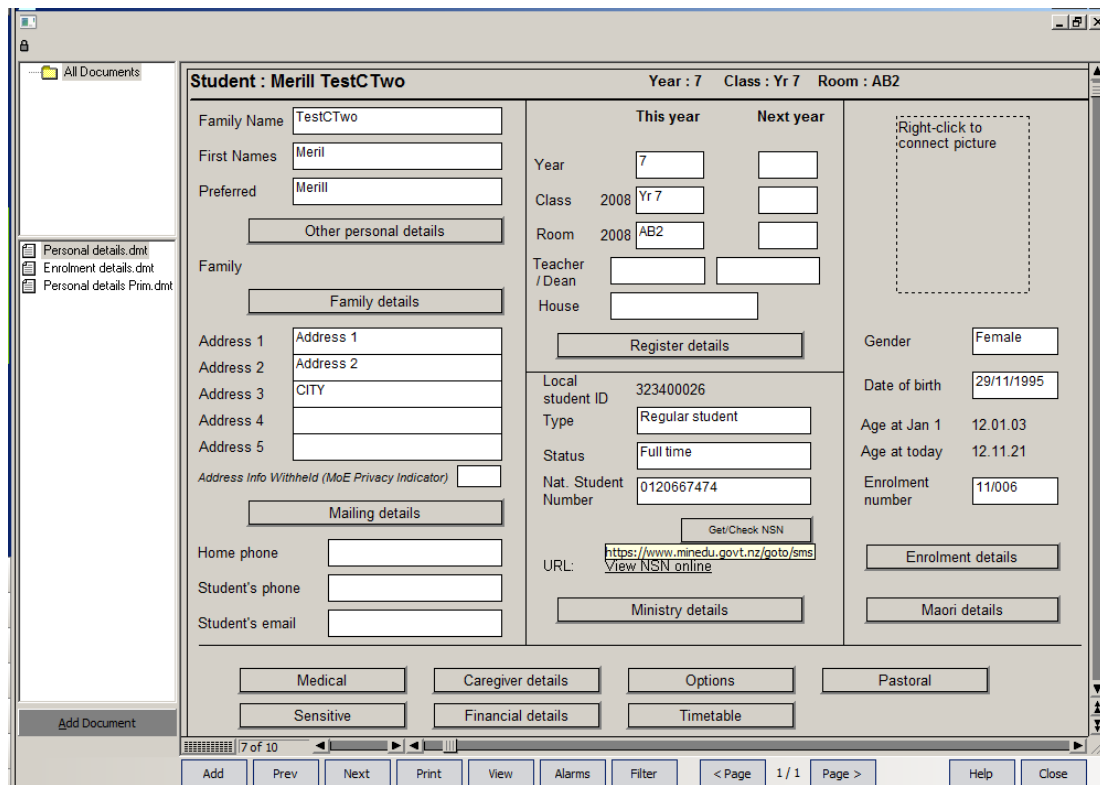
Sensitive    Financial details    Timetable

9 of 10    Add    Prev    Next    Print    View    Alarms    Filter    < Page 1 / 1 Page >    Help    Close

Figure 314: Request to create Enrol record

### 23.3 Documents

The Get/check NSN function can be added into any customised documents. The default Personal Details document has been updated as follows:



**Student : Merill TestCTwo**      Year : 7    Class : Yr 7    Room : AB2

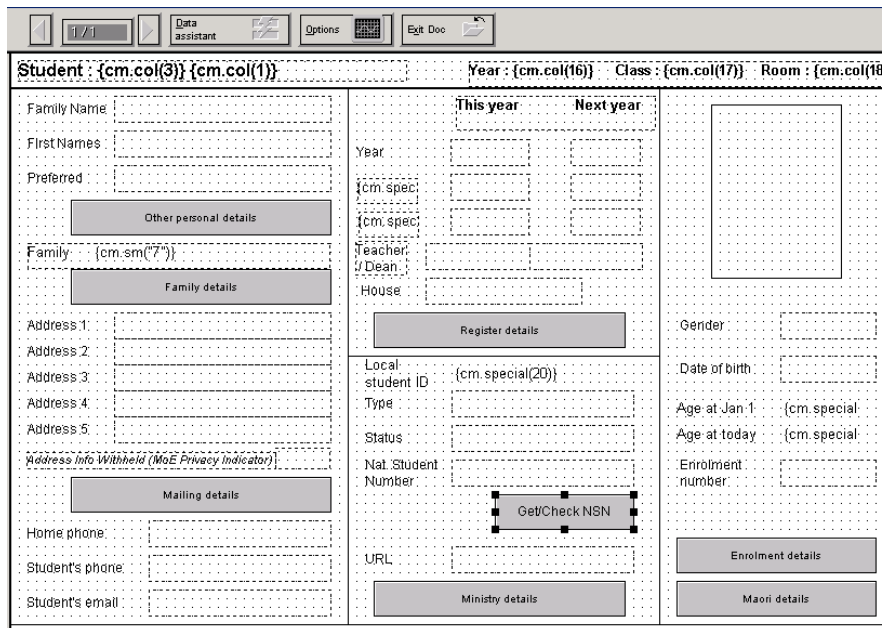
Family Name	TestCTwo	<b>This year</b>		<b>Next year</b>	Right-click to connect picture	
First Names	Meril	Year	7			
Preferred	Merill	Class 2008	Yr 7			
<input type="button" value="Other personal details"/>		Room 2008	AB2			
Family		Teacher / Dean			<input type="button" value="Enrolment details"/>  <input type="button" value="Maori details"/>	
<input type="button" value="Family details"/>		House				
Address 1	Address 1	<input type="button" value="Register details"/>		Gender		Female
Address 2	Address 2	Local student ID	323400026	Date of birth		29/11/1995
Address 3	CITY	Type	Regular student	Age at Jan 1		12.01.03
Address 4		Status	Full time	Age at today		12.11.21
Address 5		Nat. Student Number	0120667474	Enrolment number		11/006
Address Info Withheld (MoE Privacy Indicator)		<input type="button" value="Get/Check NSN"/>		<input type="button" value="Enrolment details"/>		
Mailing details		URL: <a href="https://www.minedu.govt.nz/goto/sms">https://www.minedu.govt.nz/goto/sms</a>		<input type="button" value="Maori details"/>		
Home phone		<input type="button" value="Ministry details"/>				
Student's phone						
Student's email						
<input type="button" value="Medical"/>		<input type="button" value="Caregiver details"/>		<input type="button" value="Options"/>		
<input type="button" value="Sensitive"/>		<input type="button" value="Financial details"/>		<input type="button" value="Timetable"/>		
<input type="button" value="Pastoral"/>						

7 of 10 | Add Prev Next Print View Alarms Filter < Page 1 / 1 Page > Help Close

Figure 315: Updated Personal Details screen

*To add the Get/Check NSN button into a document*

- 1 Using the button object from the toolbox create a new button on your document
- 2 Enter "form frmNSN" into the "Action" property for this button
- 3 Enter "Get/Check NSN" into the "Caption" property
- 4 Save the document



Student : {cm.col(3)} {cm.col(1)} Year : {cm.col(16)} Class : {cm.col(17)} Room : {cm.col(18)}

Family Name: [ ] This year: [ ] Next year: [ ]

First Names: [ ] Year: [ ]

Preferred: [ ] {cm.spec: [ ] {cm.spec: [ ]

Other personal details [ ]

Family: {cm.sm("7")} Teacher: [ ]

Family details [ ] / Dean: [ ]

Address 1: [ ] House: [ ]

Address 2: [ ] Register details [ ]

Address 3: [ ]

Address 4: [ ] Local student ID: {cm.special(20)} Gender: [ ]

Address 5: [ ] Type: [ ] Date of birth: [ ]

Address info withheld (MoE Privacy Indicator) [ ] Status: [ ] Age at Jan 1: {cm.special: [ ]

Mailing details [ ] Nat. Student Number: [ ] Age at today: {cm.special: [ ]

Home phone: [ ] URL: [ ] Enrolment number: [ ]

Student's phone: [ ] Ministry details [ ] Enrolment details [ ]

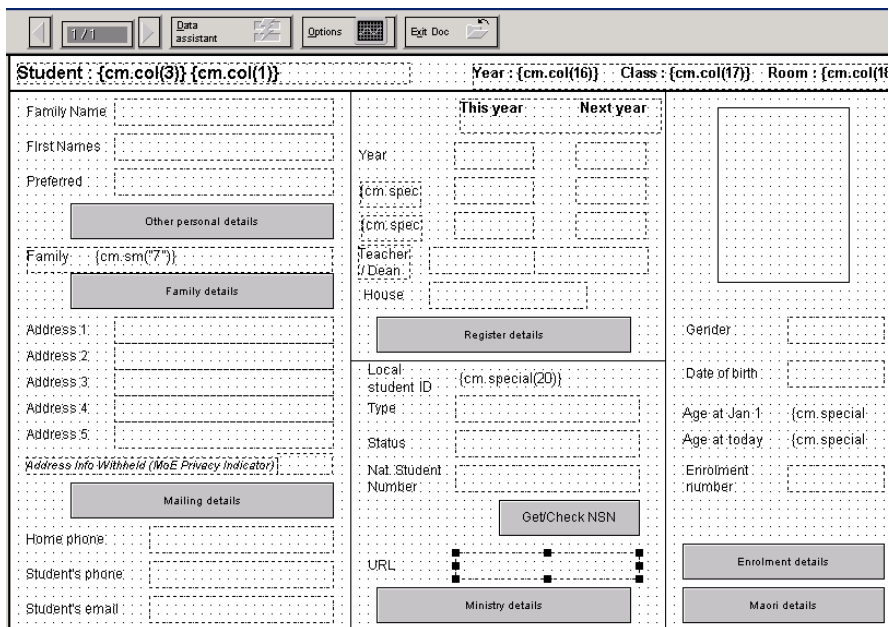
Student's email: [ ] Maori details [ ]

Get/Check NSN [ ]

Figure 316: Get/Check NSN button now in document

*Add URL field into a document*

- 1 Add a data field into your document for this data box
- 2 Enter 795 into "Column" property
- 3 Enter URL into "Caption" property
- 4 Save document



Student : {cm.col(3)} {cm.col(1)} Year : {cm.col(16)} Class : {cm.col(17)} Room : {cm.col(18)}

Family Name: [ ] This year: [ ] Next year: [ ]

First Names: [ ] Year: [ ]

Preferred: [ ] {cm.spec: [ ] {cm.spec: [ ]

Other personal details [ ]

Family: {cm.sm("7")} Teacher: [ ]

Family details [ ] / Dean: [ ]

Address 1: [ ] House: [ ]

Address 2: [ ] Register details [ ]

Address 3: [ ]

Address 4: [ ] Local student ID: {cm.special(20)} Gender: [ ]

Address 5: [ ] Type: [ ] Date of birth: [ ]

Address info withheld (MoE Privacy Indicator) [ ] Status: [ ] Age at Jan 1: {cm.special: [ ]

Mailing details [ ] Nat. Student Number: [ ] Age at today: {cm.special: [ ]

Home phone: [ ] URL: [ ] Enrolment number: [ ]

Student's phone: [ ] Ministry details [ ] Enrolment details [ ]

Student's email: [ ] Maori details [ ]

Get/Check NSN [ ]

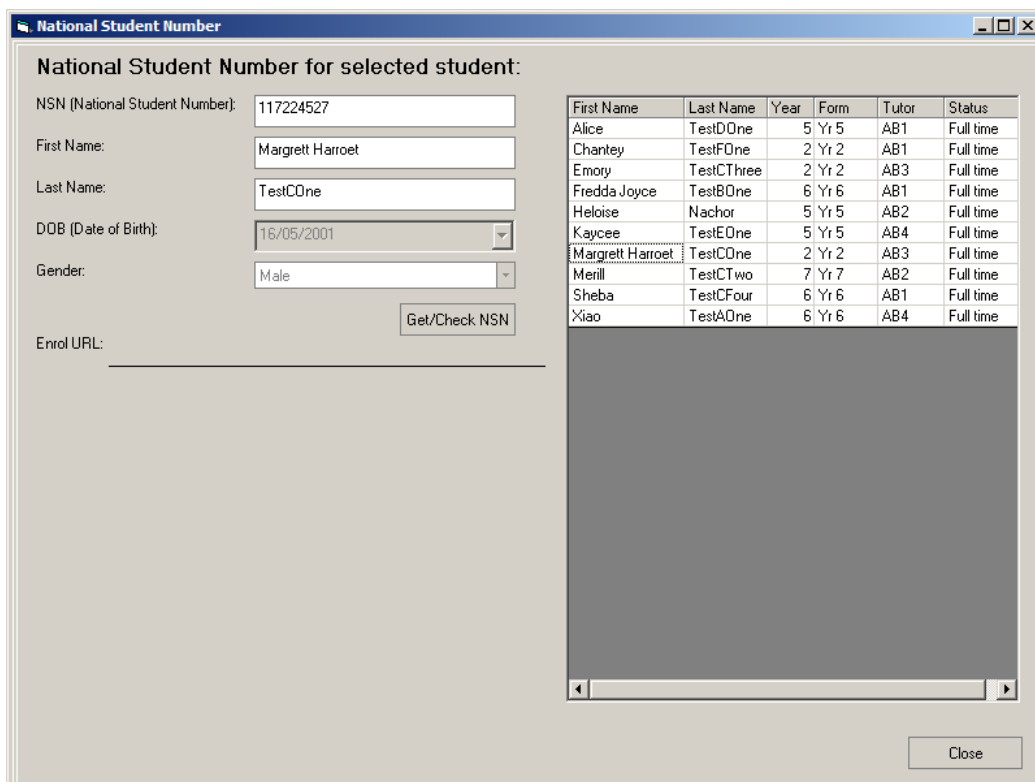
Figure 317: URL column in document

**Get/Check NSN – response types**

- Response type A = If an error has occurred an error message is displayed and further action is required.
- Response type B = the student's NSN number has been confirmed.
- Response type C = Enrol has found a record that matches (NSN) record but some or all of the other data does not match. The difference in the data is displayed with grey

background. Select this partially matched record and click the **Update student** button to update the data shown in the “student personal” page. Alternatively you can double-click the URL column to link to MOE Enrol to update data for this student. Click the **Print** button to preview the data and print for further reference. Clicking the **Cancel** button will remove the NSN and URL for this student and close the message screen.

- Response D = No matched record but found partially matched data. Different data is displayed with grey background. You may select this partially matched record and click the **Update** button to update. Alternatively you can double-click the URL column to link to MOE Enrol to update data for this student. Click the **Print** button to preview this data and print for further reference. Clicking the **Cancel** button will cancel the last operation which has been done through clicking the **Update** button.
- Response type E = No matched record found at all. User is asked if they want to go to Enrol.
- Response type F = No further action is required. The NSN will automatically fill the National Student Number field.



**National Student Number for selected student:**

NSN (National Student Number):

First Name:

Last Name:

DOB (Date of Birth):

Gender:

Enrol URL: \_\_\_\_\_

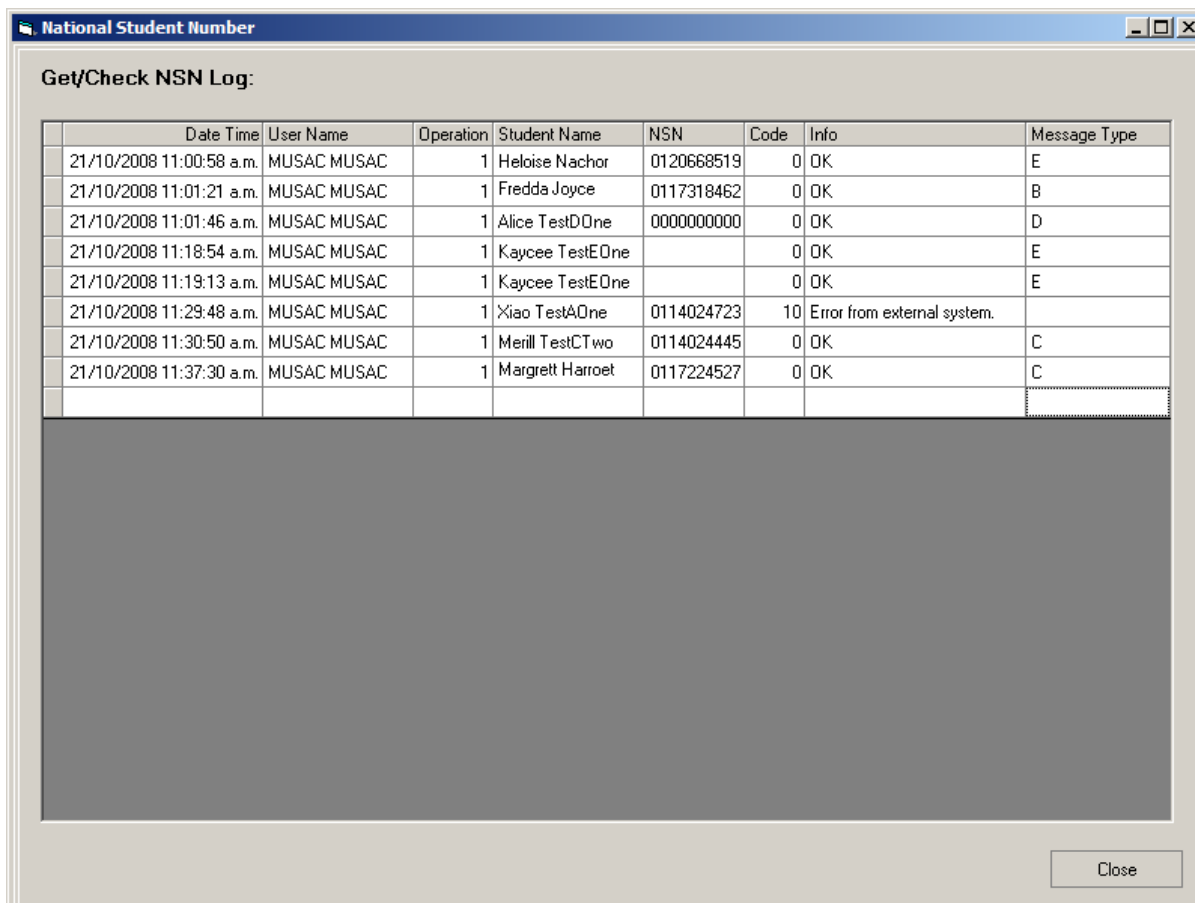
First Name	Last Name	Year	Form	Tutor	Status
Alice	TestDOne	5 Yr 5	AB1	Full time	
Chantey	TestFOne	2 Yr 2	AB1	Full time	
Emory	TestCThree	2 Yr 2	AB3	Full time	
Fredda Joyce	TestBOne	6 Yr 6	AB1	Full time	
Heloise	Nachor	5 Yr 5	AB2	Full time	
Kaycee	TestEOne	5 Yr 5	AB4	Full time	
Margrett Harroet	TestCOne	2 Yr 2	AB3	Full time	
Merill	TestCTwo	7 Yr 7	AB2	Full time	
Sheba	TestCFour	6 Yr 6	AB1	Full time	
Xiao	TestAOne	6 Yr 6	AB4	Full time	

Figure 318: Existing student successful NSN



### Viewing Logs

- Clicking **View Get/Check NSN log** in SM Utilities will show all text logged into the NSN log.

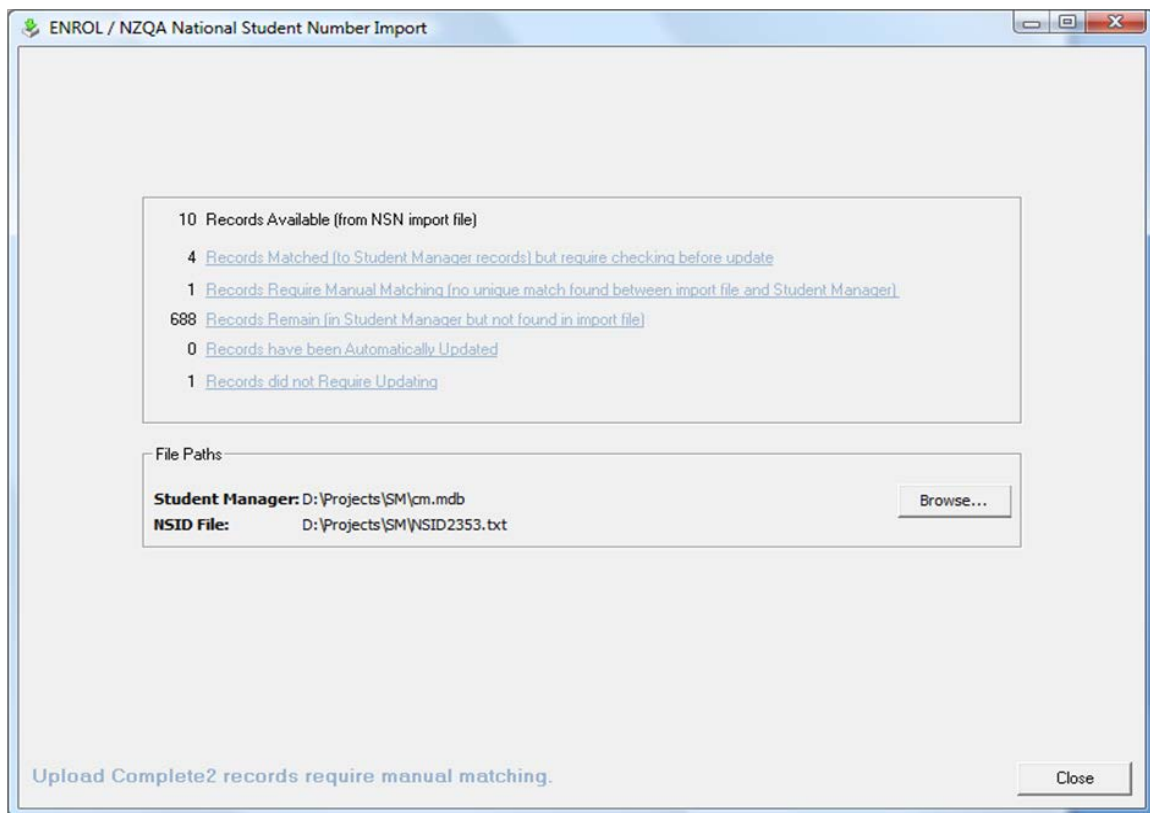


Date Time	User Name	Operation	Student Name	NSN	Code	Info	Message Type
21/10/2008 11:00:58 a.m.	MUSAC MUSAC	1	Heloise Nachor	0120668519	0	OK	E
21/10/2008 11:01:21 a.m.	MUSAC MUSAC	1	Fredda Joyce	0117318462	0	OK	B
21/10/2008 11:01:46 a.m.	MUSAC MUSAC	1	Alice TestDOne	0000000000	0	OK	D
21/10/2008 11:18:54 a.m.	MUSAC MUSAC	1	Kaycee TestEOne		0	OK	E
21/10/2008 11:19:13 a.m.	MUSAC MUSAC	1	Kaycee TestEOne		0	OK	E
21/10/2008 11:29:48 a.m.	MUSAC MUSAC	1	Xiao TestAOne	0114024723	10	Error from external system.	
21/10/2008 11:30:50 a.m.	MUSAC MUSAC	1	Merill TestCTwo	0114024445	0	OK	C
21/10/2008 11:37:30 a.m.	MUSAC MUSAC	1	Margrett Harroet	0117224527	0	OK	C

Figure 319: Get/check NSN Log viewer

## 23.4 Importing your NSID's

- Download your NSID file from the ENROL website and save it into your CM folder
- From the main screen in Student Manager click **Utilities > Import NSN Update**
- If a current and valid NSID file is found the utility will import its contents then give you a summary of results - as shown below.
- Most, if not all, records will import having matched with the students in your database.
- Records which do not match will be those students who have left from or arrived at your school since your March MoE Returns file was sent to the Ministry of Education. Clicking the third and fourth blue lines will list these students and this can then be printed for your reference.
- As before, the Get Check functionality within Student Manager or the ENROL website can be used to add or locate NSN's for those students who are newly arrived at your school.



## 24 Appendix 1 –MUSAC Backup Utilities

### 24.1 Using MUSAC AutoJeCT Compacting Tool

A new database maintenance utility has been developed to perform scheduled automated maintenance. See our website, [www.musac.co.nz](http://www.musac.co.nz) for further information.

### 24.2 Using MUSAC backup utility

The MUSAC generalised backup utility can be accessed from within both ClassRoom Manager and Student Manager and externally as a stand-alone program.

Its name is MUSACBackup.exe and it resides in the \cm directory. If you add it to your desktop as a shortcut then it might well appear as shown below.



Illustration 1 : MUSAC Backup shortcut

Access it either from within one of the two packages listed above or from the desktop shortcut and you will arrive at the main screen, shown below.

On the left is 'Utilities'.



Illustration 2 : The backup utility main screen

## Utilities

Click on the 'Utilities' button and you will arrive at the following screen :

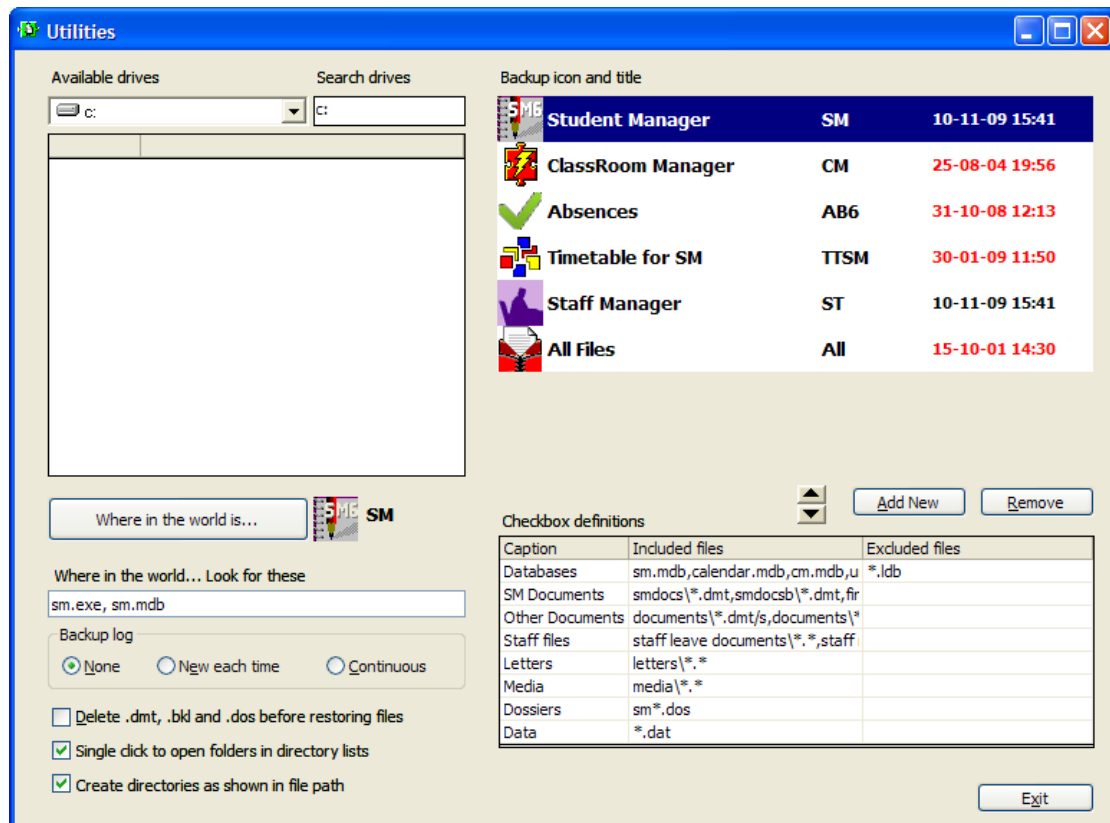


Illustration 3 : The Utilities screen

The purpose of Utilities is to allow you to :

- Find out where a program resides
- Specify the files to be included or excluded from the backup process
- Set backup parameters

Firstly, we'll look at the program finding capacity. On the right are the packages which can be backed up by this utility. If you select one then its main program file will be listed at the bottom right side of the screen. In the example below I am looking for cm.exe (which is really CMTeacher)

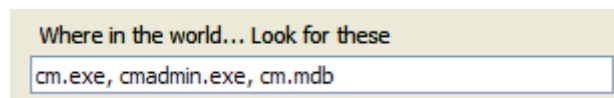


Illustration 4 : Searching for cm.exe

The next step is to specify the disk drive where you wish to search, after which you can click on the 'Where in the world is ...' button, shown below.

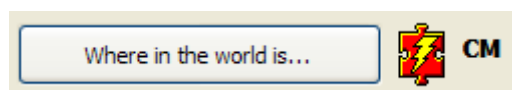


Illustration 5 : The search button

Click this button and the search is conducted. The results of the search are listed in the list box on the left side of the screen. As shown below, two copies of cm.exe were found on the C: drive tested.

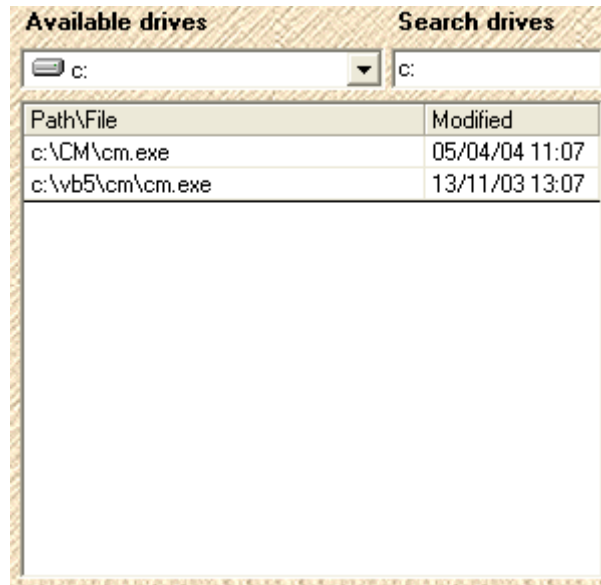


Illustration 6 : The search results

The next feature of this screen is the ability to specify which files will be included in and excluded from the backup process. The following five illustrations below display the file specifications for the modules listed.

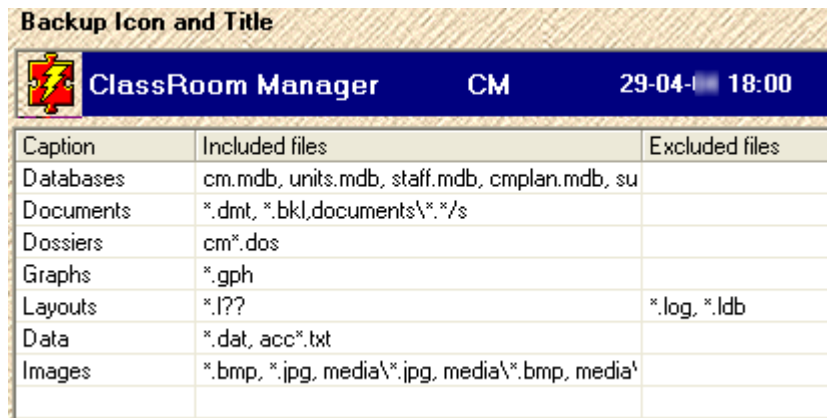


Illustration 7 : Classroom Manager file specifications

SM	Student Manager	SM	29-04-11 18:05
Caption	Included files	Excluded files	
Databases	sm.mdb,calendar.mdb,absences?????.mdb,cm	*.ldb	
SM Documents	smdocs\*.dmt,smdocsb\*.dmt,financial docum		
Other Documents	documents\*.dmt/s,documents\*.lyt/s,docume		
Staff files	staff leave documents\*.*,staff relief files\*.*,st		
Letters	letters\*.*		
Media	media\*.*		
Dossiers	sm*.dos		
Data	*.dat		

Illustration 8 : Student Manager file specifications

Using the buttons on the left side you can add your own backup specifications.

On the left side you can set some parameters which control what happens during the backup and restore processes.

## Backup

Before clicking on either the 'Backup' or 'Restore' button select the program with which you are concerned from the list on the right side of the screen.

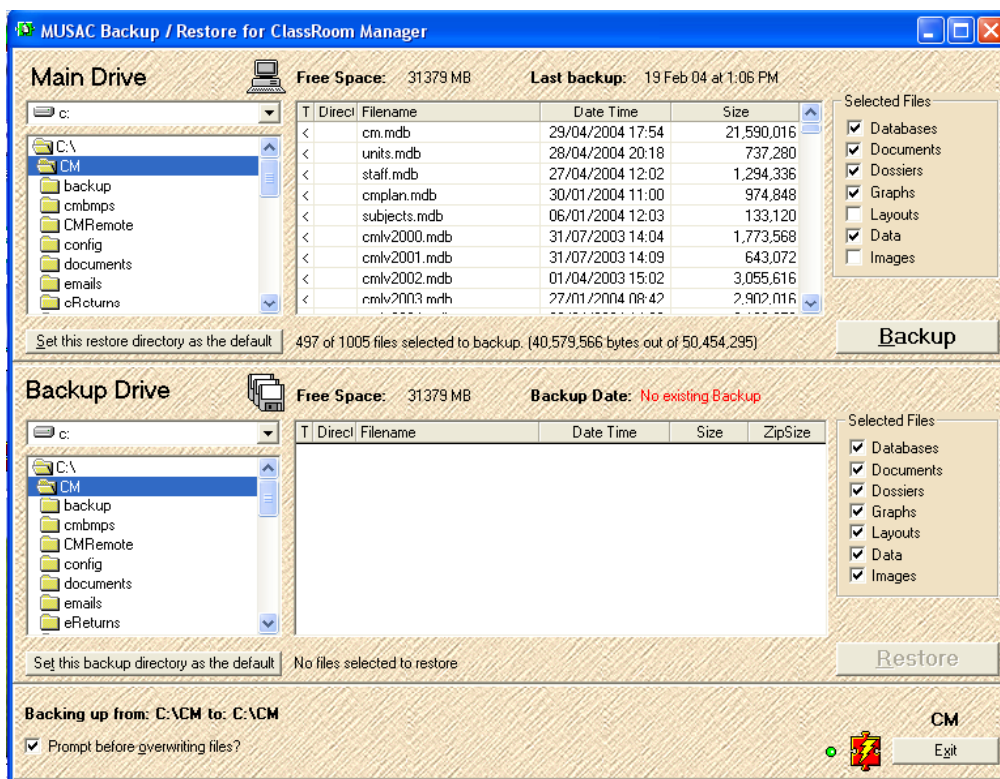


Illustration 12 : Backing up Classroom Manager

The backup screen is split horizontally into two halves. The top half of the screen displays the files relating to the selected program in its main directory and the bottom half displays the same for

Student Manager  
MUSAC Classic 2014

the backup. In the screen illustrated above there are NO files in the backup half of the screen as no backup has yet been made.

On the left side of each half you can specify the drive and directory which apply to the package and its backup and a button at the bottom of each area allows you to set these as the defaults, so that you do not have to make the selections each time you make a backup.

On the top right side you can include or exclude particular file types from the backup. Initially all files (from the specification described earlier in this chapter) are selected and, in the centre part of the screen, the individual files meeting the specified criteria are ticked (in the left hand column of the display grid).

To make the backup click on the button on the right hand side at the bottom of the top half of the screen and the backup will proceed, as shown below.

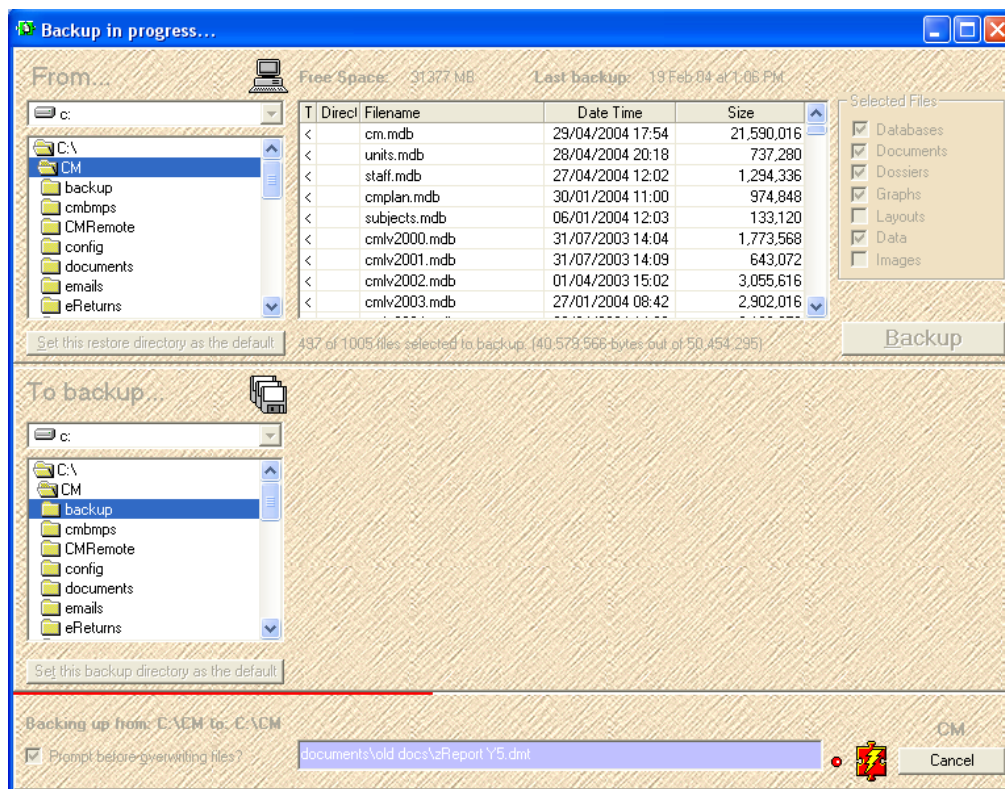


Illustration 13 : Progress during a backup

In the example the backup is being made to the subdirectory \cm\backup. This is, of course, a particularly useless place to have a backup, unless you are sure that your computer will never be subject to theft or fire and its hard drive will never suffer damage and that the computer itself will last forever.

Backups MUST be made frequently and regularly and held in a secure place away from the school.

When a backup IS made to a more sensible site then it IS first made to the backup directory and then copied from there to the requested backup drive.



**Note:** Backups CAN be made will other users are currently using the package and have the database file(s) open. The program checks to see if a database is open and, if so, then a copy of the file is made and this is included in the backup rather than the original file.

### Restore

To restore from a backup, first select the package concerned on the front menu, then click the 'Restore' button to arrive at the following screen, which illustrates a restoration of Classroom Manager. Again, the screen is subdivided into two halves horizontally. This time the top half displays the contents of the backup and the bottom half displays the contents of the directory into which the backup will be restored.

As with the backup process, you can, at the top right hand side of the screen, specify the file types which you wish to be restored and, by clicking in the left hand column of the centre display grid, you can select individual files to be restored. In the example below I have selected just cm.mdb to be restored.

To begin the restoration process, click on the 'Restore' button in the bottom right hand corner of the top half. A message will be displayed (of which an example is shown below) advising you of what you have elected to do.

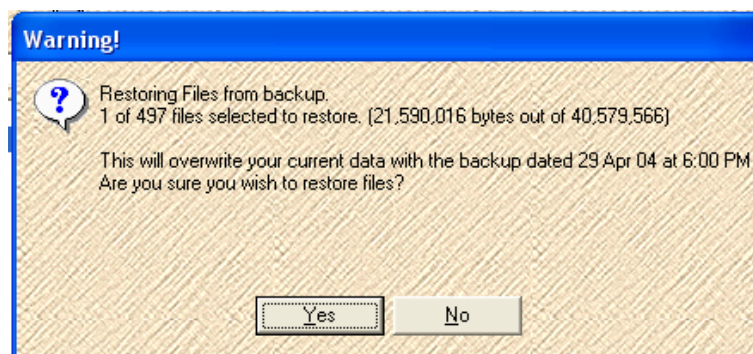


Illustration 14 : Ready to begin the restoration process

If you proceed then the first file will be extracted s shown below.



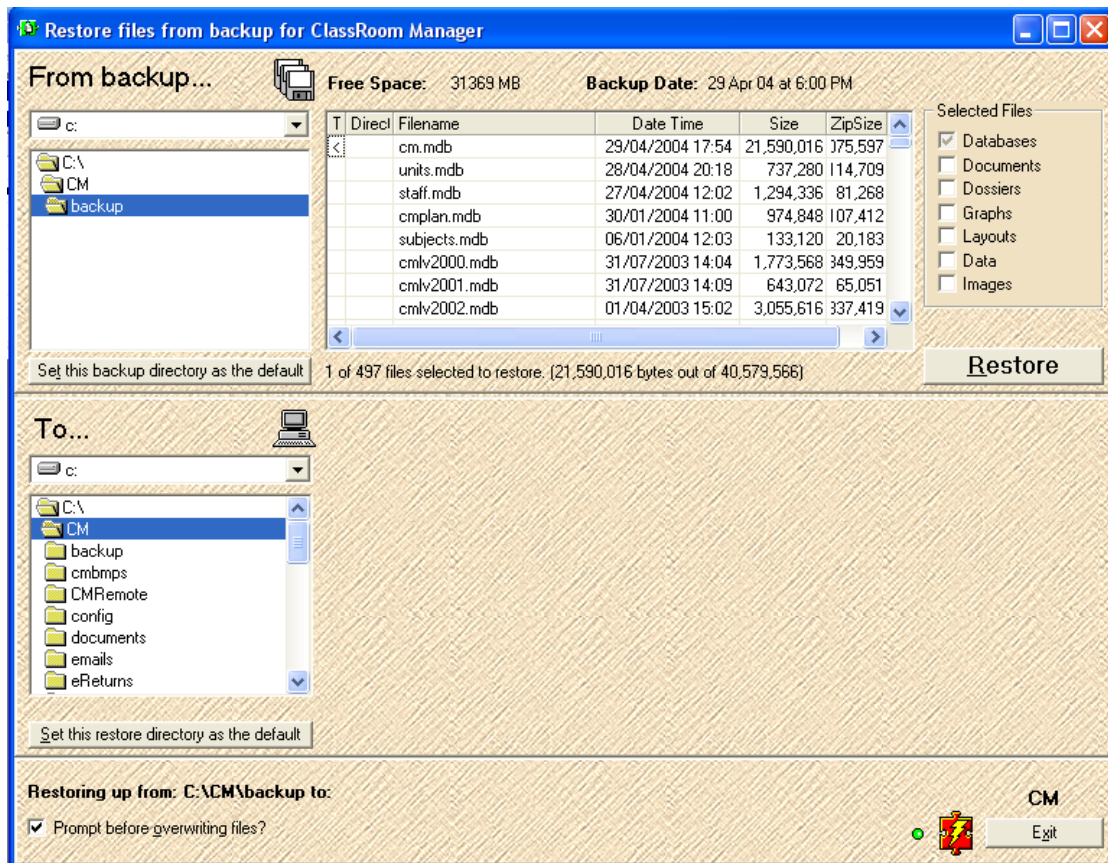


Illustration 15 : During the restoration process

If a previous copy of a restored file is found in the destination directory a message will be displayed asking whether or not you wish to proceed by overwriting the original. An example of this message is shown below.

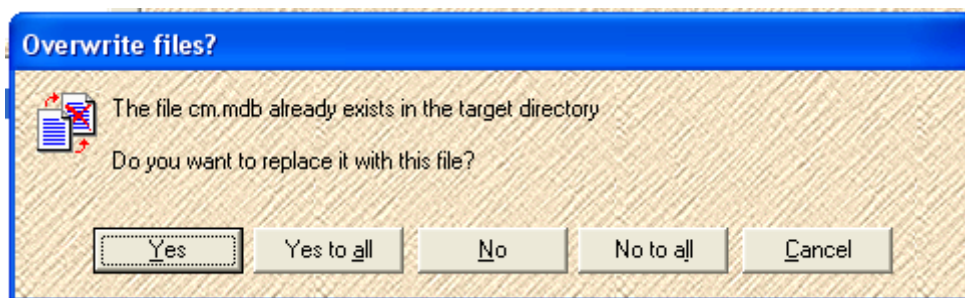


Illustration 15 : Overwrite the existing file?

The usual practice is to click the second button to avoid having this message appear for each file extracted from the backup.

**Note:** When a backup is made it is created as a series of floppy disk sized files – each approximately 1.4 megabytes in size. The majority of schools are now backing up onto pendrives.

A word or two of warning about tape backups. Many schools have an automatic system where their entire file server (or just selected files) are automatically backed up at regular intervals to a

Student Manager  
MUSAC Classic 2014

tape backup machine. This is great and excellent but please ensure that you have someone in your school who knows:

- the password to the backup restoration process
- how to perform the process
- how to extract a single file from the general backup

Backups are entirely useless unless they can be used in an emergency.

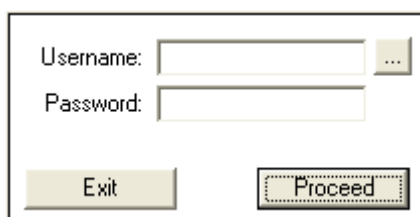
## 25 Appendix 3 - The Password Utility

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The MUSAC generalised backup utility can be accessed from the sign-on splash screen provided that you have the necessary right to access this utility.

### 25.1 Using the password utility

After entering your entry code and your password a small button will appear to the right of the entry code area. The entry code and password of the demonstration user have been erased from the illustration as shown below.

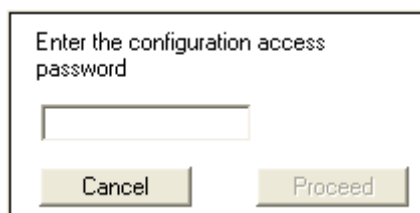


The screenshot shows a sign-on form with two input fields: 'Username:' and 'Password:'. To the right of the 'Username:' field is a small button with three dots (...). Below the fields are two buttons: 'Exit' and 'Proceed'.

Illustration 1 : Accessing the password utility

Click on the small button and you will be asked to enter the special access password for this utility. This password is not published and may be obtained, given suitable proof of identity, from MUSAC Software Support on 0800 600 159.

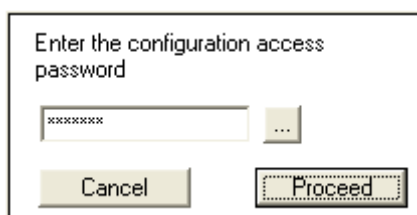
The password request screen is shown below.



The screenshot shows a dialog box with the text 'Enter the configuration access password' above a single input field. Below the field are two buttons: 'Cancel' and 'Proceed'.

Illustration 2 : The request for the special password

Enter the special password and a further small button will appear, as shown below.



The screenshot shows the same dialog box as in Illustration 2, but the password field is now filled with asterisks (xxxxxxx). A small button with three dots (...) has appeared to the right of the password field. The 'Cancel' and 'Proceed' buttons remain at the bottom.

Illustration 3 : A further button to change the special password

Clicking this further button takes you to a screen where you can enter your own password to provide access to this utility. Please ensure that this password is recorded somewhere safe and

secure (and memorable) as the special entry password will no longer work once you have made the change.

Enter a new access password

XXXXXXXXXX

Cancel Proceed

Illustration 4 : Changing the special password

Once you proceed to the main utility screen, shown below, you will have a number of functions available and decisions to make.

Encryption: MUSAC Standard

Minimum length: 1 characters

Re-usable: Always

Expires: Never

User can change password

New user must change password

3-Try lockout

Case-sensitive

Must contain Alpha and Numeric

Default password: default

Cancel Utilities Proceed

Illustration 5 : The main utility screen

Firstly, encryption. MUSAC has its own rather sophisticated password encryption routine. However, the Ministry of Education have indicated that they prefer an even more complex process known as 'Blowfish encryption' (128-bit encryption). You have the choice of the two, via the first pulldown, as shown below.

Encryption: MUSAC Standard

Minimum length: MUSAC Standard

Blowfish (128-bit)

Re-usable: Always

Expires: Never

Illustration 6 : The Encryption possibilities

The second decision concerns the minimum length of your passwords. This is specified via another small pulldown as is the third entry – Reusable. You can specify the number of changes of password which must occur before a previously used password may be reused.

The 'Reusable' possibilities are shown below.

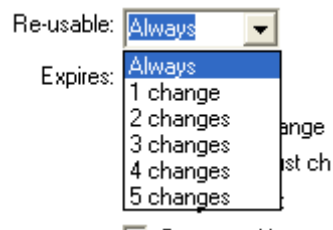


Illustration 7 : The reusability possibilities

The final pulldown allows you to specify the number of days for which a password will remain active before requiring re-specification. These are shown below.

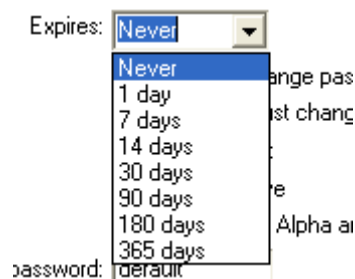


Illustration 8 : The expiry time possibilities

There are several further options :

- User can change their personal password  
Each person will have the right to change their own password
- New user must change password  
Each new user MUST change their initial password before they can proceed.
- 3-try lockout  
After three attempts a user is blocked out from further attempts.
- Case-sensitive  
If it is case sensitive then the program will distinguish between upper and lower case and passwords would have to match case exactly.
- Must contain alpha and numeric  
If set then any password MUST contain both alphabetic and numeric characters.

The 'Utilities' button provides a list of all of your staff members and various details relating to their access. You can alter their passwords for them on this screen, and change the lifetime of their password). This screen is shown (in a stretched format) below.

Code	Surname	Firstname	Username	Password	Date	LifeTime	Life
AL	Aitken	Alan	BLACK	pword	29/10/2003	0	Eternal
AS	Ashton	Scott	ASHTON	pword	29/10/2003	0	Eternal
BA	Baumfield	John	HOOGENDOORN	pword	29/10/2003	0	Eternal
BT	Butler	Rory	Butler	rory	29/10/2003	0	Eternal
CL	Clarke	Lorraine	CARON	pword	29/10/2003	0	Eternal
DV	Davenport	Dennis	DAJI	pword	29/10/2003	0	Eternal
DG	Diggins	Sharon	DARRAGH	pword	07/05/2004	0	Eternal
DN	Downes	Michelle	DASS	pword	25/10/2003	0	Eternal
DY	Dyer	Jenny	DYER	pword	20/04/2004	0	Eternal
EG	Eggleston	Annie Della	Eggleston	deòñé	5/10/2003	0	Eternal
FO	Fraser	Oliver	FRASER	pword	20/04/2004	0	Eternal

Illustration 9 : Viewing all users' details

If the ability for users to change their own passwords has been switched ON then, as a user enters his or her password and presses <Enter> a second small button will appear to the right of the password entry area. This is shown below.




Illustration 10 : The password change button

If a user clicks this button then the following screen appears, via which he or she can enter their new password.

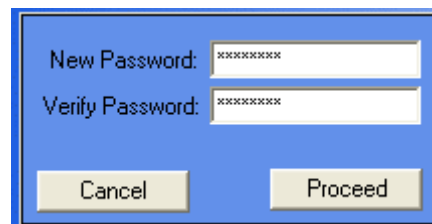


Illustration 11 : Changing your own password

A 'Super user' password is also available, should you forget your own password. This changes each day and the current day's password can be obtained from MUSAC provided that your right to access the package can be established and verified.

## 26 The Student Filter

### 26.1 Using the student filter

Frequently throughout Classroom Manager and Student Manager you need to reduce the number of students displayed from the whole school to just (for example)

- a single year level
- a single class
- a single ethnic group
- those with a certain range of marks in a certain column
- or any combination of possibilities.

This is done using the student filter which appears, when called, as a series of tabs offering various possibilities and a 'Proceed' button.

**Please note:** filter logic is OR within each list or section and AND between sections. Thus we could set a filter to find those students who are in (Year 3 OR year 4 OR year 5) AND (Rm2 OR room 3) AND who are (Maori OR Polynesian OR Asian) AND (whose score in Maths PAT year 3 Class Percentile is > 50)

Let's now look at each of the tabs of the student filter to examine the possibilities which they offer.

#### *Tab 1 Years, Horizontal classes and Vertical classes*

This tab will be automatically renamed to include the titles which you have given these groupings e.g. 'Years Forms Groups' or 'Years Classes Rooms'

Options	NZQA Standards	Schools	Activities	Mark Books
Years Forms Groups	Gender, Place & Ethnicity	Columns	Type	
Years	Selected Forms	Selected Groups	Status	
Year 9	10AK 11PT 9KA	long	Full time	
Year 10	10AS 11RA 9ML	VF1	Part time	
Year 11	10ED 12CJ 9NU	VF2	Leaver	
Year 12	10FD 12MA 9PE	VF3	Pre-enrolment	
Year 13	10JS 12MC 9ST	VF4	Delete	
	10MK 12QA			
	11DN 12TH			
	11DV 12WS			
	11HP 13AD			
	11MO 13SK			
	11PA 9HG			
	11PK 9HU			
				Reset the filter to just Full and Part time students

Illustration 1: Tab 1 – Years and class groupings

As the most frequent filters used are those to select an individual year or class group, the student's status is also included on this tab and is always set, by default, to include full-time or part-time students.

The three lists show students' years, horizontal classes and vertical classes respectively. You can multi-select without holding down the Ctrl key.

There is also a button on this screen to clear the present filter (on all tabs) and reset to just full- and part-time students.

### Tab 2 – Gender, Place and Ethnicity

On this tab, shown below, you can select the student's gender, their place in the family, and their ethnicity using either the 'MOE five' or the full range of MOE ethnicities.

Illustration 2: Tab 2 – Gender, Place and Ethnicity

Several years ago the Ministry of Education required that students ethnicities be returned as one of the five possibilities shown in the 'MOE five' list. Since then they have expanded their definitions to those on the right hand side of the tab, but school frequently prefer to use the 'MOE five' when doing a high level analysis. For more detailed ethnic analysis you could use the right hand possibilities.

The 'Place in family' choice is restricted to just 'Eldests' and 'Non-eldests' if you are using Classroom Manager. If you are using Student Manager then this choice is expanded, as shown below.

Illustration 3: Student Manager 'Place in family' options

Student Manager offers a wider range of possibilities than Classroom Manager.



### Tab 3 – Columns

The third tab, shown below, allows you to specify a wide range of possibilities concerning the data stored in columns.

You may set up several possibilities and, in this instance, you are able to determine the logic between entries for yourself, using the AND / OR choice on the right hand end of the screen.

In the example below the filter is being set to 'Class Stanine Maths Yr 9' > 50.

This is done by using the column picker on the left to identify the column the contents of which you wish to test, then selecting a condition from the pulldown (shown above) and finally entering the expression to be tested in the right hand column.

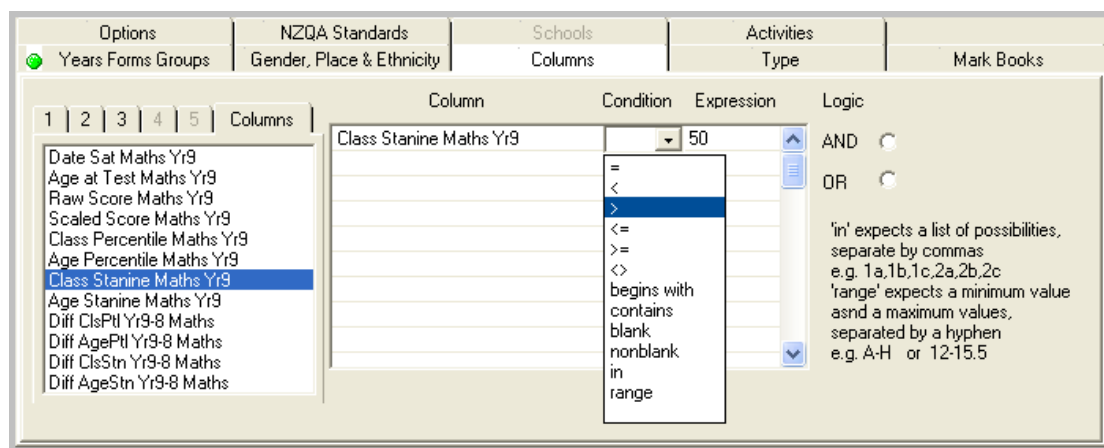


Illustration 4: Tab 3 – Columns

**Please note the text on the right of the screen:** if you select the condition 'in' then the 'Expression' field can contain a list of comma-separated possibilities e.g. 1a, 1b, 2a, 2b, 2c. If you select the condition 'Range' then the "expression" field expects two values separated by a hyphen eg. A-H or 12-15.5. Note that BOTH ends of the ranges are INCLUDED when a student's result is checked to see if it falls within the range.

### Tab 4 - Type

The Ministry of Education provides a list of types and each student must belong to one of these categories. In the example below the filter is being set to select those students who are either 'Regular students' or 'External students'.

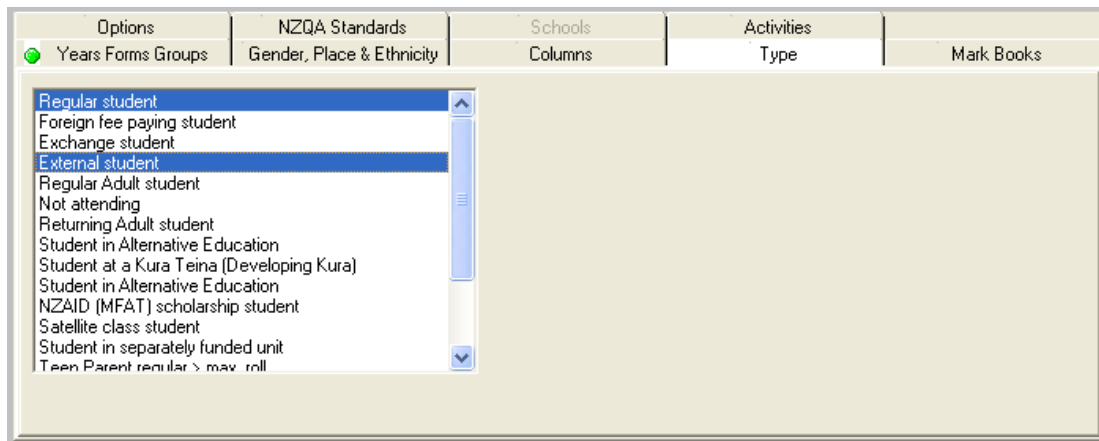


Illustration 5: Tab 4 – Type

### Tab 5 – Options

You can filter for students who are members of one or more option classes using the tab shown below.

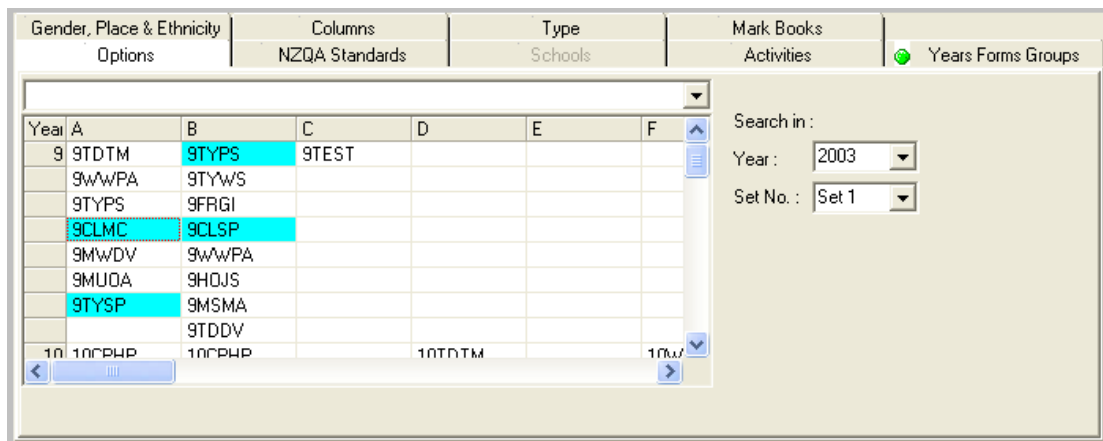


Illustration 6: Tab 5 – Options

You can select both the year and the option column set on the right hand side of the screen then multi-select the various options within that set. You cannot select from more than one set in a particular filter.

### Tab 6 – NZQA standards

This tab allows you to select just those students taking a particular standard or standards, as shown below where the filter has been set to select those who have 'Achieved' standard number 90147 (version 1 Language E).

The screenshot shows the 'NZQA Standards' tab in the Student Manager. It features a list of standards on the left, a 'Result' section with radio buttons for 'Not achieved', 'Achieved', 'Merit', and 'Excellence', and an 'OR' section with a checkbox and a text input field. The 'Achieved' radio button is selected. The 'OR' section has a checkbox that is currently unchecked.

Illustration 7: Tab 6 – NZQA standards

Alternatively, click in the check box in the 'OR' frame to select just those students taking standards. If you wish to specify a particular year then type that year into the extra entry box devoted to that purpose.

### Tab 7 – Activities

This tab allows you to select those students attached to particular activities, selecting from the list of current activities as displayed in the illustration below.

In the example the students who are in the choir are being sought.

The screenshot shows the 'Activities' tab in the Student Manager. The 'Select activities from' dropdown is set to '2004'. A list of activities is shown, with 'Choir' selected. The list includes: Athletics - School Rep, Basketball - Outside Club Rep, Beach Volleyball - Outside Club Rep, Bocce - Outside Club Rep, Clay Target - Outside Club Rep, Equestrian - Outside Club Rep, Judo - School Rep, and Kilikiti - Outside Club Rep.

Illustration 8: Tab 7 – Activities

### Tab 8 – Markbooks

This tab enables you to find those students who are members of a current markbook or markbooks. Multi-select the require books from the list shown.

**Please note:** the year 9 markbooks appear AFTER the year 13 markbooks, due to the strictly alphabetic nature of the sorting within the list.

In the example below the students who are in the '9CL 2004' markbooks are being sought.

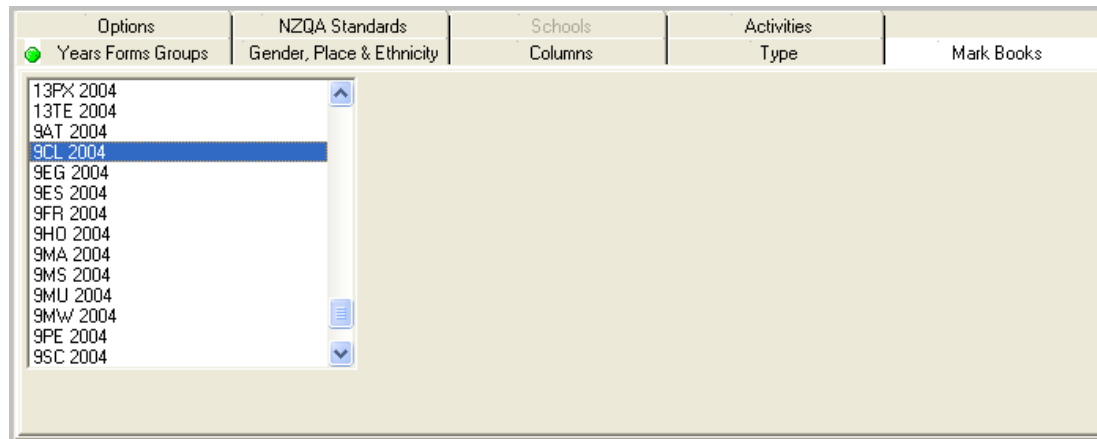


Illustration 9: Tab 8 – Markbooks

There is one further tab, disabled in the illustrations above. This is the 'Schools' tab which becomes enabled if your installation of Classroom Manager or Student Manager is in the multi-school mode. This enables you to filter just those students who are for one or more of the schools represented in your installation.

Finally, in one or two places within the package (notably in grid mode in CMTeacher) you can repeatedly use the filter to refine your selection by optionally applying the filter to the 'currently selected' group of students. The alternative is, depending on where you are in the package, to apply the filter to either the entire school or to those in your dossier's filter.

## 27 Appendix 4 – The Column Selector

### 27.1 Using the MUSAC column selector

The MUSAC column selector pops up whenever you are required to select a column. This can be when you are :

- designing a document
- designing a graph
- applying a filter to a column
- selecting an insertion code in the word processor
- applying a formula to a column

The column selector can appear slightly differently in different circumstances. Its height depends on its location (as has been set for that location within the software).

It may or may not offer special features (detailed below) such as electronic markbook columns, generic option columns and the like.

The selector appears as shown below with a series of five tabs across the top. You need only use these tabs when RETURNING to a previous selection, as will be explained shortly.

In Student Manager you will be primarily concerned with those columns which are visible via the basic documents. You can, of course display data from any other Classroom Manager columns on your SM- designed documents. The first few screen below relate to the Student Manager columns.

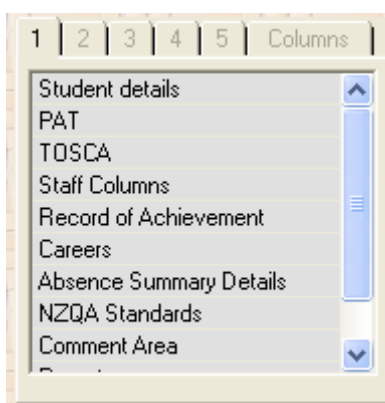


Illustration 1 : Selection of the first category – Student details

The first category, Student details, relates to Student Manager. All of the others relate to Classroom Manager columns. Click on the first category, and the second tab appears, displaying the areas covered by each of the basic documents. The (enlarged) display below shows these categories.

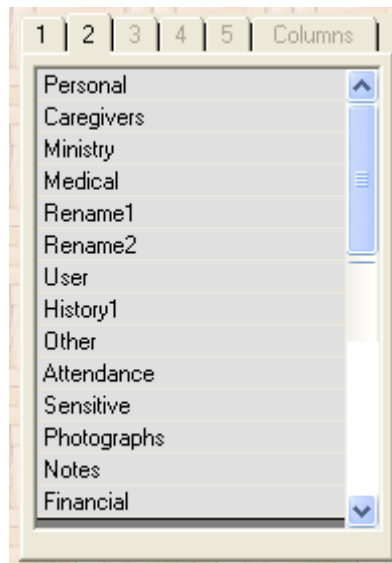


Illustration 2 : Selection of the Student Manager categories

Click on 'Personal details' to move you to the display of columns. The background of the list is no white – indicating that you have reached columns. The considerably enlarged display below shows all of the columns held under the headings 'Student details' / 'Personal'. You will recognise these as the columns displayed via the 'Personal details.dmt' document.

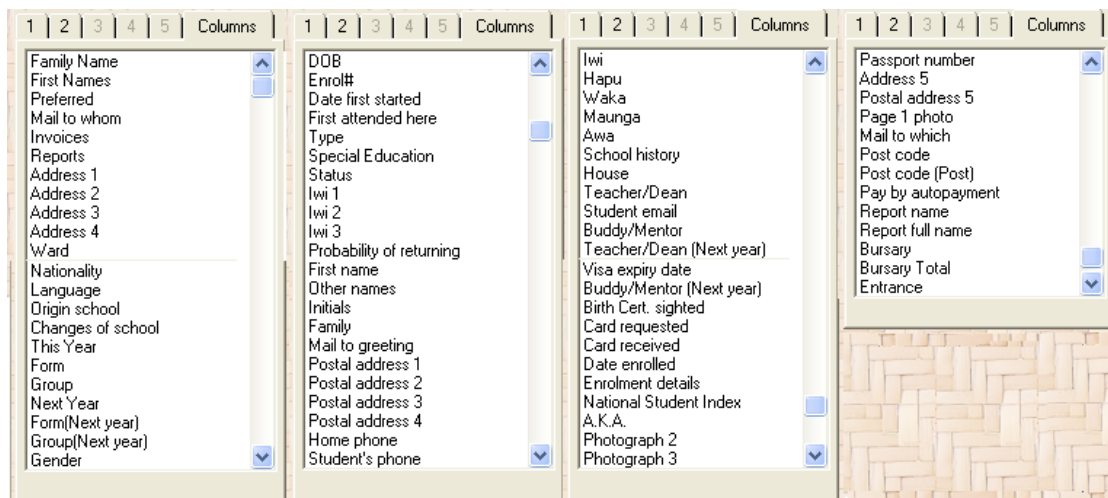


Illustration 3 : All of the student's personal detail columns

The other categories (e.g. 'Medical' etc, also reveal their own columns for selection.

We shall turn now to the Classroom Manager columns....

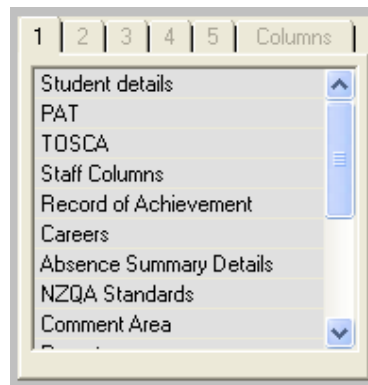


Illustration 4 : Selection of the first category

This illustration shows the column selector with those entries which your package has in the first column category displayed. When you click on one of these (e.g. 'PAT') the display will change to the relevant second category entries, as shown below.

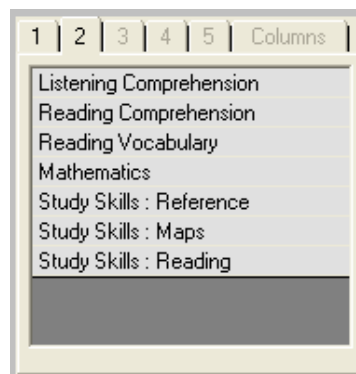


Illustration 5 : Selection of the second category

These are the PAT tests for which you have installed columns. Selecting 'Mathematics', the year categories are displayed, as shown below. If there are no subsequent categories to display then the display will list the columns available.



Illustration 6 : Selection of the third category

On selecting 'year 9' the program found that there were no Category 4 entries, so it displayed the columns installed under Year 9. The 'Columns' tab at the top of the selector indicates that you have reached columns and, by clicking on a particular column it is selected and this information is returned to the part of the program which requested your selection.

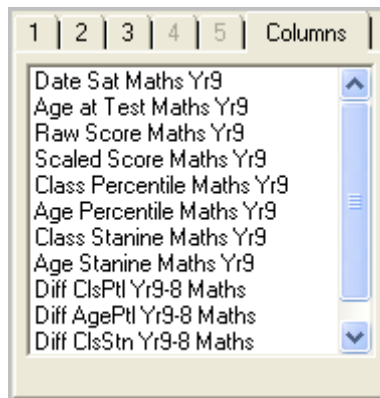


Illustration 7 : Selection of column(s)

In some areas you will be required to multi-select columns. You do this by clicking on the various columns which you require.

Remember that, if you wish to return to a previously displayed category then you do this by clicking on the relevant tab at the top of the selector.

One area of use of the column selector which differs from the others is in the selection of a column or other data relating to a markbook. Markbook columns are not normal CM columns but, using the selector, they may be treated as if they were.

To select a markbook column, return to the category 1 display and move to the last entry on that display. This is 'Electronic Markbooks', as shown below.

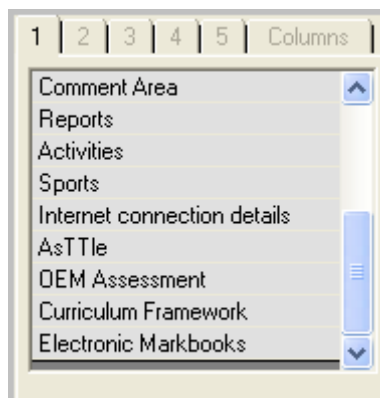


Illustration 8 : Selection of Electronic Markbooks

Click on 'Electronic Markbooks' and the list of available markbooks will be displayed, as shown below.



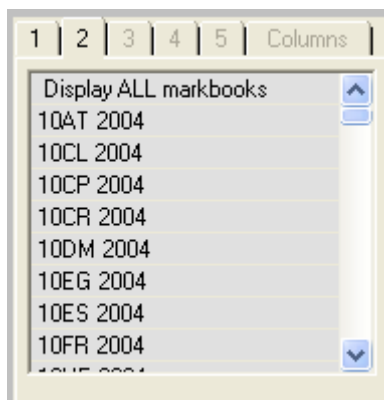


Illustration 9 : Selecting a particular markbook

If you wish to select from a markbook in other than the current year then click on the very first option and all markbooks from all years will be displayed. Select the markbook from which you wish to select a column (I've selected '11MAT 2004') and its columns will be displayed, as shown below.

Any global columns with headings will be displayed. At the bottom of the display it is possible to select Teacher column 101 through to Teacher column 200. Since these columns may or may not be defined for a particular teacher all are displayed, on the understanding that you will select a column (or columns) which have been brought into use for a particular teacher – by the naming of the column(s).

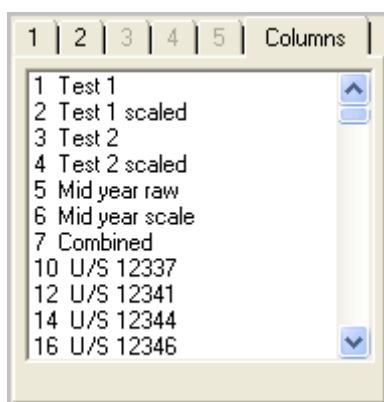


Illustration 10 : Selection of markbook column(s)

You may wish to select a column from a 'Generic Markbook'. This is done when you are designing a document (see CMTeacher manual for full details) which is to be a report document for an as yet unspecified subject. When you elect to view the document you will be asked, at that point, to nominate the markbook from which data is to be extracted. Alternatively, you may wish to place on a report data extracted from whichever markbook a particular student has in his or her e.g. A option. To do this you would select Markbook Option A from the display below.

'Generic markbook' and 'Option specific markbooks' are found at the bottom of the list of available markbooks, as shown below.

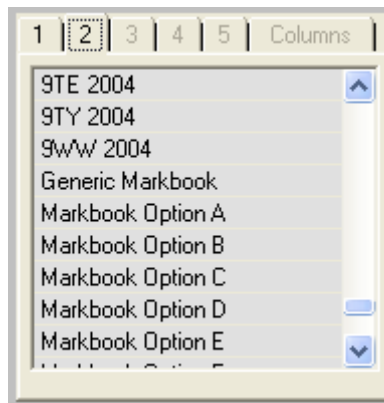


Illustration 11 : Selection of Generic or option related markbooks

Once you have selected either the 'Generic markbook' or an option specific markbook then the possible data extractions from that are shown, in an extended format (a composite screen capture for this manual) as shown below.

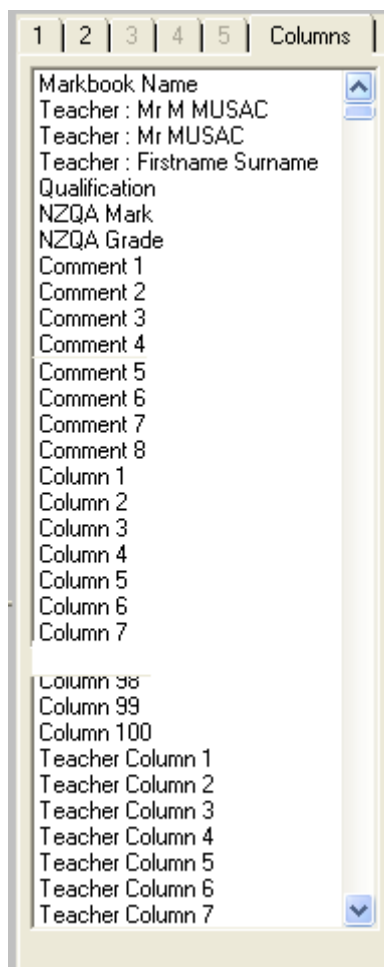


Illustration 12 : Selection of generic or option related markbook column(s)

At the top of the list is the markbook's name, along with three formats of the teacher's name and a few 'other details' stored in markbooks. These are followed by the eight columns and these are followed in turn by first the one hundred 'Global' columns (ie. those which apply to all teachers in the markbook) then the 100 teacher-specific columns.

## 28 Appendix 5 – the Word Processor Insertion Tool {A}

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### 28.1 Using the {a} tool in the word processor

One of the buttons at the top of the word processor is titled {a}.

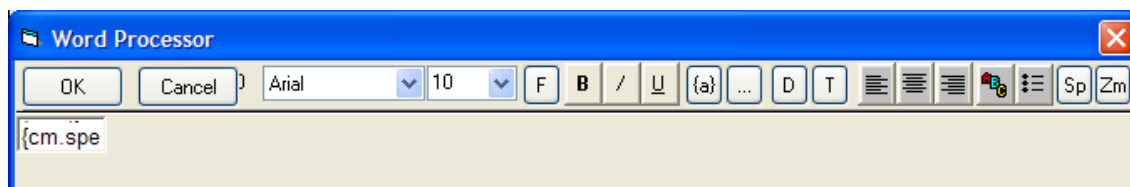


Illustration 1: The code-insertion button {a}

This tool is used to insert a code into the word processor text. When the text is printed for a particular student the code is recognised, extracted, evaluated and the resulting information is used to replace the code in the final text.

The simplest example is the use of Ctrl-N to insert the code for the student's preferred name. The code for this is 'cm.col(3)' which is translated by the software to mean 'the contents of this student's third column'. Column 3 is the student's preferred name so, when printed, that is what will replace the code.

This insertion tool offers a very wide range of possible codes across thirteen different tabs. (Not all are available unless you have Student Manager as some, e.g. Pastoral, refer exclusively to data stored via Student Manager.)

When you come to a position in the text where you wish to insert a code click on the {a} button and the code insertion tool will appear, as shown below.

Of course, in Student Manager, you will be primarily concerned with insertions relating to Student Manager data. Four tabs are used for these insertions and these will be discussed first, and then we shall move to the Classroom Manager tabs. In CM the SM tabs are not visible.

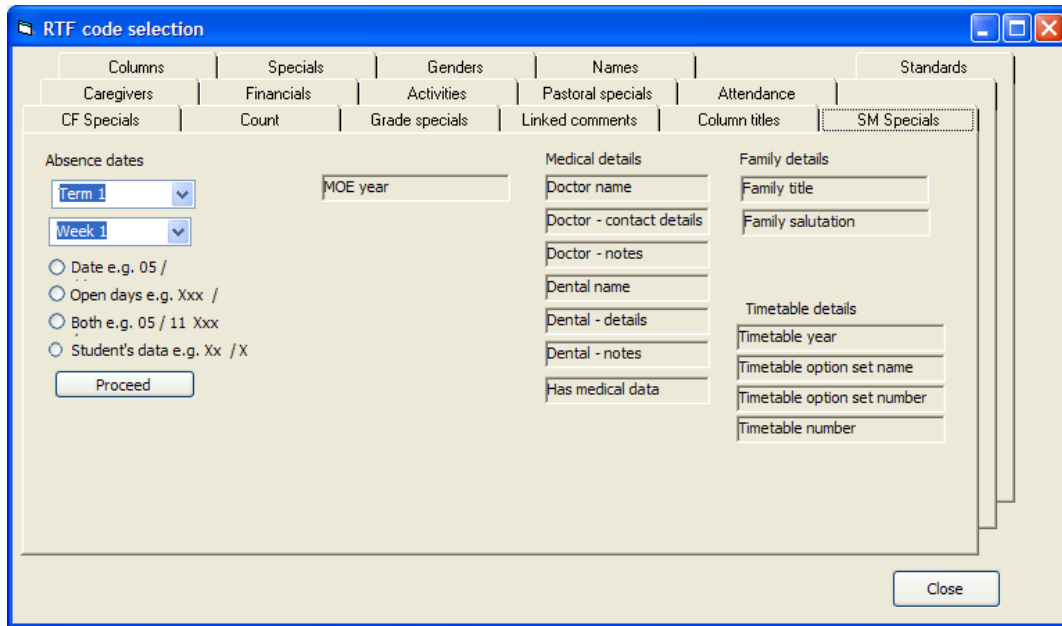


Illustration 2 : Student Manager 'Specials'

There are only a few specials. These are displayed above.

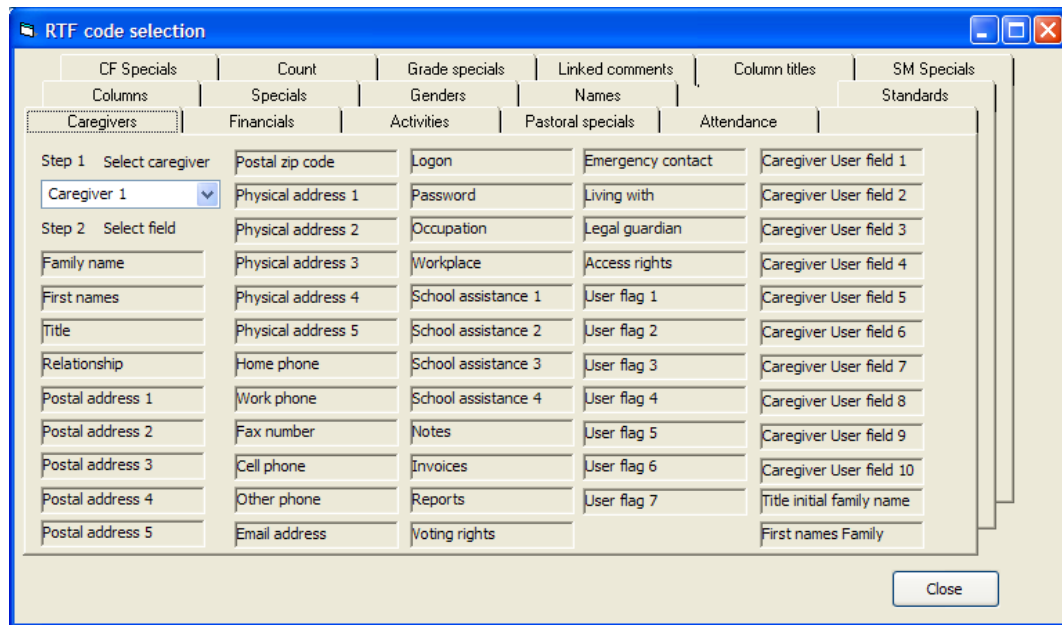


Illustration 3 : Caregivers

To insert a caregiver code, first select the required caregiver from the popuplist in the top left hand corner of the screen, then click on the relevant label to insert code for the selected detail.

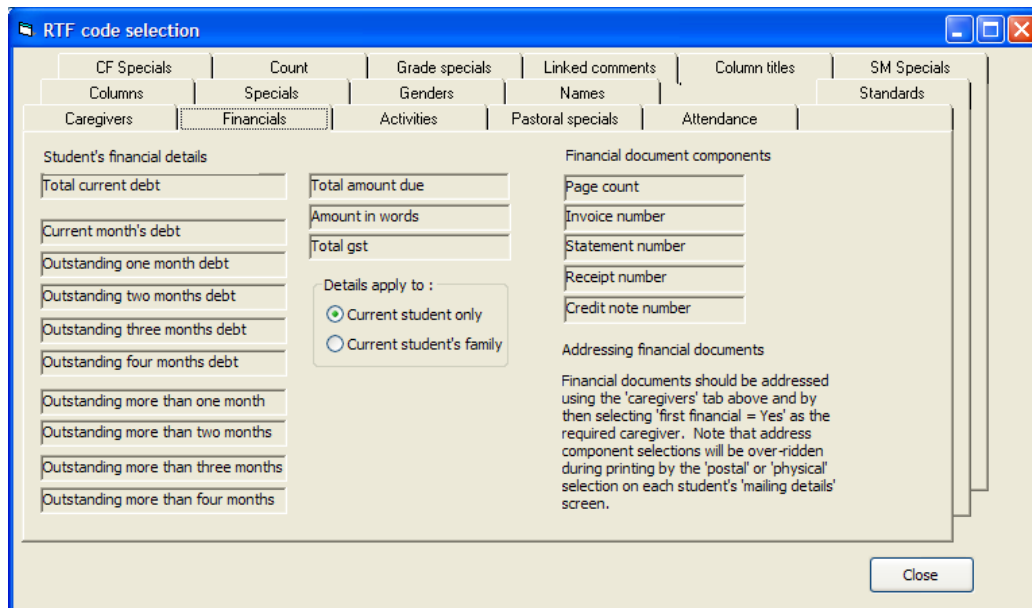


Illustration 4 : Financials

The financial specials are shown below and they enable you to incorporate into any document any of the possibilities shown above, e.g. the student's total current debt. Some of those on the right hand side of the screen are used particularly in financial documents – receipts, invoices and statements.

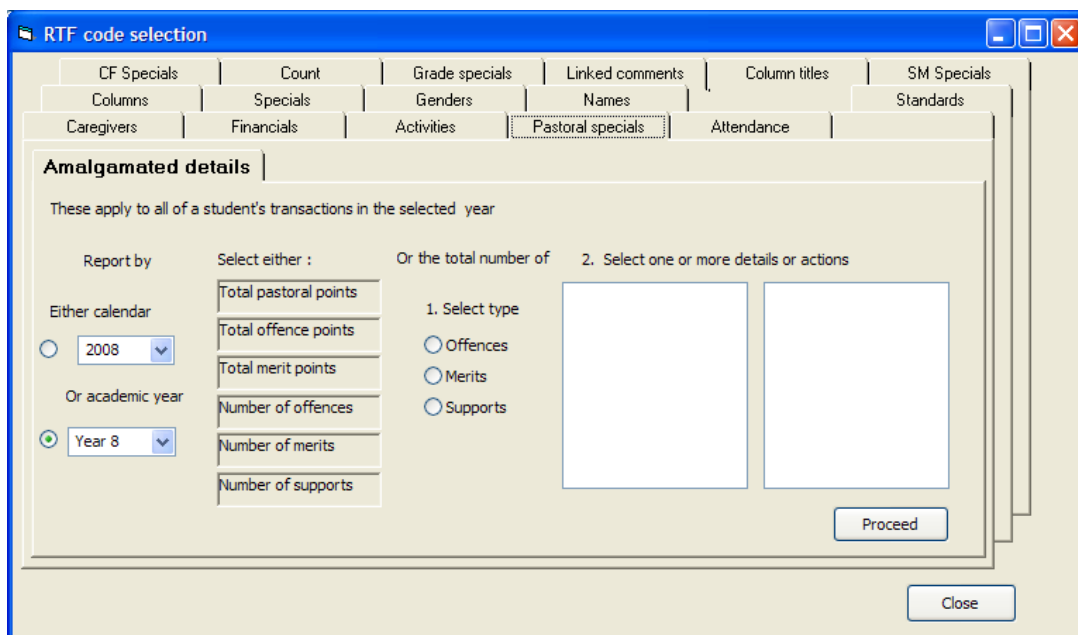


Illustration 5 : Pastorals

The final tab (for users of Student Manager only) allows you to design a document relating to a particular pastoral transaction. These are used in the 'Pastoral' area of Student Manager for designing a letter home relating to a particular offence – e.g. the 'Smoker's letter'.

A pastoral letter can be printed from within the pastoral section of Student Manager and the letter will relate to the transaction currently being viewed there.

We turn now to the Classroom Manager tabs which can, of course, be used in letters or documents designed via Student Manager.

## Columns

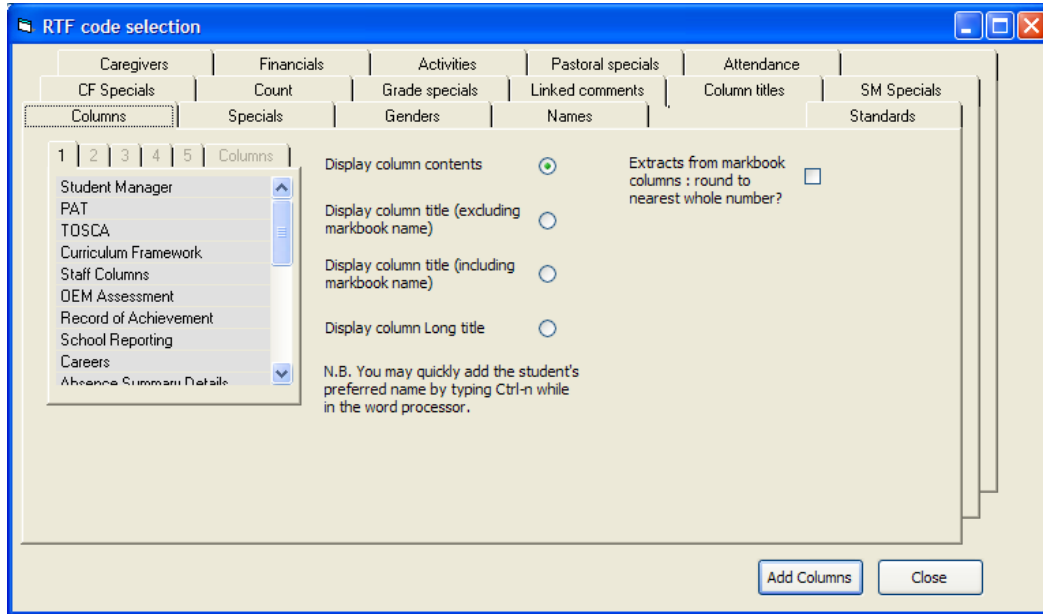


Illustration 6 : Selection of data from columns

The simplest use of this tab is to insert the data held in a column for the current student. To do this simply select the column from the column picker on the left of the screen.

Alternatively, if you wish to insert the column title (including or excluding the name of a markbook from which you might be selecting a column), or the column long title, then you should first select which of these you wish from the options in the centre of the screen BEFORE selecting the column concerned.

To select a column from a markbook, first select 'Electronic Markbooks' from the column picker. This will display the current markbooks. Select one of these and its named columns will be displayed. Select one of these and (slightly complex) code will be embedded in your text. A composite screen capture of these steps is shown below.

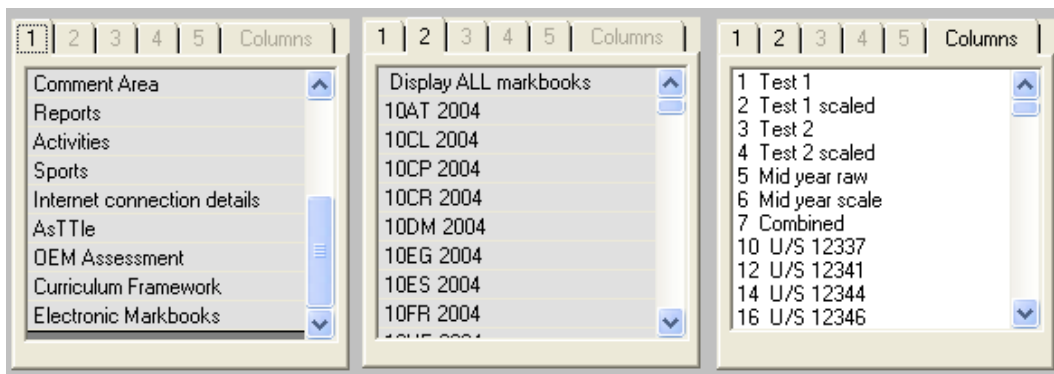


Illustration 7 : Selection of a markbook column

If you wish to select from a markbook other than the current year, select 'Display all markbooks' from the top of the centre column above.

Alternatively you might wish to display data from a column in an as yet unnamed markbook. This is done when you are designing a generic report for an unspecified subject. The subject is not selected until you come to view or print the report. In this case you would select 'Generic Markbook' which appears after the last markbook name in the second column. After this you can select from the various possibilities shown in the right hand side of the illustration below.

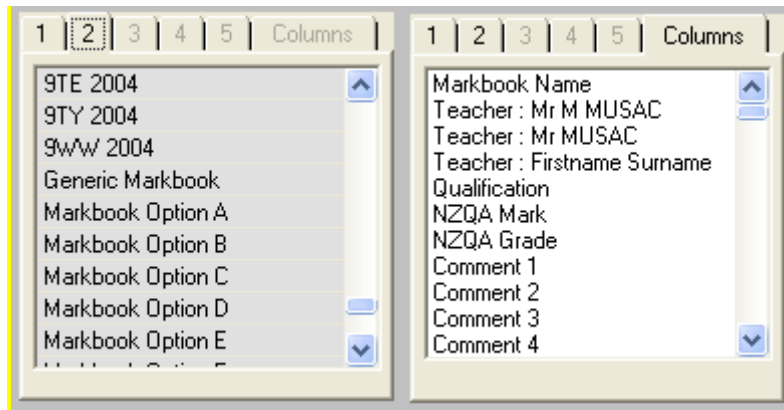


Illustration 8 : Selection of a generic or option-specific markbook column

There is a third possibility to do with markbooks. You can design a report for the 'subject in the D option line' whatever that might be for a particular student. To do this select from the 'Option specific' possibilities at the bottom of the left hand column in the illustration above. Then you may select from the same range of possibilities shown in the second part of the display. This includes the markbook name (i.e. the 'Report name' as specified in the markbook definition), the teacher's name (in a variety of formats), a report comment, or a column.

### Specials

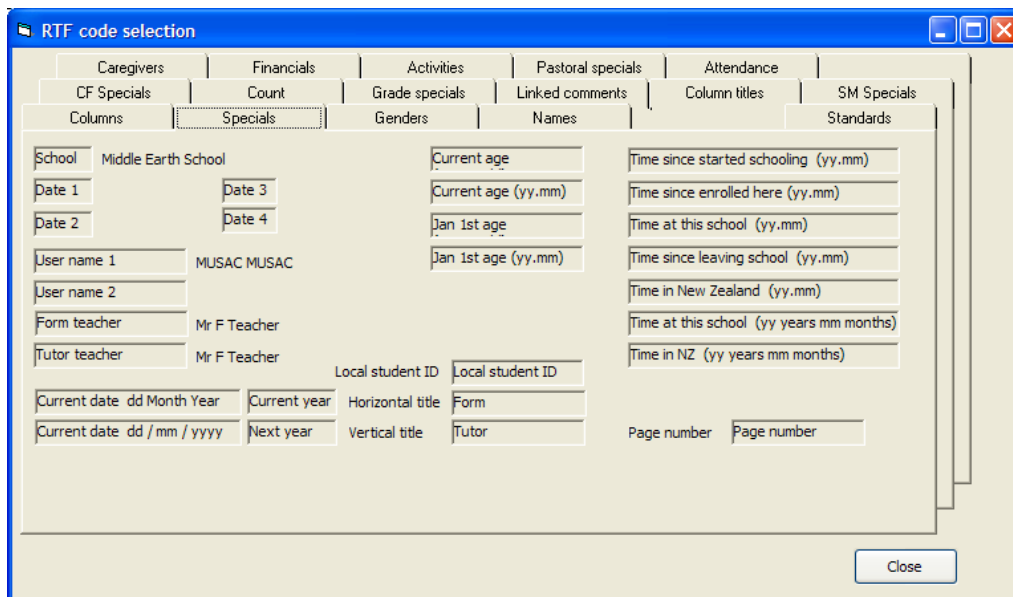


Illustration 9 : Specials

Specials are displayed on the tab above. They include some information derived from data held in columns (e.g. the 'Time at this school' is derived from the current date and the student's 'Date first started here') and other information (e.g. Date 1, Date 2) which are specified in the configuration area of the package.

## Genders

We last met genders when dealing with report comments. These are replaced by the gender-specific equivalent depending on whether the student concerned is male or female.

If you are a single sex school then, of course, you will not have to use these codes. If you wish to insert the code for 'her' then use the code for the male equivalent. 'her' is strange as it has two male equivalents. Consider 'It is his ball so I gave it to him' and 'It is her ball so I gave it to her'.

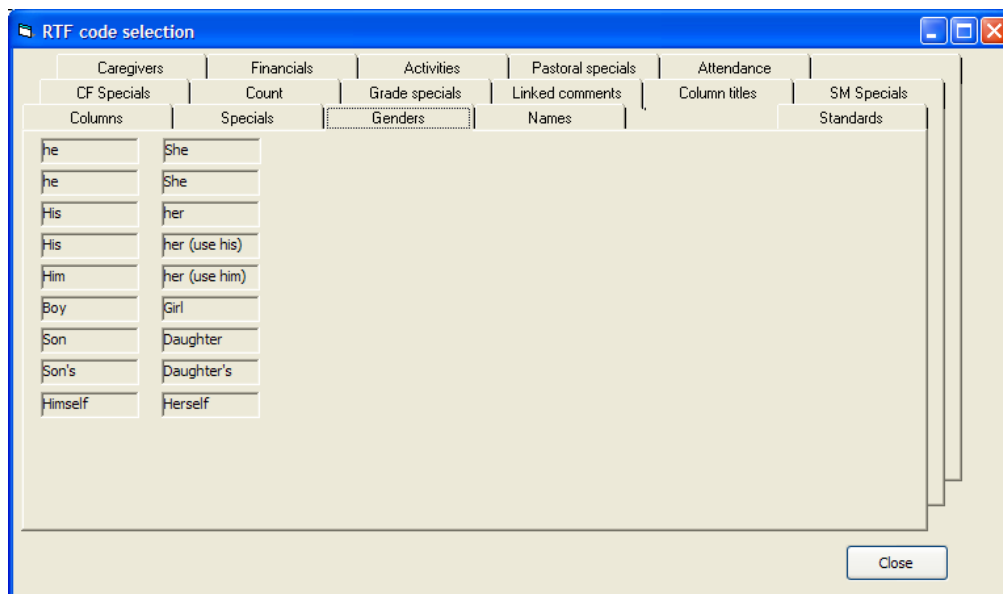


Illustration 10 : Gender insertions

## Names

This allows you to insert one of the four possibilities shown below.



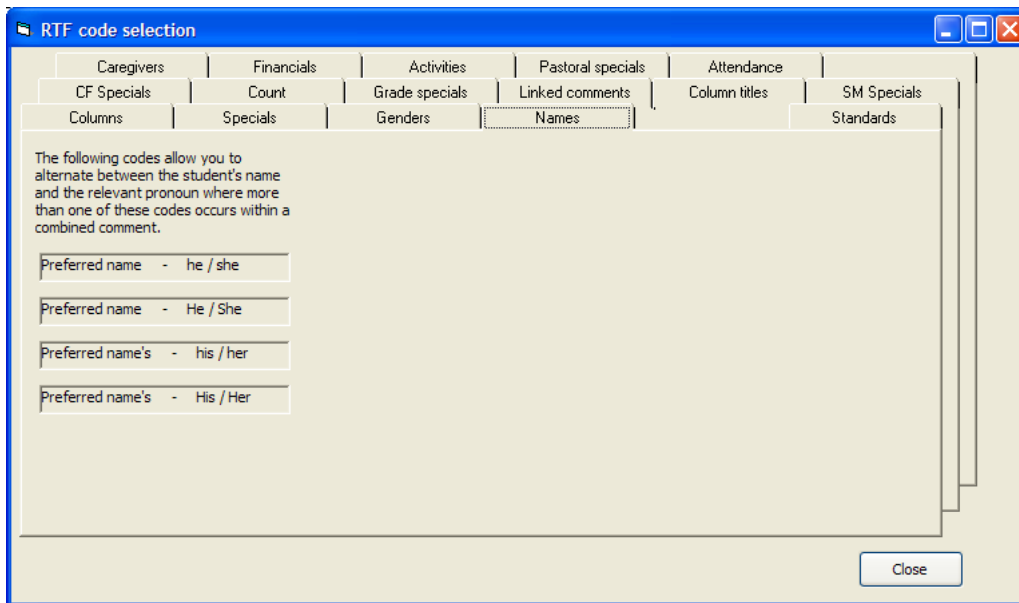


Illustration 11 : Name insertions

The fast way to insert the first of these has been mentioned earlier. You do not have to click on the {a} button and select this tab. Just press Ctrl-N while in the word processor itself.

**Please note:** in a combined comment where the preferred name is repeated in several comments it will automatically be replaced by the relevant pronoun (he or she) on every second occurrence.

## Standards

These apply to unit standards and achievement standards taken by the student and the tab has two sub tabs.

The first, shown below, allows you to insert a number relating to the label which you click. This could be, for example, the total number of Level 3 units attempted, or the total credits gained at level 2, or the number of Level 1 Literacy credits gained.

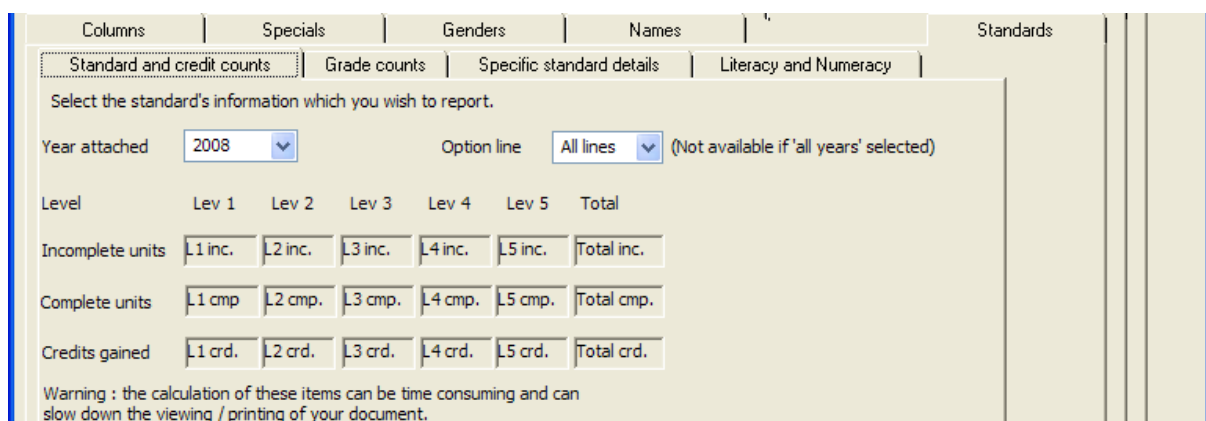


Illustration 13 : Number from standards

The second 'Standards' tab is now obsolete as far as its original intention was concerned. This was in earlier days when unit standards were subdivided in elements and these into performance criteria.

The possibilities do still have a place however if you wish to insert the code, short title, long title etc of a particular standard.

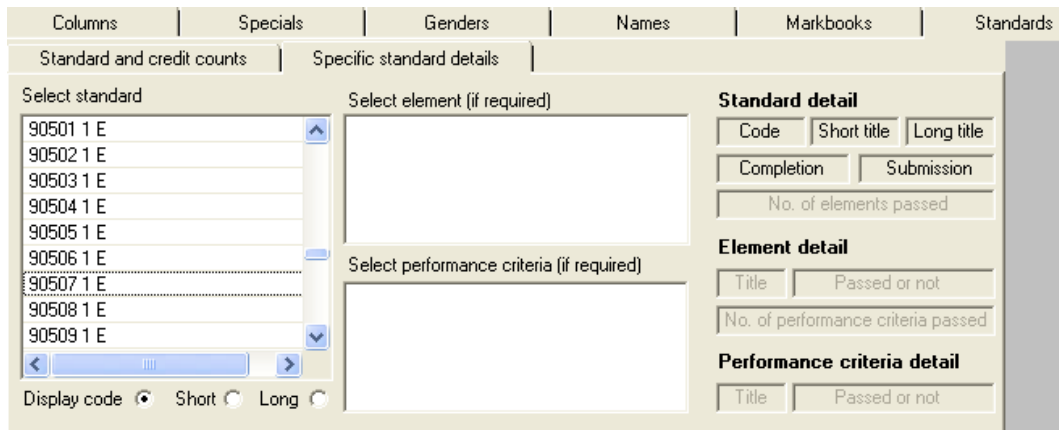


Illustration 14 : Standard codes

### Curriculum Framework specials

These are not student specific. They allow you to count the number of students who have reached one of the levels of attainment which you have configured for your school for the curriculum framework objectives.

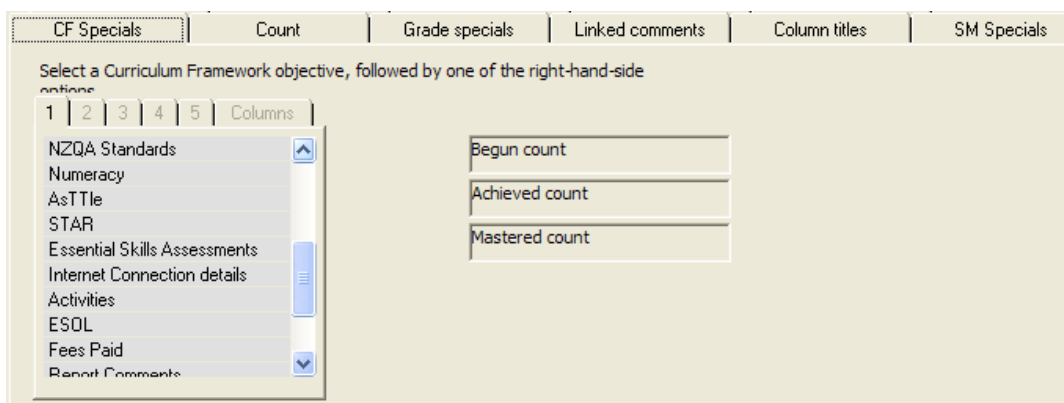


Illustration 15 : Curriculum Framework specials

Select the objective (under 'Curriculum Framework' in the column picker, followed by one of the possibilities on the right hand side of the screen above.

### Count specials

This area allows you to count the number of students who satisfy a particular criteria and to have the resulting number reported in your document.

Illustration 16 : Grade specials

In the example above, the document will report the number of students who have scored less than 20 in their PAT Maths Yr 9 Scale Score Maths.

### Grade specials

This area is very similar to the previous one. First select the column, followed by the entry to be counted (which may be a range – see the note on the screen below), and finally click on the operation you wish to have performed :

Count the number of students with the specified entry or in the specified range

Calculate the percentage of students with results which meet the same criteria.

Illustration 17 : Grade specials

### Linked comments

This area allows you to insert a comment into the text where that comment depends on the result which the student has in a particular column.

You must set up the possibilities in the screen below by first selecting the column then specifying the range of possible entries in that column along with the text which you wish to appear in the document if the student has the matching result.

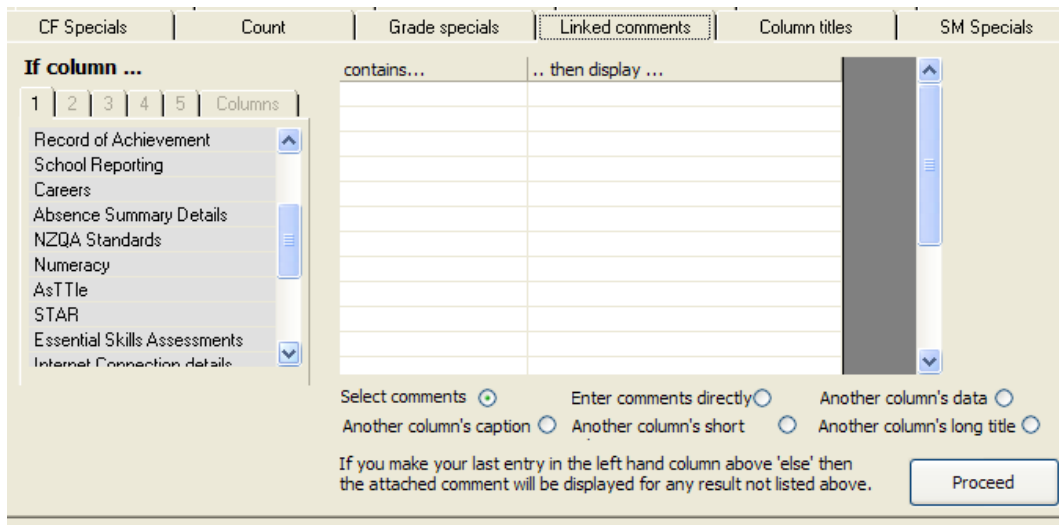


Illustration 18 : Linked comments

## Column titles

This area inserts into the document the basic title or the long title of the selected column. It would be easier to type the required text into the word processor.

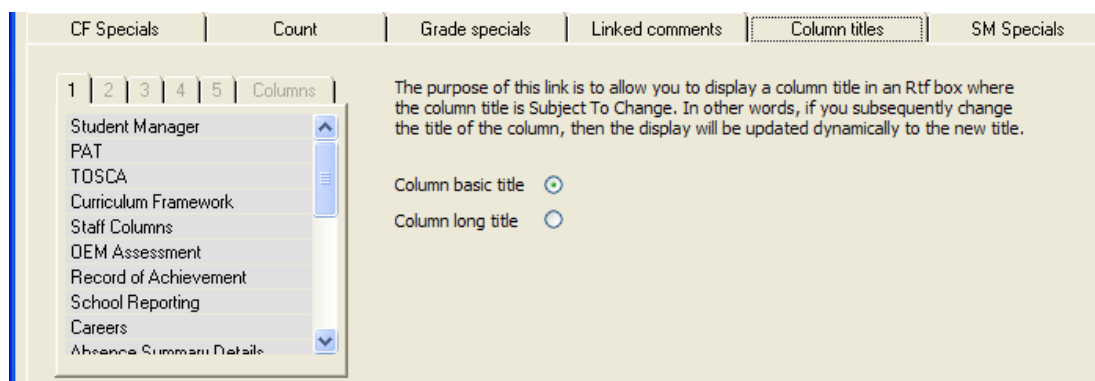


Illustration 19 : Column titles

## Activities

The section allows you to return a reasonably complex text extract related to the current students activities.

Select either the calendar year or the student's year as required, followed by the category required then tick on the option which you require.

Caregivers | Financials | **Activities** | Pastoral specials | Attendance

Activities list

Select according to

Either calendar year ...  
 2008

... or academic year  
 Year 8

...And category [dropdown]

Include awards information   
 Include tagged columns   
 Include tagged column headings

Printing format :  
 No line feeds - all in one line   
 Each activity in one line   
 All separate lines

Counting activities  
 Just select the year and the category(s) then click the message below

Just count the number of activities in which the student is involved

Use These Activity Settings

Illustration 20 : Activities

This will generate a summary related to the student the format of which will depend on the setting you select from the three possibilities displayed above :

- No line feeds – all in one line
- Each separate activity on one line
- All activities and their component details (eg. awards) on separate lines.
- This is intended to form part of eg. a student's leaver documentation.
- A new possibility is to report just the total NUMBER of activities taken by the student.

### Pastoral

The next tab has two possibilities. If you are using Student Manager to design a Pastoral document then there will be two tabs available. The first, shown below, allows you to design a document relating to the currently selected pastoral transaction. These are used in the 'Pastoral' area of Student Manager for designing a letter home relating to a particular offence – eg. the 'Smoker's letter'.

Caregivers | Financials | Activities | **Pastoral specials** | Attendance

**Amalgamated details**

These apply to all of a student's transactions in the selected year

Report by

Either calendar  
 2008

Or academic year  
 Year 8

Select either :

Total pastoral points  
 Total offence points  
 Total merit points  
 Number of offences  
 Number of merits  
 Number of supports

Or the total number of

1. Select type  
 Offences  
 Merits  
 Supports

2. Select one or more details or actions

Proceed

Illustration 21 : Pastoral insertions

A pastoral letter can be printed from within the pastoral section of Student Manager and the letter will relate to the transaction currently being viewed there.

Otherwise if you are designing an ordinary document, only the following tab will be available to you.

Illustration 22 : Pastoral counts

Firstly, select the year (calendar or academic) to extract information. This is done at the top of the screen, as shown above.

Secondly, you can either select one of the 'Total calculations' from the left hand side of the screen, or you can choose offences, merits or supports in the middle of the screen, followed by one or more from either the associated details list or actions list.

You can use this to report, for example, how many detentions a student has had in the nominated year, or how many times he has been caught smoking or using drugs. Selecting more than one from a list generates a combined total. You may only select from one of the two lists at a time.

**Please note:** if you are using Student Manager this information will be extracted from the relevant part of that database.

### Caregivers

In Classroom Manager you can now extract information relating to a particular caregiver – or eg. the first emergency caregiver, or the first with their 'Financial' flag set to 'Yes'. The screen via which these extracts are available is shown below.

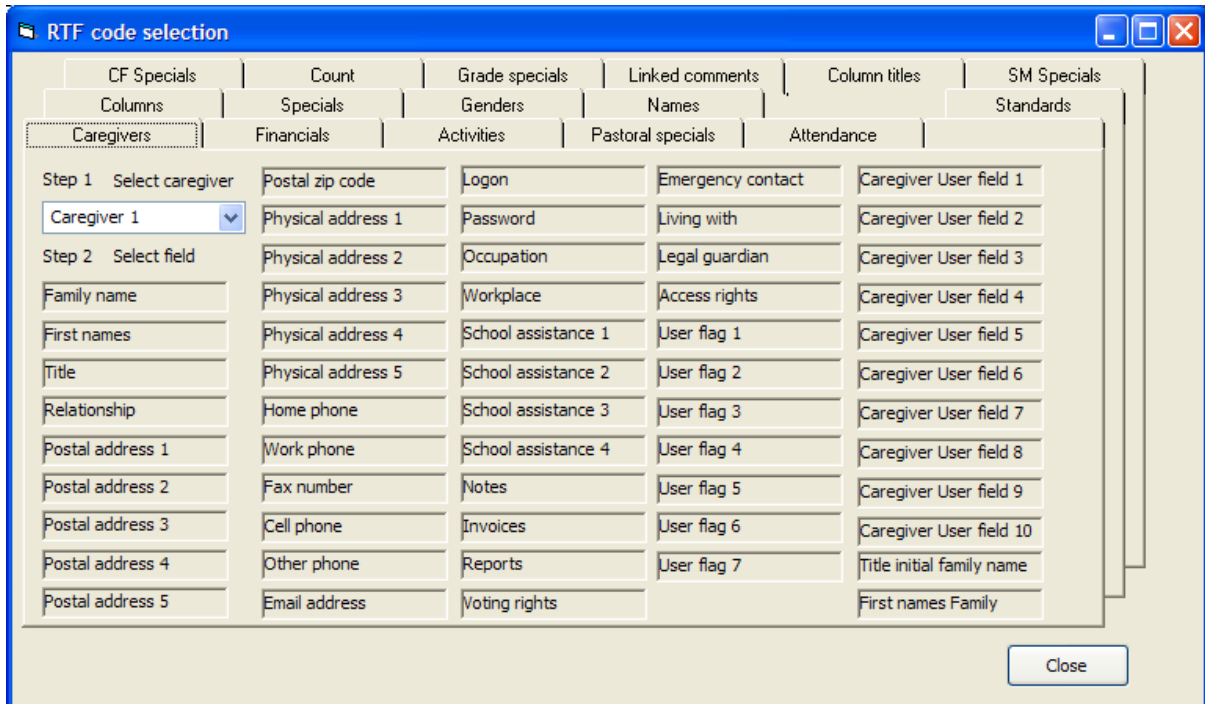
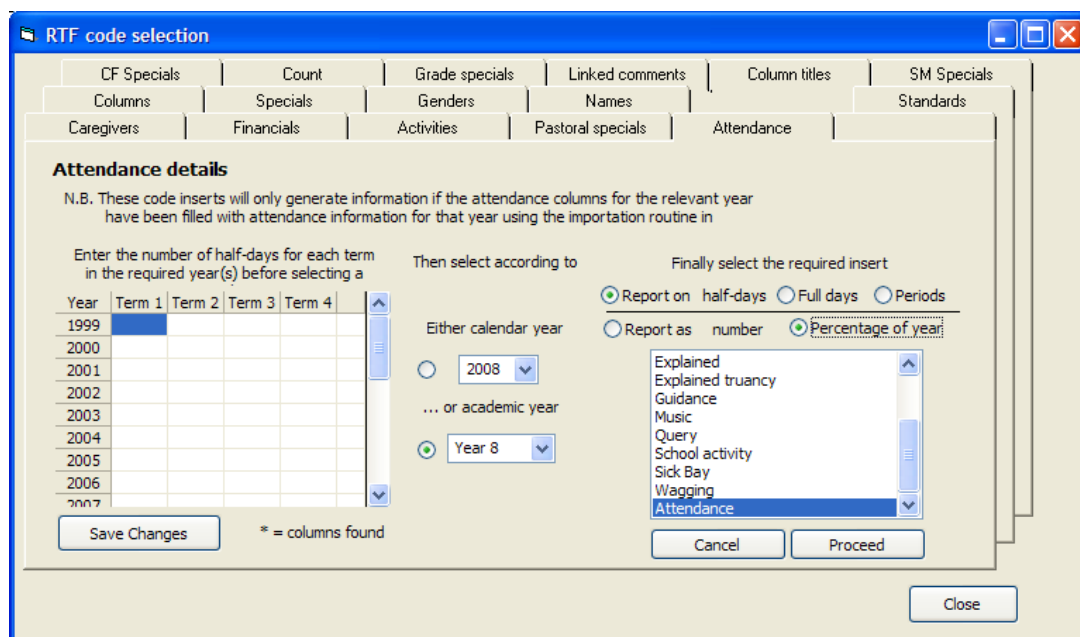


Illustration 22 : Caregiver code insertions

### Attendance details

This tab, shown below, allows you to report on either a number or percentage relating to absences/attendances.



Once the half days per term has been entered, an asterisk in the right column of the table indicates that the absences columns for that year have been installed into the database. As mentioned in the orange-backed message, you must have both installed the relevant columns AND

imported the relevant summary data via CMAAdministrator in order for this process to be able to return sensible information.

Assuming you have done this then you have the following choices.

- 1 Do you wish to retrieve data relating to a particular calendar year or to the current student's particular academic year? This is done by making the required selection from the two popup boxes in the middle of the screen.
- 2 Do you wish to report half-days, full-days or periods. If you select 'Periods' then you will not have any choice in the next selection.
- 3 Do you wish to report the number of absences (or attendances) or their percentage of the full year.
- 4 Finally, what is the absence reason which you wish to report on.

**Note:** At the bottom of the list you can report 'Attendance'. This will determine the total number of half-days or full-days absent, and subtract this from the total half-days (or full-days) determined from the left hand table.

Thus it is possible to report eg. on a student's percentage attendance over a number of years.

Similarly, by 'filling a (suitable) column with' the percentage attendance, or numbers of waggged-half days and a second column with relevant academic results (eg. total level 1 NCEA GPA) it is possible to generate a correlation regression analysis between the two.



## 29 Contact Details

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### MUSAC Nationwide

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