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

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.

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Conventions used

Example	Description
<enter></enter>	Means 'Press the Enter key'
Ctrl	Refers to the Control key, usually displayed as Ctrl on your keyboard
Alt+S	Press and hold the Alt key then press the 'S' key at the same time
Click Next	Click on the screen button labelled Next
Double-click	Press the left mouse button twice in rapid succession
Type this	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	Refers to MUSAC Classic product suite
SM, CM, AB6	Student Manager, ClassRoom Manager, Absences for Windows (AB6)
Start, Enter	Colour used to draw attention to text
	Indicates compliance with Ministry of Education requirements
MUSAC	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 (<u>http://www.musac.co.nz</u>). If not already registered on our website, visit the MUSAC website to register for downloads and support.

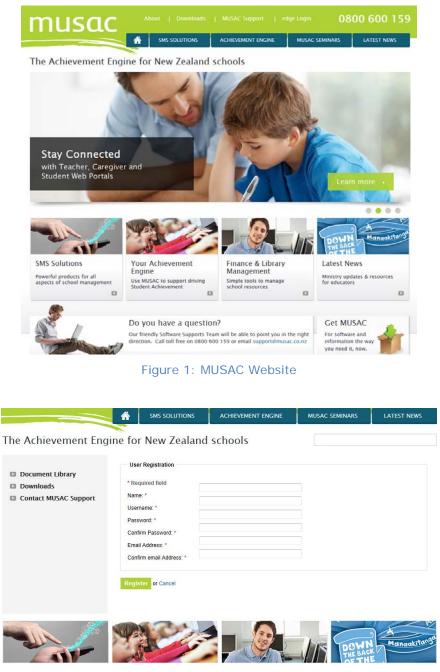


Figure 2: Registration Process

- 1 Complete all fields
- 2 Click Register

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

3 Installation Process

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.

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

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

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

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6 Introducing Student Manager

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.

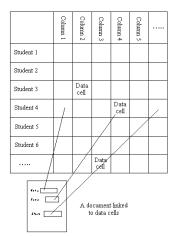


Figure 4: A document linked to data cells

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.

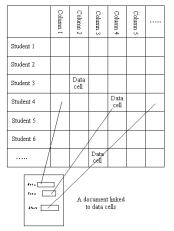


Figure 5: Several documents linked to data cells

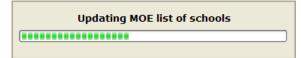
The school administrative staff usually enter the module viewing all students and probably apply a filter before proceeding.

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.

	School Data Year - 201	2	To search type a students s	umame	11.22		
			Student /	Year	Class	Room	Status
C		1000	BRANUS, Stephen	9	Yr9	FC3	Ful tim
Edit / Add Students	Printing	AAA MOE Returns	CORMIER, Rod	11	Yr11	FC3	Full tim
- Studenta			DACH, Damon	9	Yr9	FC2	Full tim
3	L		DACH, Ode	12	Yr12	FC4	Full tim
			DAVIS, Janick	10	Yr 10	FC1	Full tim
			EMARD, Adelard	10	Yr 10	FC4	Full tin
Change	(FAUASI, Lexie	8	Yr8	FC2	Full tim
Databases	Student Einances	Pastoral	LIASI, Samantha	8	Yr8	FC2	Full tim
			MARVIN, Robin	12	Yr12	FC2	Full tim
1	0		MILLS, Mose	13	Yr13	FC3	Full tim
1			MORIORO, Hubert	8	Yr8	FC2	Full tim
	1447		PAORI, Bert	10	Yr 10	FC3	Full tim
Configure Settings	Utities	Badup and	REILLY, Nannie	9	Yr9	FC1	Full tim
		Restore	ROLFSON, Abdullah	9	Yr9	FC1	Full tin
			ROLFSON, Emlee	10	Yr 10	FC3	Full tim
			ROSENBAUM, Gust	11	Yr11	FC4	Full tim
			RUECKER, Brian	10	Yr 10	FC1	Full tim
A			SANFORD, Hildur	13	Yr13	FC1	Full tim
Set Elter		Exit	TOPOLOA, Korey	9	Yr9	FC4	Full tim
Full time Part time Pre 19 0 otal students : 19 / 20	e-enrol Leaver Delete	Unknown Filter Total 0 19					
urrent database : d:\minis	etru echoollom lon andh						
urrent Filter: Full time and	Part time students						
o search type name and v	watch top of student list						
NROL reminders							
here are students that rea	quire updating in ENROL.						
New Enro	Iments Awaiting Attendance - 2						
	waiting Upload - 0						

Figure 6: The main menu

	n 11.9.38 17/11/2011 Administrator School	Ministry School D:\Ministry School\CM\cm.mdb - [P	ersonal details.dmt BRAK]	
8				- 8 ×
All Documents	Student : Stephen BRAKUS	Year : 9 Class : Yr9	Room : FC3	A
	Legal Sumame BRAKUS Preferred Sumame Legal Firstname Stephen Preferred Stephen	This year Next year Year 9 10 Class 2012 10 Room 2012 FC3		
Personal details dnt	Middle Name Other personal details Family Family details Residential Address 1 Address 1 Address 2 Address 3 OTY Address 5	Teacher / Dean House Local student ID Type International Exchange Status Full time Nat. Student T248124817	Gender Male Date of birth 11/11/1990 Age at Jan 1 12.01.21 Age at today 13.00.11 Enrolment 07/015	
	Address Info Withheld (McE Privacy Indicator) Mailing details Home phone 3565897 Student's phone 3547894 Student's email brakuss@hotmail.com Medical Ca	GerCheck NSN URL: <u>UEL natast</u> Ministry details regiver details Options ancial details Timetable	Enrolment details Maori details Pastoral	
Add Document				Y t
	Add Prev Next Print	View Alarms Filter < Page 1/1	Page >	Help Close
		igure 7: Student da	ta oditor	
KI SM Fir Help	nancials version 6.16.585			\cm.mdb
ľ	Transactions	Process Autopayments	Print any Temporary Lists	
	Invoicing	Reports	Global Processes	
	Print <u>S</u> tatements	Print Receipts	Print Credit Notes	
3	Consolidation	Billable Items	Send Batch to Accounts	
Ţ	▶ <u>D</u> esign Financial ■ Documents	Einancial Defaults		

Figure 8: Student Finances menu

musac

View / Enter Pupi's Pastoral Data	T Design of the second s		100 E		ow / hide columns		
	BARUS, Stephen 9	#15;	< Back	tjext >> D	ste 🖌 Show Al		
A Quick Entry Action Completed	Total Transactions : 0	Total Offence Points : 0	Total Merit Points : 0	Net Total Points : 0			
A Completed	No. Date Teach	er Type Detail1	Pts1 Detail2	Pts2 Detail3	Pts3 Action	Comment	
Print Pastoral Lists							
r L							
Pastoral Litities							
E R							
User Specific							
User Specific Defaults							
Pastoral							
Configuration							
Pastoral Qocument							
Design							
	C .		tby a column click on To very	w the complete details of a			
			t by a column click on To view re column header individu	ual transaction double click	п.		
	Year 2008	Print This Screen					
							10

Figure 9: Pastoral menu

Configure Settings

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

Help			
School Details	Language Alternatives	ENROL Configuration	Personal Notes Files
Group Maintenance	Pata Column Maintenance	Popup List Maintenance	Comment Bank Maintenance
<u>Vears and Classes</u>	Imetable Option Details	Subject Details	Markbook Connections
Staff and Their Dossiers	\$ Billable Items	Pastoral Details	Document Management
			O glose
	Elaura 10. Card		

Figure 10: Configuration menu

Utilities

Utilities are processes used to carry out database management functions.

þ				
Eackup or Restore	Convert Pf5 Leavers	Who is Accessing the Database?	Remove Deletes from the Database	Clear Renamable Categories
Change Final Year to	Transfer Students Between Databases	Import or Export Student Data	Internet Domain Allocation	Case Conversion
		Special Exports /	Manage Students'	View Basic Student
Eamily Utilities	Elections	Imports	Photos	Data
View the Log File	View the Register	View <u>Pdf-saved</u> Letters	Email Students' Documents	End-of-year Data Roll-over
Prepare a Library Update Disk	Jmport NSN Updates	View get / Check NSN Log	@ Get / Check NSN	
	Figu	re 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 <u>www.musac.co.nz</u> 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.

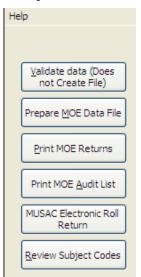


Figure 13: MOE Returns menu

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.

1 , (Change database	e (Curren	itly	using F:\CM\cm.mdb)
s	elect the datab	ase which	yo	u wish to use
	Database	Students		^
	cm.mdb	968		
	cmlv2002.mdb	331		
	cmlv2003.mdb	397		
	cmlv2004.mdb	0		
	cmlv2005.mdb	756		
	cmlv2006.mdb	1		
	cmlv2007b.mdb	7		
	cmlvpre2.mdb	755		
	CMIvPreenrol.mdb	0		
	cmpre.mdb	0		
				<u>×</u>
	Create a Nev	v Database *		
	* This creates a : including CM, Subjects, Cale Absences.	SM, Staff, Uni		

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.

Database	Students	<u>^</u>	
cm.mdb	968		
cmlv2002.mdb	331		
cmlv2003.mdb	397		
cmlv2004.mdb	0		
cmlv2005.mdb	756		
cmlv2006.mdb	1		
cmlv2007b.mdb	7		
cmlvpre2.mdb	755		
CMlvPreenrol.mdb	0		
cmpre.mdb	0		
		~	
Create a Ne	w Database *		
Create a Ne	w Database '		

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

		Schoo	Data Y	ear - 201	2	
	/ Add udents		Printing)E Returns
Dat	ange abases	\$	Student	jnances	& P	astoral
Con	figure Settin	gs 😫	Utilities		a Ba	ckup and Restore
	t Eilter				×	Egit
					Unknown	Filter Tota
	Part time	Pre-enrol	Leaver	Delete	Onwight	
Full time 19	0	0	Leaver 0	0	0	19
Full time 19 Total studi Current da Current Fil	0 ents : 19 / atabase : d: Iter: Full time	0 20 (ministry sch e and Part ti	0 ool\cm\cm.i me students	0 ndb		19
Full time 19 Total studi Current da Current Fil	0 ents : 19 / atabase : d: lter: Full time type name a	0 20 (ministry sch e and Part ti	0 ool\cm\cm.i me students	0 ndb		19
Full time 19 Total studi Current da Current Fil To search ENROL rei	0 ents : 19 / atabase : d: lter: Full time type name a minders	0 20 Iministry sch e and Part ti and watch to	0 ool\cm\cm.i me student: op of studer	0 ndb s nt list		19
Full time 19 Total studi Current da Current Fi Current Fi To search ENROL rei	0 ents : 19 / atabase : d: lter: Full time type name a minders students the	0 20 Iministry sch e and Part ti and watch to	0 ool\cm\cm.i me students op of studer odating in Ef	0 ndb s nt list IROL.	0	19

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.

File View Help	
Exit	1
Temporary data 🔹 🕨	View file names
Set path to Absences	Rebuild temporary data files
Refresh Theme	
	1
Refresh Theme	

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.

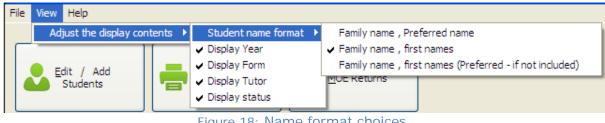


Figure 18: Name format choices

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.

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	Yr 10	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	Yr 10	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.

ither select students	s				
Activities Mark Books		Options	NZQA Stand	laula Ì	Schools
Years Classes Roo	ms Ge	nder, Place & Ethnicity	Columns		Type
Years Selec	ted Classes		Selected Booms	Status	
Year 8 Yi10 Year 9 Yi11 Year 10 Yi12 Year 11 Yi13 Year 13 Yi13			FC1 FC2 FC3 FC4	Full time Leaver Pre-enrolment Delete Reset the filter to just Full and Part time	
				students]
F All students		de	u may give a nam signed above and rsonal list of filter	e to a selection add it to your s. e students	Apply Filter
F All students		de	signed above and rsonal list of filter Full time and Part time Save Changes or Delete this Filte	e to a selection add it to your s. e students r Add to Your List er from Your List	Apply Filter
F All students	e students	de pe Filter name	signed above and rsonal list of filter Full time and Part time Save Changes or Delete this Filte Create a T	e to a selection add it to your s. e students r Add to Your List r from Your List agist Filter	Exclude 'public'
F All students	e students m indicates your D o change.	de pe Filter name	signed above and rsonal list of filter Full time and Part time Save Changes or Delete this Filte Create a T Edit a Ta	e to a selection add it to your s. e students r Add to Your List er from Your List	Exclude 'public'
F All students F Full time and Part tim A Chevron in the left colum FILTER. Click left column	nn indicates your [o change. :11 TER TOOL on th y shared taglist. L	eFAULT is page to	signed above and rsonal list of filter Full time and Part time Save Changes or Delete this Filte Create a T Edit a Ta Carry out a Fa	e to a selection add it to your s. e students r Add to Your List r from Your List agist Filter gist Filter	Exclude 'public'

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'



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'.

Either select	students	1 ⁰			
	rk Books	Options	NZQA Sta		Schools
and the second s	Classes Rooms	Gender, Place & Ethnicity	Colum		Туре
Years	Selected Class	ses	Selected Rooms	Status	_
Year 8 Year 9	Yr10 Yr11	()	FC1 FC2	Full time Part time	
Year 10 Year 11	Y/12 Y/13 Y/8		FC3 FC4	Leaver Pre-enrolment Delete	
Year 13	Yr9				
				Reset the filter to just Full and Part time	st
or select a	previously des	signed filter vo		students	
F All studen	previously des	de pe		me to a selection d add it to your ers.	Apply Filter
F All studen	its	de pe	signed above an rsonal list of filte Full time and Part to	me to a selection d add it to your ers.	Apply Filter
F All studen	its	de pe	signed above an rsonal list of filto Full time and Part ti Save Changes	me to a selection d add it to your ers. me students	Exclude 'public'
F All studen	its	de pe	signed above an rsonal list of filto Full time and Part to Save Changes Delete this Fi	me to a selection d add it to your ers. me students or Add to Your List	
F All studen >F Coll three	its and Part and Builder ne left column indicat	tes your DEFAULT	signed above an rsonal list of filto Full time and Part ti Save Changes Delete this Fil Create a	me to a selection d add it to your ers. me students or Add to Your List Iter from Your List	Exclude 'public'
F All studen >F Culture A Chevron in th FilTER. Oldk le	its and Part Bine Blucker	es your DEFAULT	signed above an rsonal list of filt Full time and Part to Save Changes Delete this Fil Create a Edit a	me to a selection d add it to your ers. me students or Add to Your List iter from Your List Taglist Filter	Exclude 'public'
F All studen >F Colone A Chevron in th FilTER. Click le F is a standard change.	its ind Fort fine intuker the column indicat fit column to change fitter, use FILTER TO Fits a publicly shared	es your DEFAULT COL on this page to	signed above an rsonal list of filt Full time and Part to Save Changes Delete this Fil Create a Edit a 1 Carry out a	me to a selection d add it to your ers. me students or Add to Your List ther from Your List Taglist Filter Taglist Filter	Exclude 'public'

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.

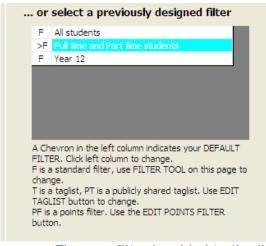


Figure 23: The new filter is added to the list

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

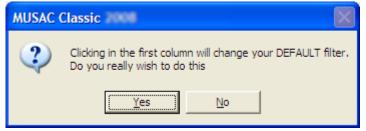


Figure 24: Favourite filter confirmation

'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'.

	dut filtur				5
		Bullet /	New Date	1	halls - Th
Tag-list fil	Rors	BAGA Sector	100 1000	1000	Pulling
1225		CORVER, Rac		- 23	Put time :
NU HAY CER	ne a Rier unun cantante qu'es Miny selected pluverss.	Lack, Danan		100	Fulling
which there a	skuberity urban sous wah to indude Rain the Blain		100		
laut, give y	year Rine a-mena, and aare di.	Deville, Januar	40	PCL	74.078
		Brakb, America	40		Pultime
		Pauliti-Leve		+12	Pul time
er nene 1	In party ban				
	Der Grent Besten	CHI, Tephan	11		Pulline.
		UNE, Seventre		PCI	Pull line
	Plate the top let oxide:	Profit Proc. Promet			
	Trate the legislitanes	M213. Moor	-20	103	Public
		H0R20R0, Huber1	8.1	RCL	7.4 tive
	El trade as only 1 any diverge 7	NACRI, Bert	20	PC2	74.518
	There as that everywhere part through it	425./1, Harring		101	Pul 104
		ROUTSON, Appular		/fC1	Alles
1974	Jaki - Oricy I (ani (mange I)	BOJ/SON, Ervice	11	PC2	Pultone
		ROGERSHIM, Duri	20	PC6	Fulling
	first literature and the second se	8.8085, her	30		Pul tem
	Concernant of the second	SWYOR, HEA		901	Put time
		The state on solution where the solution of th		IOA 1	di Con e restati nă bati

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	Yr 10	FC3	Full time
ROLFSON, Emilee	10	Yr 10	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 se	arch filters		Search results		
This proce text recor	ess allows you to identify students whose ds contain a certain word or phrase.	Student	Column	Text	
Enter th	e text sought				
P	0				
[Text Search				
[Phone / Fax Search				
	Set Filter to Displayed Students				L
	Print the Selected Entries				L
	Selecting none will result in all entries being filtered or printed.				
					~

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' \dots

ast search filters		Search results		
This process allows you to identify students whose	Student	Column	Text	~
text records contain a certain word or phrase.	CORMIER, Rodger	First Names	Rodger	
	CORMIER, Rodger	Report name	Rodger	
Enter the text sought	CORMIER, Rodger	Report full name	Rodger CORMIER	
RQ	CORMIER, Rodger	Preferred	Rod	
RU	DACH, Damon	CG: DACH, Dorothy - First names	Dorothy	
£	MARVIN, Robin	First Names	Robin	
Text Search	MARVIN, Robin	Report name	Robin	
	MARVIN, Robin	Report full name	Robin MARVIN	
Phone / Fax Search	MARVIN, Robin	Preferred	Robin	
	MORIORO, Hubert	Family Name	MORIORO	
	MORIORO, Hubert	Report full name	Hubert MORIORO	
Set Filter to Displayed	MORIORO, Hubert	Mail to whom	MORIORO	
Students	MORIORO, Hubert	CG: MORIORO, Marge - Family name	MORIORO	
	MORIORO, Hubert	CG: MORIORO, Kerry - Family name	MORIORO	
	REILLY, Nannie	CG: REILLY, Rodney - First names	Rodney	
Print the Selected Entries	ROLFSON, Abdullah	Family Name	ROLFSON	
Print the Selected Entries	ROLFSON, Abdullah	Report full name	Abdullah ROLFSON	
	ROLFSON, Abdullah	Mail to whom	ROLFSON	
Selecting none will result in all	ROLFSON, Abdullah	CG: ROLFSON, Rolf - Family name	ROLFSON	
entries being filtered or printed.	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	~
	DOLECON E-	Mail an oldered	DOLECON	<u> </u>

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 ROBINSON, BRENDON M	Report name Report full name	BRENDON BRENDON ROBINSON
ROBINSON, BRENDON M	Report full name	BRENDON ROBINSON
ROBINSON, BRENDON M SUTTON, BRENT GARY	Report full name First Names	BRENDON ROBINSON BRENT GARY
ROBINSON, BRENDON M SUTTON, BRENT GARY SUTTON, BRENT GARY	Report full name First Names Preferred	BRENDON ROBINSON BRENT GARY BRENT
ROBINSON, BRENDON M SUTTON, BRENT GARY SUTTON, BRENT GARY SUTTON, BRENT GARY	Report full name First Names Preferred Report name	BRENDON ROBINSON BRENT GARY BRENT BRENT
ROBINSON, BRENDON M SUTTON, BRENT GARY SUTTON, BRENT GARY SUTTON, BRENT GARY	Report full name First Names Preferred Report name	BRENDON ROBINSON BRENT GARY BRENT BRENT

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
	ents : 6 / 20			mdb		
		Ministry Sch	iool\CM\cm.	mdb		

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

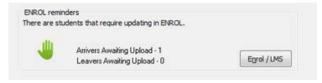


Figure 33: ENROL Utility

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 (<u>www.musac.co.nz</u>). 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').
- inform the Administrator of the success or failure of the upload and clearly indicate what 4 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.

Change database (Currently using D:\CM\cm.mdb)						
Select the data	base which	you wish to use				
Database	Students					
cm.mdb	22					
cmlv2002.mdb	331					
cmlv2003.mdb	397					
cmlv2004.mdb	0					
cmlv2005.mdb	756					
cmlv2006.mdb	1					
cmlv2007b.mdb	7					
cmlvpre2.mdb	755					
CMIvPreenrol.mdb	0					
cmpre.mdb	0					
* This creates a	w Database * set of database SM, Staff, Unit					
Subjects, Cal Absences.		-,				
Elguro 24	Soloctio	n of the database				

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.

itabase	Students	_	New database title	
i.mdb ilv2002.mdb	22 331		ClassRoom Manager	✓ Start with empty database, but
lv2002.mdb	397			Copy the column structure,
nlv2003.mdb	0			comments and popup definitions
mlv2005.mdb	756			from the main database
mlv2006.mdb	1		Student Manager	Start with empty database
mlv2007b.mdb	7		Ab	
mlvpre2.mdb	755		Absences	Start with empty database
CMIvPreenrol.mdb	0			
mpre.mdb	0		You may NOT copy t	he main databases : CM, SM and Absences
			Staff	Start with empty database
			Calendar	Start with empty database
			Units	Start with empty database
			Subjects	Start with empty database
			If you do NOT 'Start made of the existing	with an empty database' then a copy will be main version
Create a Ne	w Database *		Proceed to	Create

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

📙 Student Manager versio	n 11.9.38 17/11/2011 Administrator School Ministr	y School D:\Ministry School\CM\cm.mdb - [Personal o	details.dmt BRAK]	
0				_ 8 ×
8				
- All Documents	Student : Stephen BRAKUS	Year : 9 Class : Yr9 Room	: FC3	
	Legal Surname BRAKUS	This year Next year		
	Preferred Surname	Year 9 10		
	Legal Firstname Stephen	Class 2012 Yr9		
	Preferred Stephen Stephen	Room 2012 FC3		
Personal details.dmt	Middle Name	Teacher / Dean		
	Other personal details	House		
	Family	Register details	Gender Male	
	Family details Residential Address (No P.O. Box or Private Bag)	Local 30800015	Date of birth 11/11/1998	
	Address 1 Address 1 Address 2	Type International Exchange	Age at Jan 1 12.01.21	
	Address 2 Address 2 Address 3 CITY	Status Full time	Age at today 13.00.12	
	Address 4	Nat. Student Number	Enrolment 07/015 number	
	Address 5	Get/Check NSN		
	Address Info Withheld (MoE Privacy Indicator) Mailing details	URL: URL not set	Enrolment details	
	Home phone 3565897	Ministry details	Maori details	
	Student's phone 3547894			
	Student's email brakuss@hotmail.com			
	Medical Caregiver	details Options	Pastoral	
	Sensitive Financial		Fastoral	
				V
Add Document				<u>+</u>
				▶ //:
	Add Prev Next Print View	Alarms Filter < Page 1/1 Page	>	Help Close

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

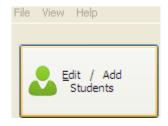
Figure 36: The 'Personal details' document

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.

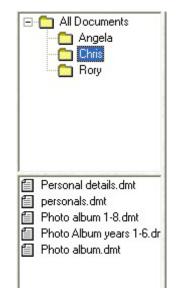


Figure 37: The document selection area

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.

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.

Add Document] 	- -
	Add Prev Next Pret Verw Alarma Filtar < Page 1/1 Page >	Help Close

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 Roo	m : FC3
Legal Surname BRAKUS Preferred Surname Legal Firstname Preferred Firstname Middle Name Other personal details	This year Next year Year 9 10 Class 2012 Yr9 Room 2012 FC3 Teacher	8
Family Family details Residential Address (No P.O. Box or Private Bag) Address 1 Address 2 Address 3 CITY Address 4 Address 5 Address 6 Mailing details Home phone 3565897 Student's phone 3547894 Student's email brakuss@hotmail.com	Register details Local 30800015 student ID International Exchange Type International Exchange Status Full time Nat. Student 1248124817 Number GetCheck NSN URL: URL not set Ministry details	GenderMaleDate of birth11/11/1998Age at Jan 112.01.21Age at today13.00.12Enrolment number07/015Enrolment detailsMaori details
	ver details Options	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. Form 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'.

rl I REILLY, Nannie (Year : 9 Class : Yr9 Room : FC1) 2 ROLFSON, Abdullah (Year : 9 Class : Yr9 Room : FC1) 3 ROLFSON, Emilee (Year : 10 Class : Yr10 Room : FC3) 4 ROSENBAUM, Gust (Year : 11 Class : Yr11 Room : FC4) 5 RUECKER, Brian (Year : 10 Class : Yr10 Room : FC1)	 Search by family name Search by any part of name Search by enrolment number Search by student ID Search by caregiver and then student Search by NSN
	Cancel

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.

498 of 507			
Add Prev	Next Print View Alarms Filter	< Page 1 / 1	Page >
	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.

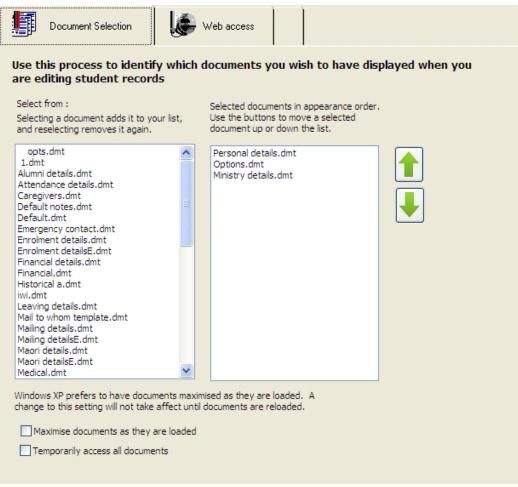


Figure 42: The document selection screen

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

J	Manager options	Web access
MUS	GAC Website.	
	6	D musac Software for Schools Solutions for People
		e you may download the latest updates from our web site you install these while any MUSAC applications are running.
	ect access to Te Ke	ete Ipurangi zi - The Online Learning Centre

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....

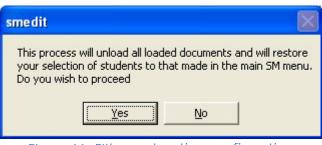


Figure 44: Filter restoration confirmation

Help

This provides access to the help screens.

Page up and down

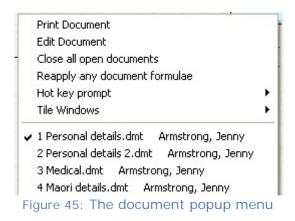
The next two buttons allow you to page up and down through the various pages of a multi-page document. We have not provided any such documents in Student Manager. If you have created any of your own then these buttons will come into play.

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.



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.



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.

	Family Name	First Names	Freferred	A05'888	Appress 2	A00'882-3	Altress 4	Addiese 1	Home phone	Student's prone	Studen(a antal	Yas!	Ciass
Configure Filte	0												
RANUE, Emphan	ERAKUS	Bapten.	Stephen .	Address 1	Address 2	C/TV	-					9	-
CAVIER, Nos	CORVIER	Rodger	Roc	Address 1	Address 2	CITY						5	
ACH, Damon	DACH	Damon	Dance	Address 1	Address 2	CITY						9	
ACH, Ode	DACH.	Öde	Ode	Address 1	Address 2	CITY						5	
AUS Janok	CAVIS	Janick.	Janick	Andreas 1	Accreas 2	CITY						15	
BIGARD, Adalant	EMARD	Adatand	Adatant	Address 1	Address 2	City						12	
ALIASI, Levie	PAUASI	Levie	Lece:	Address 1	Address 2	CITY						1	
ONES, Janna	JONES	Janna	Janina									15	
CHES. Jone .	JONE1	Jonathon	Jone									10	
OHN. Staphon	KIRN	Stephin	Stagnich	Address 1	ADDress 2	CITY						12	
ASI Samantha	LIASI	Samantha	Samanma	Address 1	Address 2	CITY						1	-
HAVN, Robin	MARVIN	Noon	Robe	Address 1	Address 2	CITY						5	
HLLS, Hose	VILLS	Mose	Hose	Address 1	Address 2	CITY						10	
ORIGRO, Hubert	NORIORO	Hubert	Hubert	Address 1	Address 2	CITY						1	
ADR: Bert	FACR:	Bert	Bert	Adeleas 1	ADDINES 2	CITY						15	
ELLY, Nanhia	RELLY	Nannia	Nannia	Address 1	Address 2	CITY						9	
CLPSON Absulat	# OLFSON	Abdulian	Abdullah	Address !	Address 2	CITY						5	
OLFEON Emiles	ROLFSON	Emilas	Entipe	Address 1	Address 2	OITY-						11	
COSTNBAUM, Gust	ROSENBAUM	Gust.	Gust	Address 1	Address 2	CITY						10	
UECKER, Bran	RUECKER	Brian	Brian	Address 1	Address 2	CITY						10	
IANFORD, HIGH	SANFORD	Hidur	Ridur	Accreas 1	Address 2	CITY	1					9	
		1000	1224	1000000	10000000	100							



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 popup.

Regula	r student	External student	~
Regular	student	International Exchange student	
Regular	student	International fee-paying student	
Regular	student	Not attending	
Regular		NZAID sponsored student (formerly MFAT) Regular Adult student	
Regular		Regular student	
Regular	student	Return. adult att. teen p. unit	~
Desular	at a la set	The I have	

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 \leftarrow and \rightarrow 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.

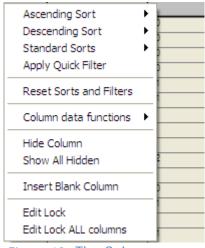
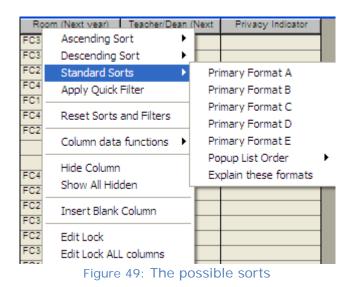


Figure 48: The Column menu

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.





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

🖣 Quick filter 🛛 🔀	🖣 Quick filter 🛛 🔀	🖻 Quick filter 🛛 🔀
Room (Next year) Search for entries which are before are after contain are blank are not blank are between Remember that text comparisons are case-sensitive	Date of birth Search for dates which are before are after are blank are not blank are between	Year Search for numbers which are : > 0 and < < < > > < < > > < > < > blank not blank between coutside
Apply just to students currently Apply to all students in the dossier Proceed Cancel	 Apply just to students currently Apply to all students in the dossier Proceed Cancel 	Apply just to students currently Apply to all students in the dossier Proceed Cancel

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.

Fill this column with	
Column Type : Popup entry Select the popup entry	
FC1 FC2 FC3	
FC4	
Proceed	Cancel
51: Fill a column with	

If its a numeric column then you have three choices:

🖣 Fill this column with 🛛 🔀
Column Type : Numeric
Your own number
O A 'calculated' result
O The contents of another column
Proceed Cancel

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.



RTF code selection	
Columns Specials Genders Caregivers Financials Activities	Names Standards Pastoral specials Attendance nked comments Column titles SM Specials Medical details Family details Doctor name Family title Doctor - contact details Family salutation Doctor - notes Timetable details Dental - details Timetable details Timetable option set name Timetable option set name
Proceed	Has medical data

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.

🖣 Fill this column with 🔀
Column Type : Numeric
O Your own number
 A 'calculated' result
• The contents of another column
1 2 3 4 5 Columns
Student Manager
PAT
TOSCA
Curriculum Framework
Staff Columns
OEM Assessment
Record of Achievement
School Reporting
Careers
Absence Summary Details NZQA Standards
NZQA Standards Numeracy
Manorady V
• Record zero results as Zero CLeave blank
Proceed Cancel
Proceed Cancel

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.

	Fill this column w	ith	×
	Column Type : Text	t	
	 Age as at 22 	2/11/2008	
	O Your own text	Add text to	
	 The contents of the 		
	 A column selected fr 	om a document	
	 A 'calculated' result 		
	O The contents of ano	ther column	
	P	roceed Cancel	٦
igur	e 55: Fill a c	column with	

'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.

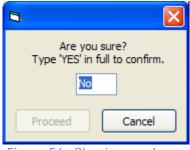


Figure 56: Clearing a column

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.

Step 1/2 : Source column
Select the column which holds the entries which you wish to convert.
1 2 3 4 5 Columns Student Manager Image: Im

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.

ease set up the conversion	table on which to b	ase the resi	ults.
Enter the details of your res	ults conversion proc	cess	
Convert from	Convert to	~	Convert from' may include :
1 to 10	Pre-teen 5, Teens Older		single results e.g. 23.45
11,12,13,14,15,16,17,18,			several results e.g. Red,Blue,Green
19 to 100			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.

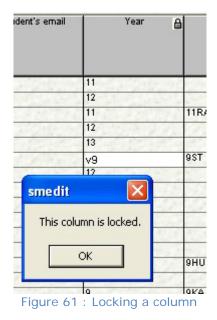
The third 'Column data function' is the display of column statistics. If you select this then an overlay will appear at the bottom of the screen providing the number of entries, and the mean and standard deviation of the results in the columns. Click the 'OK' button when you have seen enough. Of course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

Bishop,	Adam	1.5 11 1	11	23 25 11 12	N 25 10 223
	Number	1062 2084	287	71	12
ОК	Mean	and from the	10.76	from the and from the	a post of the los
199.00	Std.Dev.	Section 12	1.32	Mar Standard	A state of the second

	Figure	60:	Co	lumn	stat	istics	S
--	--------	-----	----	------	------	--------	---

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.



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.

Options					hools	Activities	
Years Forms (aroups	Gender, Pla	ce & Ethnicity	Lo	lumns	Type	Mark Books
Years	Selecte	d Forms			Selected Groups	Status	
Year 0 Year 1 Year 2 Year 3 Year 3 Year 4 Year 5 Year 6 Year 7 Year 8 Year 8	10AK 10AS 10ED 10F0 10US 10MK 11DN 11DV 11HP	11PT 11BA 12CJ 12MA 12MC 12OA 12TH 12WS 13AD	9KA 9ML 9NU 9PE 9ST		long VF1 VF2 VF3 VF4	Full time Patt time Leaver Pre-enrolment Delete	
Year 9 🕑	11M0 11PA 11PK	13SK 9HG 9HU				Reset the filter to just Full and Part time 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.

musac

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avout <	Basic layout Column	Visible	Width	~	Hide all
Basic Layout	Family Name	Yes	100		Columns
	First Names	Yes	100		
	Preferred	Yes	100		Show all
	Address 1	Yes	100		Columns
	Address 2	Yes	100		Adjust Col.
	Address 3	Yes	100		Widths
	Address 4	Yes	100		
	Address 5	Yes	100		Select All
	Home phone	Yes	100		Select All
	Student's phone	Yes	100		
	Student's email	Yes	100		
	Year	Yes	100		
	Class	Yes	100		
	Room	Yes	100		
Add Layout Delete Layout	Teacher/Dean Display Curriculum Framework objective details	Yes	100	~	

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.

5	Configure
	Arrange Columns Column Headings Row Headings Filter Sor
	Choose a layout for the Student Headings on the left hand side of the grid. Surname, Preferred Name Surname, Full Name Surname, Preferred Name, DOB Surname, Preferred Name, Year, Class, Room
	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.

Configure		
Arrange Columns Column	Headings Row Headings Filter) Sor
Column	Sort	^
Family Name	Ascending	
First Names		
Preferred	Descending 🗾	
Address 1	None	=
Address 2	Ascending	
Address 3	Descending	
Address 4		
Address 5		
Home phone		
Student's phone		
Student's email		
Year		
Class		
Room		~

Figure 66: Sorting the columns

Column utilities

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

Address 1 Address 2 Address 3 Address 5 Home phone Student's phone Dean Teacher/Dean House Next Year Form(Next year) Group(Next year) Teacher/Dean (Next year) Type National Student Index	 Remove data from column(s) You may not remove data from the basic ten national columns. These have not been listed. Exchange two column formulae This process allows the movement of formulae between columns. Before applying formulae moved by this routine please step through making sure that the altered connections are correct.

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....

Ę	Configure	
E	Configure Please select those columns which you wish to e Hold down the Ctrl key to multi-select columns. Family Name First Names Preferred Address 1 Address 2 Address 2 Address 3 Address 4 Address 5 Home phone Student's phone Dean This Year Form Group	xport.
	Teacher/Dean House Next Year Form(Next year) Group(Next year) Teacher/Dean (Next year)	 ■
	Select all If you select none then all columns will be exported.	

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.

musac

Student Manager MUSAC Classic 2014

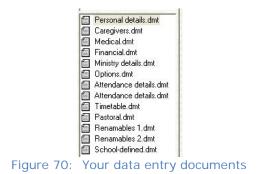
	- · · ·	· 🕂 🖨 🛕) =			tempJGR.csv -	Microsoft Exc	el				6	
9	Home In	sert Page Layout	Formulas Data	Review View	Developer						7.9	0 - 0
an l	🔏 Calibri	- 11 - A	× = = = =	Wrap Text	General		-	THE FEE		ΣΑ	utoSum • A	A
aste	Q.						Conditional	Format Cell	Insert Del	ete Format	II - ZJ Sort & F	
*	1	<u>u</u> - 🖽 - 🖄 - 🗛	- I have a second to	第 課 团 Merge & Cent		, 80, 80,		as Table * Styles		- 2C	lear * Filter * S	
pboa	rd 🦻	Font	G	Alignment	Ta Numb	er D		Styles	Ce	Rs)	Editing	
G	i55 🔹 🤇	fx										
	В	С	D	E	F	G	н	1	L	M	N	0
Leg	gal_Surname	Preferred_Surname	Legal_Firstname	Preferred_Firstname	Middle_Names	PAddress1	PAddress2	PAddress3 H	lome_phone	Student_s_phone	Student_email	This_Ye
BRA	AKUS	BRAKUS	Stephen	Stephen	Peter	Address 1	Address 2	CITY	12345678	87654321	brakus@hotma	0
co	RMIER	CORMIER	Rodger	Rod		Address 1	Address 2	CITY	12345678	87654321	cormier@hotm	ŧ
DA	CH	DACH	Damon	Damon		Address 1	Address 2	CITY	12345678	87654321	dach@hotmail.	
DA	CH	DACH	Odie	Odie	John	Address 1	Address 2	CITY	12345678	87654321	dach@hotmail.	(
DA	VIS	DAVIS	Janick	Janick		Address 1	Address 2	CITY	12345678	87654321	davis@hotmail.	
EM.	IARD	EMARD	Adelard	Adelard		Address 1	Address 2	CITY	12345678	87654321		
FAL	UASI	FAUASI	Lexie	Lexie		Address 1	Address 2	CITY	12345678	87654321	Fauasi@hotmai	
LIA	SI	LIASI	Samantha	Samantha	Jane	Address 1	Address 2	CITY	12345678	87654321		
MA	RVIN	MARVIN	Robin	Robin		Address 1	Address 2	CITY	12345678	87654321	marvin@hotma	
MIL	LLS	MILLS	Mose	Mose		Address 1	Address 2	CITY	12345678	87654321	Mills@hotmail.	
MO	ORIORO	MORIORO	Hubert	Hubert		Address 1	Address 2	CITY	12345678	87654321	Morioro@hotm	
PA	ORI	PAORI	Bert	Bert	Richard	Aderess 1	Address 2	CITY	12345678	87654321	paori@hotmail.	
REI	ILLY	REILLY	Nannie	Nannie		Address 1	Address 2	CITY	12345678	87654321		
RO	LFSON	ROLFSON	Abdullah	Abdullah		Address 1	Address 2	CITY	12345678	87654321	321rolfson@ho	1
RO	LFSON	ROLFSON	Emilee	Emilee		Address 1	Address 2	CITY	12345678	87654321	rolfson12@hotr	
RO	SENBAUM	ROSENBAUM	Gust	Gust	Vollere	Address 1	Address 2	CITY	12345678	87654321		
RU	ECKER	RUECKER	Brian	Brian		Address 1	Address 2	CITY	12345678	87654321	ruecker@hotma	
SAN	NFORD	SANFORD	Hildur	Hildur			Address 2		12345678	87654321		
TO	POLOA	TOPOLOA	Korey	Korey		Address 1	Address 2	CITY	12345678	87654321	topoloa@hotm	
		1.420-1120										
	H tempJGR	1927					1.4		10.0			

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.



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 BRAKUS	This year Next year						
First Names Stephen	Year 9 10						
Preferred Stephen	Class						
Other personal details	Room 2008 FC3 2009 FC3						
Family	Teacher						
Family details	House						
Address 1 Address 1	Register details	Gender Male					
Address 2 Address 2							
Address 3 CITY	Local 30800015	Date of birth 11/11/1993					
Address 4	Type Regular student	Age at Jan 1 14.01.21					
Address 5	Status Full time	Age at today 14.11.29					
Address Info Withheld (MoE Privacy Indicator)	Nat. Student	Enrolment 07/015					
Mailing details	Number	number					
	Get/Check NSN						
Home phone	URL: <u>URL not set</u>	Enrolment details					
Student's phone							
Student's email	Ministry details	Maori details					
Medical Caregiv	or details Options	Pastoral					
Sensitive Financ	I details 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.

Туре	Regular student	
Status Nat. Student Number	Full t Delete Full time Leaver Part time Pre-enrolment	
Figu	re 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.

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 <u>N</u> SN
Status on leaving	Full time 💌	Date started here: 22/0	5/2007
Highest NQF attainment	*		•
Highest Non-NQF attainment *			•
UE *			
Leaving reason *			If the Leaving Reason is set to 'transferred to another school in New Zealand' then the
School of destination *	1 2 3 4 5 6		student (and any attached standards) will automatically be withdrawn from NZQA
Intended region *			×
Post school activity *			-
* Categories specified b	y the Ministry of Education		
Teaching and learning			A tick will Indicate that Teaching and Learning
Academic Attendance	Behavioural	Health	Notes are available to be handed over.
Reason for status chang	ge		The update to Enrol can be performed later, using the ENROL Leaver Utility.
Update ENROL for leav	ver -		
Update later	O Update now		

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 I	MARVIN	١	Year:9	Class :	Room : FC2			
First name Middle names Initials Preferred Surname Report name		Languages spoken (other than English)						
Report full name Travel mode Changes of school	Robin MARVIN	Language spoken home Buddy/Mentor (Th Buddy/Mentor (Ne year) Place of birth	is year) [

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 title	4artin Year:11 Form: Tutor:P/	Select the 'prin whose address	Position in family				
Salutation Prime caregiver Comment	μ	Р. аТ			Eldest Yes Youngest Yes Number of sbings (excludes ine' 0 Place in family 1		
Family members	A'CANNAR, Martin (youngest) (eldest)	Puture sblings Name	D.O.8.	Errol Date	Arrival Date	Recalculat	
	Save Changes	5					
	Select an Existing Family for this Student]					
	Create a New Family for this Student	Ĩ.					

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.

			helle	~
Select a family for A'CANNAR, Martin	Year: 11		1	
Form : Tutor : PATK		1	an	
		1	inne	
		,	ark J	
			nette	
		1	ie coe	
		1	1	
		1	ce J	
		1		
		,	lenni	_
		l.	(athleen E M	
		+	en	
		1	ellie	
		1	cola	
		1	/n	
		,	alee	
		,	helle	
		,	ae	
			oria	
			Rowena M	
		1	William	
		1	2	
		1		
		1	hris	
		1	te	
		E	м	
		E	jina	
		E		
		E	Angela	~
		DADCI AV D	iana	
			i	
			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.

	hysical Address Preferred *		Student's Pos	atal Address	Preferred *
Mail to whom	Brendan Irvine A'CANNAR				
Address 1	16 Bruadhead Avenue		Postal address 1	166 Morgan Street	
Address 2	NEW PLYMOUTH		Postal address 2	NEW PLYMOUTH	
Address 3			Postal address 3		
Address 4			Postal address 4		
Address 5			Postal address 5		
Postal code			Postal code		
	Copy >	1		< Co	ру
Mail to greeting			Geocode		
also has two addres indicate which of the	above addresses, each caregiver ses and in all cases you can a two is 'Preferred'. Which one will lesign a document addressed to a			'Mail to whom' (abo Mail to whom' (abov	·
button for a full desc	s. Click on the 'More information' cription of the various possibilities n works out which address to use.			* 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.

Caregivers	'	Financials
Step 1 Select caregi	ver	Postal zip code
First financial = Yes	-	Physical address 1
Caregiver 3 Caregiver 4	^	Physical address 2
Caregiver 5 Caregiver 6		Physical address 3
Caregiver 7 Caregiver 8	=	Physical address 4
Emergency contact First financial = Yes		Physical address 5
First report = Yes Second financial = Yes	Ţ	Home phone
Postal address 1	s ·	Work phone
Postal address 2		Fax number
Postal address 3		Cell phone
Postal address 4	_	Other phone
Postal address 5		Email address

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".

E All Documents	Student : Aa A	Year : 14 Class : KOTUKU Room : GREY
	Student's Physical Address Preferred * (from Personal details)	Student's Postal Address Preferred *
	Mail to whom A	
	Address 1 add1	Postal address 1
Personal details.dmt	Address 2 add2	Postal address 2
Caregivers.dmt	Address 3 add3	Postal address 3
Medical.dmt	Address 4	Postal address 4
Historical a.dmt	Address 5	Postal address 5
Sensitive.dmt	Postal code	Postal code
 Leaving details.dmt Photo album 1-6.dmt Financial.dmt 	Copy >	< Copy
 Pastoral.dmt flags.dmt 	Mail to greeting	Geocode
FCPersonal details.dmt Default notes.dmt personalnotes.dmt ENROLPersonal details.c	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	Send invoices to 'Mail to whom' (above) Send reports to 'Mail to whom' (above)
	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.	* More information
		Close

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".

All Documents	Student : Aa A			Year : 14 Class : KOTUKU Ro	om : GREY		A A
		Physical Address Personal details)	Preferred *	Student's Postal Address	Preferred *		
	Mail to whom	A				_	
	Address 1	add1		Postal address 1			
Bersonal details.dmt Caregivers.dmt Timetable.dmt	Address 2 Address 3	add2 add3		Postal address 2 Postal address 3			64 of 531

The program will look at the "Caregiver's" page to determine which address to use for the Invoice or Statement.

Currently listed	Right-click to delete	Family name	A		Home phone		
A, Mrs Catherine	Mother	First name	Catherine		Work phone		
		Title	Mrs		Fax number		
		Relationship	Mother	•••	Cell phone		
		Postal	Address 1		Other contact		
		Address	Address 2		Email address		
		Preferred			Logon ID		
		What Does 'Preferred'			Password		
Move Up	Move Down	Mean?		_	Languages		
		Postal code			School 1		-
Select a New Careg	iver for this Student	Physical	Add 1		assistance 2		
Add a New	Counting	address					-8
Add a New	Caregiver	Preferred	Add 1		3		-
otes		Autocopy			Flags 🔛 4		•
otes		address 📄			Invoices	🗸 Solo Parent	
		changes			Reports	 User Flag 2 	
		Occupation		• •	Voting rights	✓ User Flag 3	
		Workplace			Emergency	Userflag4	
		workplace			Living with	✓ Userflag5	
			with this caregiver		Legal Guardian	Userflag6	
		(double-click to	o move to a sibling)		Access rights	✓ Userflag7	
					Si	ave Changes	

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).

Currently listed	Right-click to delete	Family name	A
A, Mrs Catherine		First name	Catherine
-		Title	Mrs
		Relationship	Mother 👻 🖤
IUSAC 2014		Postal	Address 1

Yes

(es

Fill this column with...

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

Mail to which

- 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)

Ascending Sort

Descending Sort

Standard Sorts

Apply Quick Filter

Column data functions

3. Right- click on the header. Select "column data function" and fill the column with....."

۶

•

•

۲

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".

	·
3. Fill this column with	
Column Type : Numeric	
Your own number	
A 'calculated' result	
The contents of another column	
Record zero results as Zero C Leave blank	
Proceed Cancel	



Step 1 Select caregi	iver
Caregiver 1	-
Caregiver 1	
Caregiver 2	-
Caregiver 3	
Caregiver 4	
Caregiver 5	=
Caregiver 6	
Caregiver 7	
Caregiver 8	
Emergency contact	



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	Cł
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	Sh
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	Sh
02/02/2007	10	10WL	RLIS	Full time			RE	07/02/2006	No entry	Be
05/02/2007	10	10WL	PWLR	Full time			RE	07/02/2006	No entry	Be
20/02/2007	10	10MA	PWLR	Full time			RE	07/02/2006	No entry	Sh
20/02/2007	10	10MA	PMAR	Full time			RE	07/02/2006	No entry	Sł
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	Sł
<				nu -						>

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 ethnicit	ies 1	Maori
MoE ethnicit	ies 2	
MoE ethnicit	ies 3	
lwi 1	Ngäti Tüwh	aretoa
lwi 2	Ngäti Porou	1
lwi 3		
		Minister Details 0
		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.

۲	Medical
Fig	ure 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.

6 CARGILL STREET EVIN		Dhara	test Address shows	
nysical address : 6 CARGILL STREET EVIN Felect those which you wish to automatically update with changes made Type Address Name Student Physical ABBUTT, COLIN GEOFFREY Caregiver Physical Mr ABBUTT Caregiver Postal Mr ABBUTT Caregiver Physical Mrs ABBUTT Caregiver Postal Mrs ABBUTT Caregiver Postal Mrs ABBUTT		Phys	ical Address change	
EVIN 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	ne address s	hown has bee	en found on the following other students and/	or caregivers
6 CARGILL STREET EVIN 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	nysical addre	ess :		
EVIN 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 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 Postal Mr ABBOTT Caregiver Postal Mrs ABBOTT		STREET		
Type Address Name Student Physical ABBOTT, COLIN GEOFFREY Caregiver Physical Mr ABBOTT Caregiver Postal Mr ABBOTT Caregiver Physical Mrs ABBOTT Caregiver Postal Mrs ABBOTT				
Type Address Name Student Physical ABBOTT, COLIN GEOFFREY Caregiver Physical Mr ABBOTT Caregiver Postal Mr ABBOTT Caregiver Physical Mrs ABBOTT Caregiver Postal Mrs ABBOTT Caregiver Postal Mrs ABBOTT				
Type Address Name Student Physical ABBOTT, COLIN GEOFFREY Caregiver Physical Mr ABBOTT Caregiver Postal Mr ABBOTT Caregiver Physical Mrs ABBOTT Caregiver Postal Mrs ABBOTT Caregiver Postal Mrs ABBOTT				
Student Physical ABBOTT, COLIN GEOFFREY Caregiver Physical Mr ABBOTT Caregiver Postal Mr ABBOTT Caregiver Physical Mrs ABBOTT Caregiver Postal Mrs ABBOTT	elect those	which you wi:	sh to automatically update with changes mad	e
Student Physical ABBOTT, COLIN GEOFFREY Caregiver Physical Mr ABBOTT Caregiver Postal Mr ABBOTT Caregiver Physical Mrs ABBOTT Caregiver Postal Mrs ABBOTT	Tune	- 	Nerre	
Caregiver Physical Mr ABBOTT Caregiver Postal Mr ABBOTT Caregiver Physical Mrs ABBOTT Caregiver Postal Mrs ABBOTT	and the second	1.		-
Caregiver Postal Mr ABBOTT Caregiver Physical Mrs ABBOTT Caregiver Postal Mrs ABBOTT				
Caregiver Physical Mrs ABBOTT Caregiver Postal Mrs ABBOTT	Caregiver	Phusical		
Caregiver Postal Mrs ABBOTT				
	Caregiver	Postal	Mr ABBOTT	
Select all	Caregiver Caregiver	Postal Physical	Mr ABBOTT Mrs ABBOTT	
Select all	Caregiver Caregiver	Postal Physical	Mr ABBOTT Mrs ABBOTT	
Select all	Caregiver Caregiver	Postal Physical	Mr ABBOTT Mrs ABBOTT	
Select all	Caregiver Caregiver	Postal Physical	Mr ABBOTT Mrs ABBOTT	i.
Select all	Caregiver Caregiver	Postal Physical	Mr ABBOTT Mrs ABBOTT	d
Select all	Caregiver Caregiver	Postal Physical	Mr ABBOTT Mrs ABBOTT	d
Select all	Caregiver Caregiver	Postal Physical	Mr ABBOTT Mrs ABBOTT	l
	Caregiver Caregiver	Postal Physical	Mr ABBOTT Mrs ABBOTT	l
	Caregiver Caregiver Caregiver	Postal Physical Postal	Mr ABBOTT Mrs ABBOTT	ļ

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.

a contract of the second		: IUWA Year -	:10 Tutor:10W	IA				
Currently listed	Right-click to delete	Family name	1000		Home phone	13	35	
	Mother	First name	iner ga		Work phone			
ck		Title			Fax number			
ALTER STREET	Grandmother	Relationship	Mother	~ ···	Cell phone	_		
		Postal			Other contact	-		
		Address			Email address	C	Dxtra.co.nz	
		 Preferred 			Logon ID			
		What Does			Password			
		'Preferred' Mean?			Languages			
Move Up	Move Down							
Select a New Caregiv	er for this Student	Postal code	0000		School 1 F	(emedi	al Read.	*
		Physical			2			~
Add a New 0	Caregiver	address			3			~
					Flags 🛄 4			~
Notes		Autocopy address 🔽			Invoices	1	Solo Parent	
		changes			Reports		User Flag 2	
					Voting rights		User Flag 3	
		Occupation	Care Worker		Emergency		Userflag4	
		Workplace	Care Worker Care Worker (Nursin		Living with		Userflag5	
		Other students	Care Worker (Nursing)	-	Legal Guardian		Userflag6	
		(double-click to			Access rights	~	Userflag7	
			Carpenter Carpet Laver					
			Carver			Save C	hanges	

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.

School 1 assistance	N 1	-
assistance 2	Board member P.T.A.Chairpsn	*
3	Fund raising	
Flags 🛄 4	Gala help P.T.A.	
Invoices	Staff member	
Reports	Telephone appl Working Bees	
Voting rights	Chairman of Bd	
Emergency	Spt Managing 📃 🔊	٢,

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.

Board member	^	
P.T.A.Chairpsn		
Fund raising		
Gala help		
P.T.A.		
Staff member		
Telephone appl		
Working Bees		
Chairman of Bd		
Spt Managing		
Spt Coaching		
Maori Par.S/G		_
PasifikaWhanau		Insert
PTA		
Computers		
Bone Carving		
Remedial Read.		
Other	×	
Should the list of possibilities for this popup be sorted?		
Save Back		

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.

Autocopy	
address	
changes	

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		
DACCETT M			

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.



Make your selection from the popup list of possibilities.

Relationship		▼
Postal Address	Aunt Brother	^
Addiess	Cousin	
Autocopy address 🔽 changes	Father Grandmother Half sister Mother Niece	-
Postal code		

Figure 88: The caregiver relationships

Currently listed caregivers		Endance /		
ARMSTRONG, Mr	Father	First name		
ARMSTRONG, Mrs	Mother	Title	Mr	
BAINBRIDGE, Mr	Cousin	Relationship	Cousin	•
		Postal Address Autocopy	Cousin Father Grandmother Half sister Mother	

Each caregiver can also have various 'Flags' set. The first seven have been named, leaving the

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.

Flags 🔛 4		•		
Invoices		Solo Parent		
Reports		User Flag 2		
Voting rights	4	User Flag 3		
Emergency		Userflag4		
Living with		Userflag5		
Legal Guardian		Userflag6		
Access rights	4	Userflag7		
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 detail	s 📔 Unconnected caregiv	ers 📔 Global editing	of caregivers
You may wish to hide one or m You may return at any time to		lake that selection below.	
N.B. Those which are ticked	will be visible	Optional contact details	
Optional address details		Fax number Cell phone	✓✓
Postal address line 4	\checkmark	Other contact	✓
Postal address line 5	\checkmark	Email address	
Zip code		Logon ID	
Physical address line 1		Password	\checkmark
Physical address line 2			
Physical address line 3		Optional assistance det	ails
Physical address line 4		School assistance 1	
Physical address line 5		School assistance 2	\checkmark
		School assistance 3	
Caregiver notes		School assistance 4	
Other students with this caregiver	5 ☑		

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.

-	er defaults ng default settings	will apply to new caregivers	when you click or	n the 'add a new ca	regive	er' button				
aregive	r 1		Caregiver	2			All others			
tle	Mrs		Title	Mr			Title			
elationship	Mother	~	Relationship	Father	~		Relationship	Emergency	~	
ags	Invoices	✓ Solo Parent	Flags	Invoices	~	Solo Parent	Flags	Invoices		olo Parent
	Reports	✓ User Flag 2	rings	Reports	1	User Flag 2	r logs	Reports		Jser Flag 2
	Voting rights	 User Flag 3 		Voting rights	1	User Flag 3		Voting rights		Jser Flag 3
	Emergency	Userflag4		Emergency		Userflag4		Emergency	1	Jserflag4
	Living with	✓ Userflag5		Living with	1	Userflag5		Living with	1	Jserflag5
	Legal Guardian	✓ Userflag6		Legal Guardian	1	Userflag6		Legal Guardian	1	Jserflag6
	Access rights	✓ Userflag7		Access rights	1	Userflag7		Access rights		Jserflag7

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.

Global caregiver	rs utilities			
Hiding fields	Default details Unco	onnected caregivers	Global editing of caregivers	<u> </u>
Unconnected The following care	_	d as not being associated	with any students.	
AD ALI AS BA BI BR BU CIF CU DU DU ESI ETI FIF FIF FIF FIF FIF FI HA HA HA HI HI	ehn/Kathleen ;			
Select All	Delete Select	ed		

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.

liding	fields	Default de	etails 📔	Unconnec	ted caregivers G	ilobal editing of careg	ivers				
Ed	iting car	egivers	s Ed	liting care	egivers' relations	hips and flags					
amil	y name	First n	ame	Title	Postal address 1	Postal address 2	Postal addres	ss 3 Postal address 4	Postal address 5	Zip code	
51	/E	C		Mr	j	Ku Yokohama	I awa JA	PAN			
		k		Ms	treet	ANUI					
D		N.	1	Mr							
2	IN	P	6	Miss	Street	ANUI					
0)	k		Mr	Brance and	in Road	ANUI				
3		F		Mrs	en Road	DN					
М		k	g	Mr	ui Yick Ha	i Wan Estate	: Wan H	HONG K			
1		I		Mrs							
c		1	D	Mr	it Road	ANUI					
)	/S	k		Miss	Avenue	ANUI					
3		5		Miss	Street	ANUI					
1		C		Mr	ia Road	ANUI					
	R	1		Mrs	ot Stree	ANUI					
1		A.	1	Mr	ot Stree	ANUI					
)	IRE	C		Mr	Road	3aehu Village	ANUI				
l		k		Mrs	(Road	DTARA					
	К	k		Mrs							
6		P.		Mr	hael Youn	x 2626	uilding	10.000 PT 20			
٨	IO	L	е	Miss	Harrison	ANUI					
		C		Mr	ro Street	ANUI					
1		F		Mr	Crescent	ANUI					
1	JFU	1		Mrs	l Avenue	ANUI					
1		1		Ms	va Street	ANUI					
	DS	N	2	Mrs	Street	ANUI					
0	BAKI	5		Mrs	ice	ANUI					
1		C		Mrs							
4	.s	1	ne	Mrs	Street	WANGANUI					

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.

Editing caregivers	Editing caregivers' relatio	nships and	flags									
Caregiver	Student	Relationship	Invoices	Reports	Voting right	Emergency	Living with	Legal quar	Access (df	User Fleg	Uper F	2.0
MrABBOTT	ABBOTT, COUN GEOFFREY	Father	No	No	Ves	No	Yes	Yes	Yec	No	No	
Mrs ABBOTT	ABBOTT, COLIN GEOFFREY	Mother	No	No	Yes	No	Yes	Yes	Yes	No	No	12
none	ABBOTT, COLIN GEOFFREY	Uncle.	No	No	No	No	No	No	No	No	No	
MIALDERTON	ALDERTON, KELVIN GEOFFREY	Father	No	No	Yee	No	Yez	Yes	Yee	No	No	
Mrs ALDERTON	ALDERTON, KELVIN GEOFFREY	Mother	No	No	Yee	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	
MLARMSTRONG	Amstrong, Jennifer Joan	Father	No	No	Yes	No	Yes	Yes	Yes	No	No	
MII ARMSTRONG	Amstrong, 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	
MIARNOTT	ABNOTT, LEIGH HELEN	Father	No	No	Vec	No	Yes	Yes	Yec	No	No	
Mre ARNOTT	ARNOTT, LEIGH HELEN	Mother	No	No	Yes	No	Yes	Yes	Yee	No	No	
MrARTZ	ARTZ, CHERIE MAI	Father	No	No	Yes	No	Yes	Yes	Yee	No	No	
Mm 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	Yee	No	No	
Mrs BAINBRIDGE	BAINERIDGE, 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	
MIS BARR	BARR, CHRISTOPHER	Moher	No	No	Yes	No	Yes	Yes	Yes	No	No	
MIBARRETT	BARRETT, MONIQUE CATHRIN-	Father	No	No	Yes	No	Yes	Yes	Vec.	No	No	
Mrs BARRETT	BARRETT, MONIQUE CATHRIN-	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	Yee	No	Yes	Yes	Yes	No	No	
Mrs BARRIE	BARRIE, NOEL LINDSAY	Mother	No	No	Yes	No	Yes	Yes	Yee	No	No	
Mr BASSETT	BASSETT, LEIGHANNE	Father	No	No	Yes	No	Yes	Yes	Yes	No	No	
MrBASSETT	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	1.0
e			44	1997			11			81	* >	10
N				_	_	_	_	_				-
					338			9225	92	12	Ext	

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	Accident Register
Condition Degree Medicine held Detail	Close
ASD (Austic Spectrum	
OCD (Obsessive	
ODD (Oppositional	
Medical notes	Doctor
Fluoxitine Med.	Phone : 34 225 Address : 76 St
	Dentist / Dental nurse
Hearing	Notes
Vision	
Speech	Emergency contact Daa Carre Details Details
	Hom Details
Immunisation register Certificate shown Immunisation Complete	·
Hepatitis B Tetanus Measles Diphtheria Rube Polio Pertussis Mumps HIB Meningood	
Comment	Community card number 02646123030

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.

irrent medical providers			
dams ddis	^	Name	Barclay
kroyd T Iderson		Initials	S
ldridge L llen J		Phone	234 5678
marasinghe N mer		Address	Balmoral Medical Centre
ntunovich pparna ppleby vondale Health Cent aird aker almoral D Centre	12435555565	Notes	Simon will come to the school if necessary.
arclay, S arryRam ji eck ett D eer C ettowski	Chick Sector		
hakta ills Daniel			Add a new medical provider
ishop laiklock			Save changes
lockhouse Bay Med lyth			Delete selected provider
otica owden	~		

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.

٨	edica	l prov	ider no	tes						
t	lotes	s relat	ting to	: S Ba	rclay					
	Simon	will com	e to the s	chool if r	necessary				1000	_
						Save a	nd exit		ancel	
	M. S. C.	1	1 del		1.1.1.			L		

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	1221	174 23	-
Certificate show	n 🔽 Immuni:	sation Compl	ete 🔽	
Hepatitis B Polio Diphtheria Comment	Tetanus 🔽 Pertussis 🔽 Rubella 🔽	Measles Mumps HIB		についてい
Emergency co	ntact	939	14.72	
Mr BAINBRI Cousin Home phon Work phone	e : 354 6543		D	etails

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.

Occupational Safely and Health	🕒 Occupi	ational Safety a	and Health								
Incident reports Cick in colders Name of report [008] Gander Jobatis Jogare Status Employment pell Treatment Time did Stati Time incle and De Time Repolatas Record tool: Name of report [008] Gander Jobatis Jogare Status Employment pell Treatment Time did Stati Time incle and De Time Repolatas Record tool: Name of report [008] Gander Jobatis Jogare Status Employment pell Treatment Time did Stati Time incle and De Time Repolatas Record tool: Name of report [008] Gander Jobatis Jogare Status Employment pell Treatment Time did Stati Statis Time incle and Statis Time incle and Statis Time incle and Add a rem incle/er Statis Diplay and Employment Employment Employment	Occupa	ational Safe	ty and Health	OGH Websi	ite						
Dete Tine Reptatus Place of such Nere of vigues DOB Gender Jobble Injuned Status Enployment per Treatment Tine dot Stat Tine since at Add a new incoder Search for roddeni Search for roddeni Search for roddeni Search for roddeni Search Tine incoder Search for roddeni Search Tine incoder Search for roddeni	Incident	reports Othe	er OSH processes								
Ad a new incider: Seach. Display al	Incid	lent reports		Click in colur	nn headings to soit ascending	g / descending					
Add a new incident Search to incident Search Display all	Date	Time	Repstatus Place	of work	Name of injured DOB	Gender	Jobtitle	Injured Status Employment per Treat	ment Time slot	Shift	Time since atti
Add a new incident Search to incident Search Display all											
Add a new incident Search to incident Search Display all											
Add a new incident Search to incident Search Display all											
Add a new incident Search to incident Search Display all											
Add a new incident Search to incident Search Display all											
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Close		a charte monardi fi	containing the text	t ha set							
											Close

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.

musac

Index report Other SHI processe For al fagible for an olificability of discustability of serious and safely in fanjoured had 1352. Environing accodent comparing accodent accodent accodent accodent accodent accodent ac	Form of engister or notification of circumstances of accident or serious harm Pequeted for sector 20(1), (1A), (1B), and (300) of the Heath and Stately in Engiptime Act 1922 For notifying accident, complete quetions 1, 2, 3, 3, 10, 11, 14 and 15 as splicable Particular of Employee, network actions on principal: Automation of Employee, network actions on principal: Automation of place of work Potal address: 2 The person reporting is : 3 1 1 1 2 1 2 1 2 1 2 1 2 3 1 2 1 2 2 1 2 2 3 1 2 3 1 2 3 1 2 4 1 2 2 3 2 3 2 3 2 4 2 4 2 4 2 2 3 2 4 2 4 2 4 2 2	Form of register or notification of circumstances of accident or serious harm Request for rectin 2(1), [1A], [1B], and [2B] of the Hash and Stade by in frequence Act 1932 For norrive scaled, coupler genetics 1, 2, 3, 9, 10, 11, 14 and 15 as agained 1 Porticulater of Employer, scale Homployed person or principal: durines name: Ports addees: image: scale 2 The person reporting is : 3 Location of place of work States and the scale of the sca
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		Hours worked since arrival at work
Save changes Delete this incident Print reports Investigation report Incident list	Save changes Delete this incident Print reports Investigation report Incident list	
		Save changes Delete this incident Print reports Investigation report Incident list

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.

7 Period of employment o	f injured person	
(employees only)	✓	
8 Treatment of injury		
o rreatment of injury	`	
9 Time and date of accide	ent / serious harm	
Time	Date	
Hours worked since arrival at wo		
/employees and self-employed pe		
Shift 🔍		
10 Mechanism of accident	t/serious harm	What is 'Serious harm'?
	~	OSH provide a document
11 Agency of accident / se		which answers this question. If
TT Agency of accidency se		you have Acrobat Reader installed then you can view it
	~	here.
12 Body part	~	View document
13 Nature of injury / disea	se <i>(specily all)</i> □ Fatal	,
15 Nature of Injury / disea	se / specity all/ 🗌 Fatal	
fracture of spine		ise, musculoskeletoal system
other fracture		ise, skin
dislocation		ise, digestive system
head injury		se, infectious or parasitic
internal injury or trunk		ise, respiratory system ise, circulatory system
amputation, including eye		ur (malignant or benign)
open wound	In the second s second second sec	al disorder
superficial injury	disease, nervous system	
14 Where and how did the	accident / serious harm hap	pen?
		·
15 If notification is from a	n employer :	
Has an investigation been carrie		
	0100 0110	
Was a significant hazard involv		
	ed? OYes ⊙No	
Save changes Delete this		Investigation report 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	Website
Making a difference! Accident in	nvestigation
Name of organisation : Branch/Depatment : Muriel Gym Club	NB To move to another line in the multiline entries (e.g. Address), press Cntrl-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 Porter Ac	Idress
	logwarts Street HANGABEI
Length of employment - at plant - on job	
Type of injury Laceration/cut v or Other (specify)	
Injured part of body facial injuries Remarks	
DAMAGED PROPERTY	
Property / Material damaged	
There was guite an amount of damage caused to the surrounding walls v	vith all manner of strange events occuring.
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
Coro onargoo Donto une modern Print reputs	

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.



Representatives	Hazard management Incident reports Printing options OSH	Contacts
	R 4 1/2)) Q • 🎒	
Print hazard list Print selected incidents Print selected investigations Print both	Form of register or notification of circo R equired for section 25(1), (1A), (1B), and (3)(b). For non-injury accident, complete questions 1. Particulars of employer, self employed person or principal: (business name _ postal address and telephone num ber) Business name _ MUELC Postal address Taupo 2 The person reporting is 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	12 Body part multiple locations 13 Nature of injury / disease (<i>specify all</i>) Fatal Yes
	Figure 104: A printed	incident report

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

Representatives	Hazard management Incident reports Printing options OSH Contacts
	K 4 2/2 > H Q - B
Print hazard list Print selected incidents Print selected investigations	Making & difference! Making & difference! Name of organisation : MUELC PARTICULARS OF ACCIDENT
	D ate of accident Time Location D ate reported 10/01/2005 8.05 am In the boy's' looker room 10/01/2005
	THE INJURED PERSON
	Name: Freddy Meroury Address: 14 John Street Age: 16 Phone number: 123:4667 27:W oodfield Grove Levin Levin Date of accident: 10/01/2005 or W anganui
	Length of employment - at plant : 4 Length of employment - on job : 2
	Type of injury : Injured part : Big toe right foot
	R em arks : Painfull
	DAMAGED PROPERTY
	Property / material damaged : Actually there was quite a lot. When Jimmy kicked Freddy he slipped and created in the vioinity of the sink. Nature of damage : Quite a bit of waterlogging was experienced in the vioinity of the sink.
	of strange events to occur. Dbject.substance inflicting damage : Styrangely, nothing but Jimm y'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 a follows. You can return to editing a particular incident by double-clicking on the relevant row of the list.

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 10:30:00 a.m. 08/02/2005 A principal Outside the T-block JAMES JEREM 28/02/199! M 8:45:00 a.m. 11/02/2005 A principal In the darknoom JAMES JEREM 28/02/199! M				•	OGH Website	lealth	y and Hea	al Safet	ccupation
Date Time Repstatus Place of work Name of injured DOB Gender 10:30:00 a.m. 08/02/2005 A principal Outside the T-block JAMES JEREM 28/02/199! M						sses	OSH processes	Dther I	Incident reports
10:30:00 a.m. 08/02/2005 A principal Outside the T-block JAMES JEREM 28/02/199 M		lescending	ascending / d	headings to sort a	Click in column			eports	Incident r
· · · · · · · · · · · · · · · · · · ·	Jobtitle	Gender	DOB	Name of injured	ork	Place of w	Repstatus	Time	Date
8:45:00 a.m. 11/02/2005 A principal In the darkroom JAMES JEREM 28/02/199 M	Student	М	28/02/199!	JAMES JEREM	e T-block	I Outside th	A principal	08/02/2005	10:30:00 a.m.
	Student	М	28/02/199!	JAMES JEREM	room	I In the dark	A principal	11/02/2005	8:45:00 a.m.

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 Sa	afety and Health	OSH Websit	te		
Incident reports	Other OSH processes				
H I	1/2) H Q -	<u>_</u>			
	Name of organis.	Making a difference!	Accident	Investigation Branch/Departmer	
Print both	PARTICU D ate of acc 08/02/2005		Location		Date reported 21/02/2005
	Name : JAM Age : 10	IRED PERSON MES JEREMY ABACROMBIE Phone number : ident : 08/02/2005		Address: 16 CARGILL STREET LEVIN	
	Length of e	mployment - at plant :		Length of employment- on job :	
	Type of inju	iry :		Injured part :	
	Remarks :				
	DAMAGE	D PROPERTY			
	Property / m	naterial da maged :		Nature of damage :	

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....

<u></u>			
Proceed to printing	Search for incidents containing the text :	Search	Display all
	Eigure 109: Buttons on lower	scroon	

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 an you may move backwards and forwards through the printed pages using the arrow buttons pointed at below.



Representatives Hazard management Incident r	eports Printing options OSH Contacts
1/4) n q • B	
	orm of register or notification of circumstances of accident or serious harm (led for section 25(1), (16), (16), and (3)(b) of the Health and Safety (1) Employment Act 1992
incidents	For to t-hijt ny accide it, com plete questions 1, 2, 3, 9, 10, 11, 14 and 15 as applicable uployer, selfem ployed person or principal: 9 Time and date of accident / serious harm
Print selected investigations Postal address	Im e (80,5 am) Im UELC Date Hours worked since arrival atwork
Татро	(em ployees or sef-em ployed persons only 1) 10 Mechanism of accident/serious harm
Tekpiose sambe	soud or pressue
Figure 109: Th	e 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.

Occupational Safety and Health OSH Website	
Incident reports Other OSH processes	
Other OSH processes	
This utility is an extract from the full OSH module contained in MUSAC's Staff Manager	
In Staff Manager you can :	
- Maintain a list of your OSH representative(s)	
- Maintain a list of identified hazards and the policies which you have put in place to mange them	
 Access ALL incidents and accident investigations (involving students and staff members and other employees) 	
 Search the full database for particular incidents / investigations. 	
- Print selected incidents / investigations and lists of hazards	
- Directly access a list of OSH offices and contacts	
Contact MUSAC (or a MUSAC agent) for further information regarding Staff Manager	

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.

	EDUCATION	for Jennifer Joan Armst	
Natl Student Ind	ex	MOE y	rear 11
Status	Full time	 Date of Birth	21/05/1986
	Regular student	Date started any school	01/01/1991
Type Full Time		Date started here	01/01/1991
Equivalent Gender	Female		State of State of
The second second	New Zealand	Special Ed.	
Vationality		Special Ed. Hours	
Zoning Status 🛛	n zone	ORRS	
Previous , school	Adventure School	Changes of school	2
Childhood	nded Kindy/Playcentre etc	Foreign Fees Paid	
Education L	and the second second second second	Min	istry Details 2
F	eturn to Personal Details	Ministry	Details for Leavers

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.

MINISTRY OF EDUCATION Tr Tithshv o te Mätsuren ya	Details for Jennifer Jo	oan Armstrong
Maori Language Learning Index	eo separately < 3hrs/week	
Pacific Medium - Language		
Pacific Medium - Level		Ministry details 1
MoE ethnicity 1 New Zealand	Maori	
MoE ethnicity 2	63	Ministry Details for Leavers
MoE ethnicity 3		Return to Personal Details
lwi 1 Ngäti Tara Tol	canui	
lwi 2 Horouta		
lwi 3	1	

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	Probability of Returning 1
в	11MUOA	
Č.	11MANU	- and the set of the set of the set of the
D	11MDPA	and the part that we that we
E	11GEGP	
F	11ACHG	I preased preased from the
W		and the second second second second second
X		
Y	0	
Z		
L		and all show all and a start of the start of
M	8	
N		
0		with a set of the set of the set of
		Edit options
2		
	0	
		View option sets
22		
		Vew timetable
2		
	6	

Figure 113: The student's options document

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

electe	ed option set	This ye	ar's options (a	ttache	d to colu	mn set 1		-	Year:	2003	-			
tuder	it's current opt	ions				Sele	ct option:	s from :		1.3		Student's co	re subjects	
Line	Option	Pin M	larkbook	~	Pre	evious	1		-	Next	1	Subject	Markbook	-
1	11TY_WK	1	1TY 2003		-	1	-	1. A. A.				11PE_	11PE 2003	3
2	11MU_0A	1	1MU 2003		Key	Option		No.	Markbook		~			
3	11MA_NU	1	1MA 2003		A									
4	11MD_PA	1	1MD 2003		B									
5	11GE_GP	1	1GE 2003		C									
6	11AC_HG	1	1AC 2003		D							1		
7					E							2		1
8					F							-		
9					G									
10					Н									
11														
12					J									-
13				- 1	K									1
14					L									
15					M									-1
16				- 11	N							-		-
17					0									-1
18					P							1		-
19					Q									
20					R									1
20					S							2		Ē
21					T									1
22					Ú							<		ļ
23					V									
24 25				~	Ŵ							Print cha	nge notificatio	n
Pir	n all	Save	changes		Rec	ount	To view on the	class me number	embers righ column ab	t-click	Vie	w all of studer	it's option sets	

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).

Fo	orm 4	Form 5		_	Form 6	6
Key	Option		No.	Markbool	k	~
Α	11MA H	P	9	11MA 20	03	
В	11EG P	K	6	11EG 20	03	
С	11WW	PA	3	11WW 2	003	
D	11EG R	T	6	11EG 20	03	
Е	11GE P	Г	9	11GE 20	03	
F	11HI M0)	5	11HI 200	3	
G	11MW [DV .	12	11MW 20	003	-
Н	11SC D	N	24	11SC 200	03	
1	11MA B	A	21	11MA 20	03	
J	11TY W	κ	8	11TY 200	03	
К	11MA B	Т	10	11MA 20	03	
L						
М						

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	1	11TY 2003	
2	11MU_0A	1	11MU 2003	
3	11MA_NU	1	11MA 2003	
4	11MD_PA	1	11MD 2003	
5	11GE_GP	1	11GE 2003	
6	11AC_HG	1	11AC 2003	
7	2000 A			
0				

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.

Eder, Sa Hannah Mauchli	i, Carey ine, Karl		
Sutton, Tait, Te	drian on, Brendon Brent rrance		
	Nathan y, Darren		

Figure 117: The members of an option class

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

tude	lent : Armstrong, Jennifer Joan		it : Armstrong, Jennifer Joan Option sets for				2003 -
Line	Set 1 2003	Set 2 2003	Core 2003				
	This year's options	Unconnected !!!	Compulsories				
A.	11TYWK	11TYWK	11PE		and the second		
В	11MUOA	11MUOA					
С	11MANU	11MANU					
D	11MDPA	11MDPA					
E	11GEGP	11GEGP			32 120		
F	11ACHG	11ACHG					
W					and a state of the		
X					1 Same		
Y					1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1		

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 sel	ection details
Default sett	ings 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 (per cell only)	3 lines C Code 🔹 Full name from timetable
	days and periods are determined 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.

Select	Year : 2003	Option set : 1 -	This year's o
	MON	TUE	WED
Period 1	PE	SS	ЕС
	PETERS M	THRUPP M	РІТТИСКІМ
	GYM	8	Т4
Period 2	SC	EG	MM
	RILEY K	PITTUCK M	CLARKEN
	2	T4	T5
Period 3	MM	MM	SS
	CLARKEM	CLARKE M	Thrupp N
	T5	T5	8
Period 4	SS THRUPP M 8	AM KAIN L Art	8 SC RILEY K 2

Figure	120.	Δ	student's	timetable
Iguie	120.	A	student s	linelable

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.

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
	-						

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.

dit Links V	iew Options A	utomatic payments Practice area						
Student : A	ARMSTRONO	G, JENNIFER JOAN		Yea	ar:11 Fo	orm : Gr	oup :	
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.

Financial details for JI	MMY ABACROMBIE
Current debt totals	
Current total debt	: \$145.60
Current month Outstanding one month Outstanding two months Outstanding three months Outstanding four months Outstanding more than four m	: \$120.00 : \$45.60 : \$ 0.00 : \$ 0.00 : \$ 0.00 : \$ 0.00 nonths : \$ 0.00
Bank Account 123	-456-7680
Pays by autopayment	
Return to Finan	cial Details

10.8 Pastoral transactions

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

tudent : J	IMMY AE	BACROM	BIE Year : 4	Class : 9HG	Room : long
Date	Tchr	Туре	Details		Action Pts
6/06/2004	CL	Offence	Unsafe Play	Time	Out
8/06/2004	BK	Offence	Gambling	Step	1
9/06/2004	NU	Offence	Stealing	Step	2

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.

ব ব
-
17
V

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 XXXXX	05/04 XXXXx XXXX	c 05/07	04/10
12/01 XXXXX XXXXX	12/04 ccXXX ccXXX	K 12/07	11/10
19/01 XXXXX XXXXX	19/04 XXXXX XXXXX	0 19/07	18/10
26/01 XXXXX XXXXX	26/04 XXXXX XXXd	X 26/07	25/10
02/02 XXXXX XAAAA	03/05 XXXXX XXXX	X 02/08	01/11
19/02 XXXXX XXXXX	10/05 XXXXX XXXX	X 09/08	08/11
16/02 XXXXX XXXXX	17/05 XXXXX AAXX	X 16/08	15/11
23/02 XXXcX XXXcX	24/05 XXXXX XXXX	X 23/08	22/11
01/03 XXXXX XXXXX	31/05 XXXXX XXXX	X 30/08	29/11
38/03 XXXXX XXXXX	07/06 cXXXX cXXXX	x 06/09	06/12
15/03 XXXXX XXXXX	14/06	13/09	13/12
22/03 ccccc ccccc	21/06	20/09	20/12
29/03 ccccc ccccc	28/06	27/09	27/12

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).

MoE ethnicities 1	Other groups	New Zealand Maori	
Religious AffIn 1	Methodist		
Immunizations 1	Measles/Mumps		
Old ethnicities 1	Malay		
Category 5 1	ar e la construcción de la const		
Category 6 1	13		
Excursion 24/8s 1	Library		
Category 8 1			
Category 9 1	1		
Daughter of O.G 1			
Category 11 1	and the second s		
Category 12 1	2	2	
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 991	MERIT 99	4
1	Mrt Cert94	4
1	Mrt Awards 2001 Ct	4
Mrt 2000 1	Mrt 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	Mrt Cert 96	4
Page Break		
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
		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.

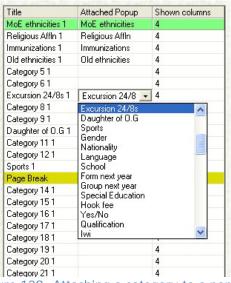


Figure 129: Attaching a category to a popup

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 AffIn 1	Religious AffIn	4
Immunizations 1	Immunizations	4
Old ethnicities 1	Old ethnicities	4
Category 51		4
Category 6 1		4
Category 81		4
Category 91		4
Daughter of 0.G 1	Daughter of O.G	4
Category 11 1		4
Category 121		4
Sports 1	Sports	4
Page Break		
Excursion 24/8s 1	Excursion 24/8	4
Category 14 1	1	4
Category 15.1	120 Addition	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.

musac

Available popup lists	Hobbies
2001 Merit Badge 2001 Merit Cert Current Career Ideas Destination Extra Curr Activities EXTRA CURRICULAR First Language Foreign Language Hobbies INTERNET USER Maori Language Lrng Index Merit 99 MERIT 99 Merit Award 2001 Mrt Awards 2001 Ctd Mrt Cert 96 Mrt Cert 94	Acting Astronomy Athletics Brass Band Camping Caring for animals Computers Fitness Music Photography Playing in Band Sports Stamp Collecting Tramping Video Games
NZQA address choice 🛛 🔛	
Should the list of possibilities for this po	pup be sorted? 🔽
Create a new popup list	Save Exit
Retur	m to renamables configuration

Figure 131: Adjusting popup entries

10.11 School-defined fields

Bike stand no.	1253	Fees '91	\$1500
Title 2	1.	Title 4	100
Title 5		Title 7	12.1
Title 6	1	Title 8	
Title 9		Title 11	11
Title 10	-	Title 12	1.1
Fathers Work	and the states	the call of the call	
Mothers work			
Title 14	-		1222222
Title 16	3		President and
Title 15	and the second second	and the state of the state	
Title 18			
Other siblings	Jessica Mary i	in 11HG	
Title 20		Title 22	
Title 21		Title 23	

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.

ocation a	nd use of School	defined fields	
view data	1234		
No.	Student	Data	
24	1		
0			
1			
0			
0			
0			
0	1		
0			
0			
0			
0			
0			
0			
0			
0			
0			
4			
0			
1			
0			
0			
0			
0			
	view data No. 24 0 1 0 0 0 0 0 0 0 0 0 0 0 0 0	View data 24 0 1 0	No. Student Data 24 0 1 0 1 1 0 0 1 0 0 1 0 0 1 0 0 1 0 0 1 0 0 1 0 0 1 0 0 1 0 0 1 0 0 0 0 0 1 0 0 0

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.

Select a column title t	o view data	Bike stand no.	Manna Millian martin farma	The second of
Title	No.	Student	Data	
Bike stand no.	24	Abacrombie, Jimmy	1259	
Title 2	0	Abbott, Kelvin	1243	
Fees '91	1	Alderton, Kelvin	1246	
Title 4	0	Andrew, Michael	1257	
Title 5	0	Armstrong, Jenny	1253	
Title 6	0	Arnold, Tracey	1276	
Title 7	0	Armstrong, Leigh	1265	
Title 8	0	Artz, Cherie	1249	
Title 9	0	Bainbridge, Glenn	1238	
Title 10	0	Barr, Christopher	1256	
Title 11	0	Barrett, Monique	1235	
Title 12	0	Barrett, Nicholas	1276	
Fathers Work	0	Barrie, Noel	1288	
Mothers work	0	Bassett, Leighanne	1277	
Title 14	0	Bassett, Dianna	1275	
Title 16	0	Batchelar, Scott	1273	
Title 15	4	Batt, Suzanne	1271	
Title 18	0	Bayne, Luke	1272	
Other siblings	1	Beets, Andrew	1279	
Title 20	0	Bennet, Shane	1245	
Title 21	0	Bentley, Andrew	1246	
Title 22	0	Bignell, Gregory	1247	
Title 23	0	Bird, Jennifer	1248	

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.

🖻 Media Form		
Pick an existing image		
Browse Disk for Picture		
Capture new image —		
Capture <u>P</u> icture Select Source		
Image Clipboard		
Copy Paste		
Image Tools	<u> </u>]	
<u>Effects</u> <u>U</u> ndo		
Zoom 100%		
Crop & <u>S</u> ave the Picture		

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....

Open A File				? 🛛
Look in: 🗀 media		- t t	* 📰 -	
j4.jpg	j5.jpg	j6, jpg		
File <u>n</u> ame:			<u>O</u> pen	Enable Preview
Files of type: All File	S	-	Cancel	
✓ Load Rotated ✓ Load Compressed		Page No.:	<u>F</u> ile Info	

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.

🖻 Media Form	
Pick an existing image	
Browse Disk for Picture	
Capture new image	
Capture <u>P</u> icture	
Select Source	
-Image Clipboard	
Copy Paste	and an and the second s
Image Tools Effects Undo	A P

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.

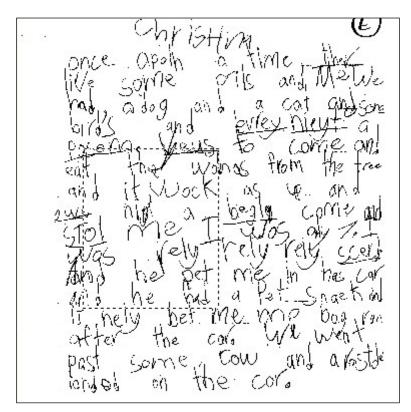


Figure 139: A handwriting sample

10.13 Notes

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



All Documents	Default notes for I of Form 10JO
sonal details.dmt egivers.dmt dical.dmt isty details.dmt isty details.dmt to album 1-6.dmt orical a.dmt indance details.dmt etable.dmt C Personal details.dmt amables 1.dmt sonal details 2.dmt mni details 2.dmt sonal details 2.dmt sonal details 2.dmt sonal details 2.dmt aut adtails.dmt sonal details.dmt sonal details.dmt aut notes.dmt	This is where you can record an unlimited amount of notes on a student.
	Figure 140: The 'Notes' document

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

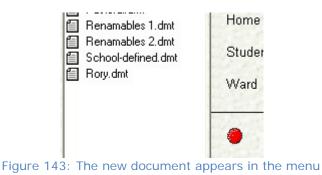
Step 1	Provide a short name for your notes file
	Rory
Step 2	Specify the password you will use to access these notes
Step 3	Re-enter the same password for confirmation
Step 4	Proceed
	Upon creation, a new column will be created to hold your notes, an document will be created under the same name as your notes file a this document will be added to your document selection.

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.



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

🛱 Password e		
Please enter th	e password to view	,
	Cancel	Proceed
Figure 144	: The passwo	ord request

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



Rory for Jennifer Joan Armstrong of Form 11RA

Now I can enter private notes which will be encrypted

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!

w~Jþ-ãÄmLKã⊡³ö⊡K[ú,ä »yëãPDWä?¦ú`Ydi{ŽþbKT ¦ý∼⊡Hø″¤ùxG⊡ä\$¦ý⊡⊡Oâ	Ö-±ðmPKï?â,MPQë'éåq/	
	Password entry Please enter the password to vie	
	Cancel	Proceed

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 det	ails.dmt A	ABACROMBIE, JIMA	٨Y				
Student : JAM		ABACROMBIE	Year:9 Form	n : 9HG	Group :	long	
	Last know	wn address details	Married n	iame			
Address	16 CARGILL	. STREET	Qualificat	ions	B.Sc.		
Details	LEVIN	Place of work Hort. Rese			earch		
confirmed Yes			Partner's	name	Jenny		
and the second of the	-		Feeld		Reunion	details	
Home phone	06 357 7766	ì	Regis	tration	date	09/06/2004	
Personal	021 123 456	37	Regis	tration	number	213	
phone Email	jimjam@hot	mail.com	Partn	Partner attending Yes			
Comment			Reunion notes	107700/2004 Rariu to ask ii partner could			
N.B. You may add your own new fields to this document				alleno	reamon		

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.

w Student		
Basic details	Default data	Default documents
Essential details Family name	for Middle Earth School 👻	Once the family name has been entered, other students with the same family name will be listed below.
First names Preferred name		If you wish to duplicate selected details then select a name from the list.
Date of birth		
Gender	Female	
Ethnicity Help	~	
Status	~	
Optional details	for 💿 2008 🔵 2009	
Year	Year 8	
Form	·	
Tutor	~	Selected sibling :
Enrolment number	28/160	
National student no.		Select an Unlisted Student
	Get / Check NSN	

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 deta	ails for Greymouth High Sc	h 🚽 🔹 Once the family name has been entered,
Family name	Abbott	other students with the same family name will be listed below.
First names	200	If you wish to duplicate selected details
Preferred name		then select a name from the list.
Date of Birth		ABBOTT, COLIN GEOFFREY Date of birth : 19/09/1991
Gender	Female	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.

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, CO	LIN

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.

Optional detai	Is for 200	04 💽 2	2005 🔿	
Year				•
Form		-	2	
Group				•
Enrolment number	02/035			
National Student Index				

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.

pecification of details dded to the file e.g. g	which are common to every new student ender, ethnicity	(Student Manager only) Format (e.g. 01/000)	90/000
Select those columns for and specify those entrie	or which you wish to specify default entries, ss in the table below.	Increment template (e.gXXX) Automatically increment?	Yes
Column	Detail		
Gender	Female		
Language	English		
This Year	1		
		V	

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.)

1 2 3 4 5 Colu	mas 1
Student details	
PAT	
TOSCA	
Curriculum Framework	
Staff Columns	
OEM Assessment	-
Record of Achievement	
Careers	
Absence Summary Details	
NZQA Standards	~

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.

Column	Detail	^
Gender	Female	
Language	English	
This Year	1	
MoE ethnicities 1		-
	Italian Middle Eastern Polish Niue NZ European/Pakeha Australian German South Slav New Zealand Maori Cook Island Maori Other Pacific Island Groups Khymer/Kampuchean/Cambodian Other South East Asian Korean	<

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.

Use this screen to select or remove t documents which you wish to have a during the entry of a new student	a second for a second	Selected documents in will appear.	the order in which they
Select from this list of available docur	ments	Use the arrow keys to a particular selected docu	
Attendance details.dmt Caregivers.dmt Emergency contact.dmt Enrolment details.dmt Financial details.dmt Leaving details.dmt Mailing details.dmt Medical.dmt Metical.dmt Diptions.dmt Pastoral.dmt Personal details 2.dmt Personal details.dmt Renamables 1.dmt Renamables 2.dmt		Personal details.dmt Caregivers.dmt Medical.dmt Ministry details.dmt	
Add selected Remove	selected	Move UP	Move DOWN

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.

 Create Ne Documer 		Create a Document		
A4 Portrait			If you are currently accessing a dossier then	2
11500	Width		you may import existing documents and/or graphs	N
16750	Height		via the utility which will appear in this spot.	
C Import a	component pack from	a Templates disk	State Darge Darge	

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.

•	Create New Blank Document	-
A4	Portrait	•
Cus	stom	
A4	Portrait	
A4	Landscape	
A5		
Scr	reen size (menu hidden)	
Scr	reen size (menu visible)	
Col	umn list (Grid mode only)	

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'.



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!

1/1	Data assistant	Option	ns	Exit Doc
1				
		assistant	2/1 assistant	assistant potions assistant

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.

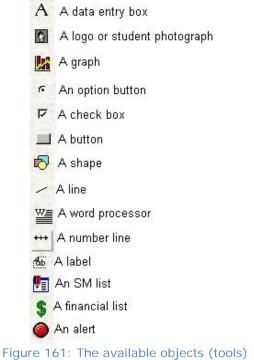


Figure for. The available objects (tools)

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.

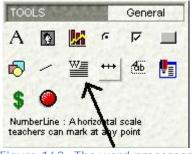
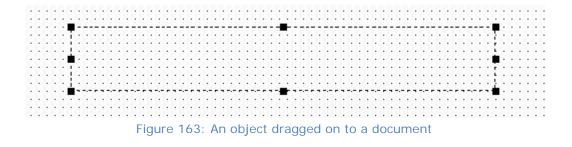


Figure 162: The word processor

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.

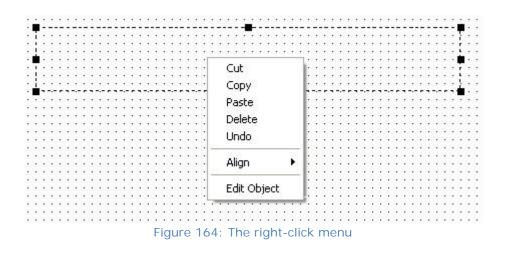


This is the size and shape of our word processor tool. This area will NOT be connected directly to a data column, but will display whatever we type in to it. Frequent uses for this tool are ; your school name, complex labels, or data from the student which is NOT editable via this document.



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.



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

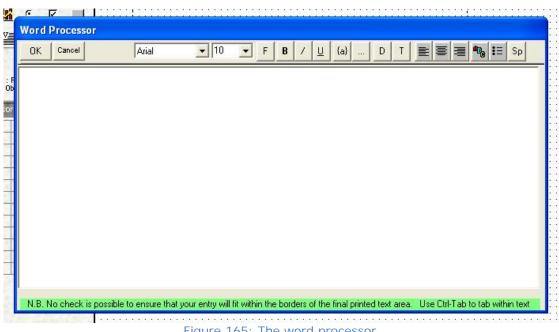


Figure 165: The word processor

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?

ОК	Cancel	Arial
UK		Tena

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...

Word	Processor			
OK	Cancel	Arial Greek	▼ 16	▼ F B
Kai	rakau C	ollege		
		5		
	Figure	e 167: The chang	ge 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.

	c	
vish to set your de r font size to 16 ?	rault font name to	o Arial Greel
Yes	No	
10 10 10 10 10 10 10 10 10 10 10 10 10 1		

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)

RTF code selection						
Caregivers) CF Specials) Columns) St	Financials Count pecials	Activities Grade specials Genders	Pastoral sp Linked comme Names		C SM Specials	
1 2 3 4 5 Coll Student details PAT TOSCA Curriculum Framework Curriculum Framework Staff Columns 0EM Assessment Record of Achievement Careers Absence Summary Details	Dis Dis Dis N.E pre	play column contents play column title (excluding rkbook name) play column title (including rkbook name) play column LONG title terred name by typing Ctrl-N word processor.		Extracts from markbook columns : round to nearest whole number?	F	
				Add	d columns Exit	

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.

Student details	~
PAT	
TOSCA	
Curriculum Framework	
Staff Columns	
OEM Assessment	
Record of Achievement	
Careers	
Absence Summary Details	~

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 4th column of data for this student in the cm database.

	Word Processor						
- [OK	Cancel					
	{ <mark>cm</mark>	.col(4	4)}	-			
Figu	re 172	: The in:	serted	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

Caregivers	Financials	Activities	Pastoral speci	ials
CF Specials	Count	Grade specials	Linked comments	s Column titles SM Specials
Columns	Specials	Genders	Names	1 ⁶
School MUSAC De	emonstration 29/11/2003	Current a	ige (yy.mm.dd)	Time since started schooling (yy.mm)
Date 1	Date 3	Current a	ige (yy.mm)	Time since enrolled here (yy.mm)
Date 2	Date 4	Jan 1st a	ige (yy.mm.dd)	Time at this school (yy.mm)
User name 1	MUSAC MUSAC	Jan 1st a	ige (yy.mm)	Time since leaving school (yy.mm)
User name 2	同分子的分子			Time in New Zealand (yy.mm)
Form teacher	Mr F Teacher			Time at this school (yy years mm months)
Group teacher	Mr F Teacher	Hidden number Hidde	en number	Time in NZ (yy years mm months)
Current date dd Mon	Year Current year	Horizontal title Form	21.00	
Current date dd/mm/	yyyy Next year	Vertical title Group		

Figure 173: The 'Specials' tab

This provides access to the fields shown above.

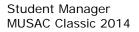
The SM Specials tab provides access to certain fields which are Student Manager specific.

R R	TF code selection					
	Columns Caregivers	Specials Financials Count	Genders Activities Grade specials	Names Pastoral Specials Linked comments	Attendance	Generic Caregiver
	Absence dates Term 1 Week 1 Date e.g. 05/11 Open days e.g. XXX Both e.g. 05/11 XX Student's data e.g. > Proceed	X7	details	Medical details Doctor name Doctor - contact details Doctor - notes Dental name Dental - details Dental - notes Has medical data		ails ation details ear ption set name ption set number

Figure 174: The 'SM Specials' tab

RTF code selection			
CF Specials	Count	Grade specials	Linked comments Column titles SM Spe
Columns	Specials	Genders	Names '
Caregivers	Financials	Activities	Pastoral Specials Attendance Generic Caregive
Step 1 Select caregiver	Home phone	Occupation	Addresses User Fields
Caregiver 2	Work phone	Workplace	Postal zip code Physical post code
Step 2 Select field	Fax number	School assistance 1	Postal address 1 Physical address 1 Preferred address 1
Family name	Cell phone	School assistance 2	Postal address 2 Physical address 2 Preferred address 2
First names	Other phone	School assistance 3	Postal address 3 Physical address 3 Preferred address 3
Title	Email address	School assistance 4	Postal address 4 Physical address 4 Preferred address 4
Relationship	Logon	Notes	Postal address 5 Physical address 5 Preferred address 5
Emergency contact	Password	Title Initial Family name	
Living with	Invoices	First names Family name	
Legal guardian	Reports		
Access rights	Voting rights		

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		
	s apply to a particular pa pastoral document printir			ls apply to all of a dent's transactions year		
Transaction date	Com	ment	Total pastoral	points		
Teacher name	Actio	n	Total offence	points		
Detail 1	Actio	on comment	Total merit po	ints		
Points 1	Othe	ıt	Number of off	ences		
Detail 2	Time	taken	Number of me	rits		
Points 2	12.94		Number of su	pports		
Detail 3	1925					
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.

TOOLS	General	1 : : :	:::	:::	::	::	::	::	:	:	: :	: :	:	: :	:	: :	
		1 : : :	:::	:::	::	::	::	::	: :	:	::	: :	:	: :	:	: :	
AQ	🔲 🤉 n 📶	1 : : :	:::	:::	::	::	::	::	:	:	: :	: :	:	: :	:	: :	
-	W= AT	1.1											848				2
	Mii 👐 🌆	· In	voic	e	::	::	::	::	•		• •	: :	•	. :	:		
-10				• • •					•	• •	• •		•	• •	•	• •	
5 0			:::	11	::	::	11	::	:	1	: :	: :	1	: :	:	: :	
Financial : Use	this to place a financial		• • •	• • •	• •	• •	• •	• •	•		• •	• •		• •		• •	
object on your	document				11	11	11					11			1		
	State State State	1. 1.							•	• •							
Financial Pro	nartias 💣	1.2	• • •	• • •	• •	• •	• •	• •	•		• •	• •		• •		• •	
1 Inditicial FTO	per lies						11				1	: :		1	1		2
Тор	960	l · L ·		• • •					•	• •	• •		•		•	• •	ł
And and a second s		1					11				• •	• •		• •	•	• •	1
Left	240														1		
Width	3960	$\mathbf{e} \mathbf{e}$	• • •	• • •	• •	• •	• •	• •	•	• •	• •	• •	•	• •	•	• •	
Height	3600		:::		::	::	11	::	: :		: :	: :	1	: :	1	: :	
and the second sec	5000	1 A A	• • •	• •	• •	• •	• •	• •	•	• •	• •	• •	•	• •	•	• •	
Туре	The second se		:::	11	11	: :	11	: :			· · ·	: :		11	1		
Per_page															•		
OnPage			:::	::	::	::	::	:::	•		: :	: :	1	: :	1		1
		1. 1															
Format_details	s 🗸 🗸	1. 1. 1.	• • •	• • •	• •	• •	• •	• •	• •	•	• •	• •		• •	•	• •	ł

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.

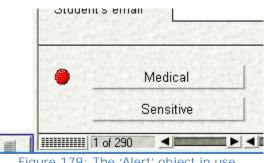


Figure 179: The 'Alert' object in use

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'

	<u>D</u> ata assistant	涩	<u> </u>
Figure 18	30: The Da	ta Assista	ant button

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

	Student details PAT TOSCA Curriculum Framework Staff Columns DEM Assessment Record of Achievement Careers Absence Summary Details		
Column keyword search Remove Column	Search Documents for colu	 Barran Calum	

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'.

Fees Paid Full Time Equivalent Special Ed. ORRS Special Ed. Hours Pacific Medium - Language Pacific Medium - Level Maori Lang. Learning Index Early Childhood Education Foreign Language1 ESOL	Fees Paid Full Time Equivalent Maori Lang. Learning Index Early Childhood Education
Search Documents for columns	
Column keyword search	Remove Column

Figure 182: Selecting columns in the Data Assistant

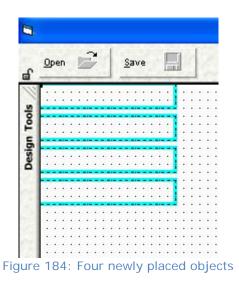
Once you have made your selection, click next and you will arrive at the ultimate stage. This is where you select how you wish the fields to be displayed on your document. The most useful one, used virtually exclusively in student Manager, is the fourth one down, as shown below.



efault Data Entry F	ields
efault Data Entry F	ields with verbose names
create Labels for the	ese columns only
efault Data Entry F	ields, captions to the left
ption Selection Ta	ble, 3 values
ption Selection Ta	ble, 4 values
ption Selection Ta	ble, 5 values
ption Selection Ta	ble, 6 values
ick box Selection T	able, 3 values
ick box Selection 1	able, 4 values
ick box Selection T	able, 5 values
ick box Selection T	able, 6 values
lumberline Selection	n Table
ata Entry Fields wit	h Custom Fonts & Position
abels only with Cus	
ata Entry Fields on	

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.

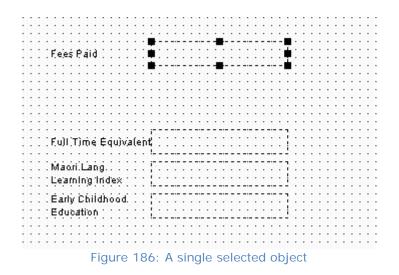


Select them (with the mouse!) and slide them to a more useful place on the document. The turquoise borders indicate that more than one object has been selected. Once you have them in roughly the right position click elsewhere on the document to release the selection. The blue borders will become black.

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

a Open 🕻	Save	1/1 Data 20ptions Exit Doc 2
TOOLS	General	
A CONCEPTION OF THE OWNER	e en en en	
AQ	📃 🤉 o 🔛	
6	Wi +++ 🚳 🛃	
~		
	Constant Constant	· · · · · · · · · · · · · · · · · · ·
\$ 0	market Starmarket	
Financial : Use	e this to place a financial	
object on your	document	
Data Propert	ties A	
Font	T	· · · · · · · · · · · · · · · · · · ·
FontSize	Ť	Fu)l Tìme Equìva(ent
and a state of the	1320	······································
Тор	the second se	Maori Lang.
Left	2280	Learning Index
Width	2040	Early Childhood.
Height	360	Education
Column	165 🗸	
FontBold	V	
FontItalic	V	
Caption	Fees Paid	
OnPage	V	
CaptionPos	-1500	
CaptionWid		
Align	The second se	
Multiline	Ť	
Multipage	Ť	
munpage	<u> </u>	
		Figure 185: The four objects moved

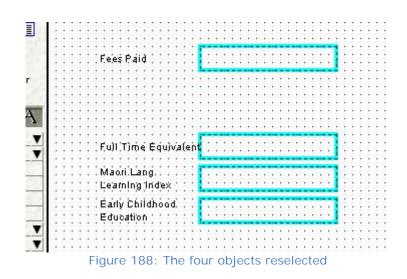
When it was clicked, it gained boundary boxes - to indicate that it had been selected. The properties of the currently selected object are displayed in the lower half of the left hand side of the screen. This is where you can alter the properties. eg. You could change the caption, or the caption position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



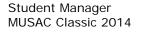
If you elect to change the font by clicking in either of the first two properties then the font dialogue will appear. Please ensure that you make a selection from ALL THREE of the properties - Font, Style and Size.

Font:	Font style:	Size:	
	Regular		OK
법 @Arial Unicode MS 법 @Batang 법 @MS Mincho 법 @PMingLiU 법 @SimSun 법 Abadi MT Condensed 법 Abadi MT Condensed	Regular Italic Bold Bold Italic	8 9 10 11 12 14 16	Cancel
	Sample Script:		
	·		

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



... 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.



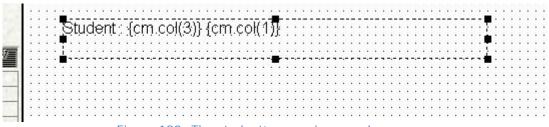


Figure 189: The student's name in a word processor

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.

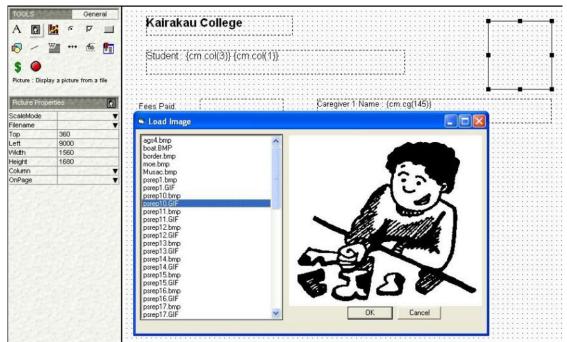


Figure 190: Selection of a picture

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'

TOOLS	General	Kairakau Co	lene
AQ	🗖 🤉 🖬	Column Picker	
R -	🎬 🕶 🊳 打	1 2 3 4 5	Columns] 1
S O	lay a picture from a file verties	Photo Yr0 Photo Yr1 Photo Yr2 Photo Yr3 Photo Yr3 Photo Yr4 F Photo Yr5	
ScaleMode		Photo Yr6	
Filename		Photo Yr7	
Тор	360	Photo Yr9	
Left	9000	Photo Yr10	× 1
Width	1560	1116	
Height	1680		
Column	1		
OnPage			Cancel

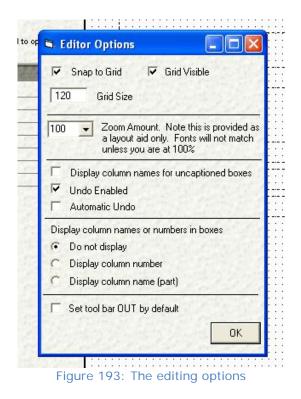
Figure 191: The year-photographs columns

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

AQ	🗖 🤉 🖬	Column Picker	
	Mi 🕂 🎋 🌆	1 2 3 3 4 5 Colum	ns 1)]
Picture : Displ:	ay a picture from a file erties	Postal address 5 Page 1 photo Mail to which Post code Post code (Post) F Pay by autopayment	
ScaleMode	T	:::: Report name	
Filename	T	Report full name	
Тор	360	Bursary Total	
Left	9000	Entrance	✓
Width	1560	· · · · F	
Height	1680	· · · · · · · · · · · · · · · · · · ·	
Column	▼	· · · · N	
OnPage	T		1 1
Contraction of the second s	and a second sec	Add columns Cance	-1

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.



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.

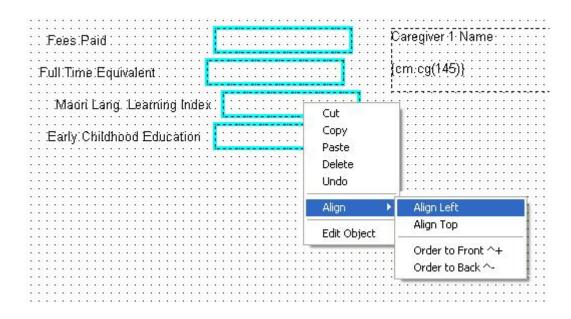
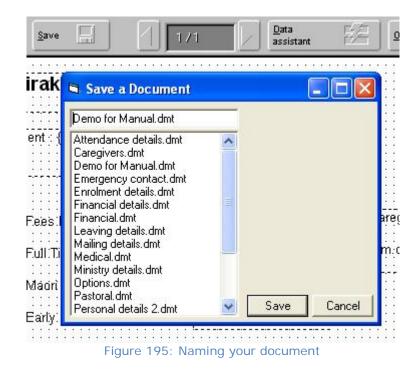
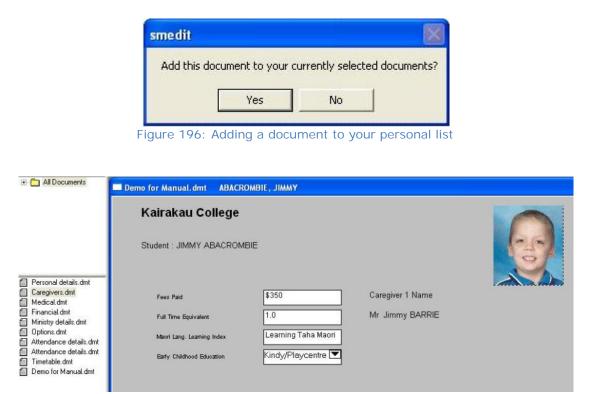


Figure 194: Alignment of several objects

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



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.





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 by 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.

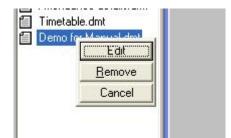


Figure 198: Right-clicking on a document in the menu

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.

Print Document		_
Edit Document		
Close all open documents		
Reapply any document f	ormulae	
Hot key prompt		
Tile Windows		,
1 Personal details.dmt	ABACROMBIE, JIMMY	
✓ 2 Demo for Manual.dmt	ABACROMBIE, JIMMY	

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

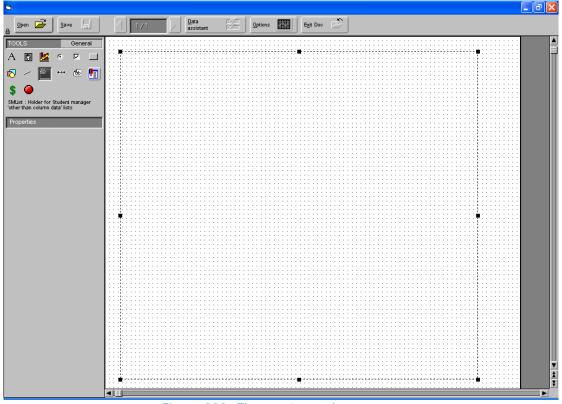
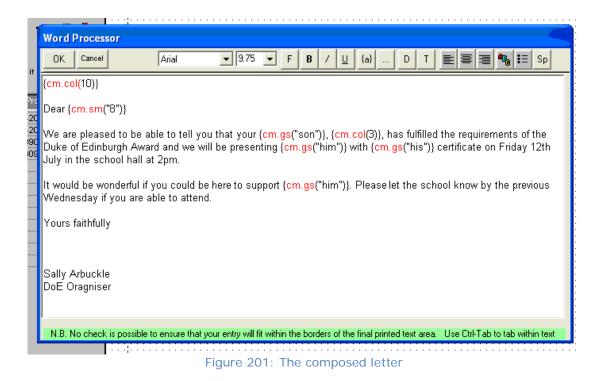


Figure 200: The empty word processor

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.



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

. Kairakau: College Privaté Bagi 5 . Kairakau: {cm.special(25)} {cm.col(4)} ; {cm.col(7.)} W (cm.col(8)) (cm.col(9)} {cm.col(10)} :Dear:{cm.sm("8")} V λ Ve: are pleased to be able to tell you that your (cm.gs("son")), (cm.col(3)), has fulfilled the requirements of the λ V Duke of Edinburgh Award and we will be presenting (cm.gs("him")) with (cm.gs("his")); certificate on Friday 12th July in the school hall at 2pm. ¥ V) would be wonderful if you could be here to support (cm.gs("him")). Please let the school know by the previous Wednesday if you are able to attend. V V Yours faithfully. . Sálly: Arbuckte: DoE Oragniser Figure 202: The letter in the edited document

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

	Letter home.dmt ABACROMBIE, JIMMY
	Kairakau College Private Bag Kairakau
	15 Jun, 2004
_	MR A & MRS D SCHULZ 16 CARGILL STREET LEVIN
t t	Dear Mary and Jim We are pleased to be able to tell you that your son, JIMMY, has fulfilled the requirements of the Duke of Edinburgh
	Award and we will be presenting him with his certificate on Friday 12th July in the school hall at 2pm.
	It would be wonderful if you could be here to support him. Please let the school know by the previous Wednesday if you are able to attend.
	Yours faithfully
	Sally Arbuckle DoE Oragniser
	Figure 202, A male student's letter



And, for a female student :



1	Kairakau College Private Bag Kairakau 15 Jun, 2004 MR C & MRS P ARMSTRONG 26 STRATHMORE AVENUE LEVIN
	Dear Harry and Louise We are pleased to be able to tell you that your daughter, JENNY, has fulfilled the requirements of the Duke of Edinburgh Award and we will be presenting her with her certificate on Friday 12th July in the school hall at 2pm. It would be wonderful if you could be here to support her. Please let the school know by the previous Wednesday if you are able to attend. Yours faithfully
	Sally Arbuckle DoE Oragniser



When finally printed the appearance might be as shown below.

Kairakau College Private Bag Kairakau
15 Jun, 2004
MR C & MRS P ARMSTRONG 26 STRATHMORE AVENUE LEVIN
Dear Harry and Louise
We are pleased to be able to tell you that your daughter, JENNY, has fulfilled the requirements of the Duke of Edinburgh Award and we will be presenting her with her certificate on Friday 12th July in the school hall at 2pm.
It would be wonderful if you could be here to support her. Please let the school know by the previous Wednesday if you are able to attend.
Yours faithfully
Sally Arbuckle DoE Oragniser

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

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.

-	Help			
	Chool Details	Language Alternatives	ENROL Configuration	Personal <u>N</u> otes Files
	Group Maintenance	Data Column Maintenance	Popup List Maintenance	Comment Bank Maintenance
c ()	Years and Classes	Imetable Option Details	Subject Details	Markbook Connections
musac	Staff and Their Dossiers	\$ Billable Items	P <u>a</u> storal Details	Document Management
				Oose

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.



5	Student Manag	er School Details		
		School address	details (Note: Changes are saved	d as they are made)
	School Address Details	School name	Middle Earth School	
ſ		School address	Address 1	
	User Specified Details		Auckland	
ι]		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.xxxxxxxxx.school.nz	
		School email service provider *		
		School number	0187	
		'School email service p school's provider e.g.	rovider' is the digital address of the '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.



🛢 Student Manager S	chool Details			
	User-specified details	(Note: Changes are saved as t	hey are made, except for enrollment,)
School Address Details	Enrolment number details (Stude	ent Manager only)	School category	
	Format (e.g. 01/000)	28/159	Full primary	\bigcirc
User Specified Details	Increment template (e.gxxx)	XXX	Contributing	0
Details	Automatically increment?	Yes 🗸	Intermediate	0
	Current increment portion	159	Restricted composite	0
		Save Enrol	Composite	0
	Wordprocessor defaults		Correspondence school	
	Font name	Arial	Secondary (yrs 7-13)	\circ
	Font size	12 🗸	Secondary (yrs 9-13)	\odot
	Font italic?	No 🗸	Special	0
	Network delay		Report dates	
	operating this package on a large package has had added the facility	rbitrary reports of record-locking when / slow network. To avoid this, the / to delay for a brief period when this er of milli-seconds that you wish this	Dates to appear on repor may relate to future even Parent- Teacher meetings	its eg
	delay to be. (1000 = 1 second) T	rial and error will indicate to you the ir network to function most efficiently.	Date 1	
	2 / /	of perhaps 4 milliseconds is sufficient	Date 2	
	for most situations where a delay i		Date 3	
	Network delay in milliseconds	0	Date 4	
	incent actual in initial control			
	Figure 20	8: The user-specified de	etails	

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.

Student Manager Language Alternatives			
Definition of La	nguage alternatives		
Please specify which lange	iage specific words you will use		
The YES word is	Yes		
The NO word is	No		
The FEMALE word is	Female		
The MALE word is			
THE MALE WORD IS	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.



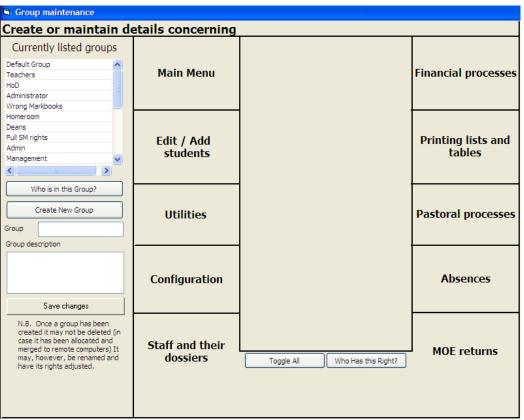


Figure 210: The Group maintenance screen

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		
	Add new students		
	Access the data cube		
Main Menu	View only access to financial details document		
	View only access to students' options documen		
	View only access to pastoral details document		
	View only access to sensitive information docur		
	View only access to caregiver details document		
Edit / Add students	View only access to Ministry details document		
	View only access to medical details document		
	View only access to attendance details docume		
	Full access to financial details document		
	Full access to students' options document		
	Full access to pastoral details document		
Utilities	Full access to sensitive information document		
	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		
	View only access to personal details document		
	Full access to personal details document		
Configuration	Creation of document directories		
Configuration	Temporarily access all documents		
	Document selection via student screen		
	View only family details		
	Able to edit/create documents		
	Access to Classroom Manager columns		
or ((1.1.)			
Staff and their			
Staff and their dossiers	Toggle All Who has this right?		
oran and chem	Toggle All Who has this right?		

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.

de	etails concerning		
	Main Menu	Who can : Full access to financial details document ALL CODE	
	Edit / Add students	DOF DOY DOY EKI ETK y Robert FO2 GEE GRC HAF	III
	Utilities	HO1 na P HUF INK JEH n KER ryn KUE LAS	
	Configuration	LUV McK McL t MIC MIR MUL PAF , PUK	
	Staff and their	RHI ROL pia SON I 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'.

	U	olumns Right-click f	or options
Tat. 1 tudent Manager AT DSCA Uniculum Framework taff Columns EM Assessment ecord of Achievement chool Reporting areers bsence Summary Details ZDA Standards umeracy sTHe TAR Add category			
evel 1 :			
Vel 1 : Update Delete			

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.

Categ	jories
Cat. 1 Student M PAT TOSCA Curriculum Staff Colur OEM Asse Record of School Re Careers Absence S NZQA Sta Numeracy AsTTle STAR	Mathematics Study Skills : Reference Study Skills : Maps Study Skills : Reading Mathematics II Reading Vocabulary II Parading Cocabulary II
	Add category

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.

Categories			Columns	Right-click for options
Cat. 1 Student M Cat. 2 Cat. 2 Cat. 3 PAT Listening (Cat. 3 Par Listening (Year 4 Year 5 Staff Colur Mathemati Staff Colur Mathemati Staff Colur Study Skill Year 7 School Re Careers Mathemati Absence S Reading V Study Skill Year 9 Mathemati Absence S Reading V NZQA Sta Numeracy AsTTle STAR			Date Sat Maths Yr8 Age at Test Maths Yr Raw Score Maths Yr Scaled Score Maths Class Percentile Math Age Percentile Maths Class Stanine Maths Age Stanine Maths Y Diff ClsPtl Yr8-7 Math Diff AgePtl Yr8-7 Math Diff ClsStn Yr8-7 Math Diff AgeStn Yr8-7 Math	3 Yr8 is Yr8 Yr8 r8 s hs ns
Level 3 :	ory Add sub category		Edit column details	Add new column
Eigu	ro 21E, Cotogory 2	The years	and the column	20

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.

Columns Right-click for o	ptions
Date Sat Maths Yr8 Age at Test Maths Yr8 Raw Score Maths Yr8 Scaled Score Maths Yr8 Class Percentile Maths Yr8 Age Percentile Maths Yr8 Class Stanine Maths Yr8 Age Stanine Maths Yr8 Diff ClsPtI Yr8-7 Maths Diff AgePtI Yr8-7 Maths Diff AgeStn Yr8-7 Maths Diff AgeStn Yr8-7 Maths	Copy selected columns - ^C Paste selected columns - ^P Paste Special - ^S Properties of selected column Delete selected columns
Edit column details Add new co	lumn
Elevera 21(0-	and the second between a

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.

Categories	
Cat. 1	_
Student Manager PAT TOSCA Curriculum Framework Staff Columns OEM Assessment Record of Achievement School Reporting Careers Absence Summary Details NZQA Standards Numeracy AsTTIe STAR	
Add category	
Level 1 :	_
New entry here	
Update Delete	

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'.

Categories
Cat. 1
NZQA Standards 🛛 🔥 🔨
Numeracy
AsTTle STAB
Essential Skills Assessments
Internet Connection details
Activities
ESOL
Fees Paid Report Comments
10EN
Pretos
Sports
Add category Add sub category
Level 1 :
Sports
Update Delete

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.

Categori	25	
Cat. 1 NZQA Sta Numeracy AsTTle STAR Essential \$ Internet C Activities ESOL Fees Paid Report Co 10EN Pretos Sports		
	Add category	
Level 2 :		
Update	Delete	

Figure 219: The Category 2 entry

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

Categories
Cat. 1 NZQA Sta Numeracy AsTTle STAR Essential S Internet C Activities ESOL Fees Paid Report Co 10EN Pretos Sports
Add category Add sub category
New entry here
Update Delete

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'.

Copying sets of columns
Remember that you can cut and paste existing columns and/or comments between different categories.
To do this :
 Select the columns/comments which you wish to copy by holding down the Control key while clicking on selected columns/comments. Press Ctrl-C to 'Copy' them.
 Choose the category selection into which you wish to copy them then click in the column/comment display.
 Press Ctrl-V to 'Paste' them into the new area. Any already found in the new area will not be copied.
Do not show this message again.

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.

musac

Student Manager MUSAC Classic 2014

Column Name	Points scored	
Column Type	×	
Column Description Objective: short description	Numbers Simple Text Date Rich Text Format Popup List <11 characters Curriculum Framework Currency Electronic Markbook	
Key words		
Category 1 :		
Category 2 : Rugb	у	

Figure 222: The creation of a column

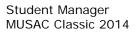
There are several types of columns. This allows for increased efficiency in the storage of data in the database. Some are very simple, and others are quite complex:

- 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.

Maintenance of Spreadsheet Columns				
Column Name Column Type	Points scored Numbers Column Rules			
Column Description	The number of points scored in the season.			
Objective: short description				
Key words	Points scored			
Category 1 : Category 2 : Rugb	у	Save new Cancel		

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.

Column rules Enter any valid entries (paying atter case) to which entries in this column entry per line, pressing <enter> at</enter>	are restricted. Make one
a b c d e	
Remove exiting rules	Proceed

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.

Categories	Columns	Right-click for options
Cat. 1 NZQA Sta Rugby AsTTle STAR Essential S Internet C Activities ESOL Fees Paid Report Co 10EN Pretos Sports	Points scored	
Add category Add sub category Level 2 :	Edit column details	Add new column
Rugby		
Update Delete		





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 :	Sets found for 2008
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.	Set 1 (Linked to 2008) Set 2 (Linked to Copy of 2008) Set 3 (Linked to exam 2008) Set : core
Total no. of sets : 5 Change to : 5 OK Year : 2008 •	
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.	
(Re)Create columns for core subjects Create option columns fo	vr 2008
Column Maintenance	Creation of Option Columns Print Column Details
Column Maintenance	
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 Maintenace

Category	Columns	~				
Student Manager	572		Include MUSAC column numbers			
PAT	719		Include category numbers			
TOSCA	54			_		
Curriculum Framework	2024		Include column types			
Staff Columns	340		Begin each Category 1 group			
OEM Assessment	10		on a new page			
Record of Achievement	1271					
School Reporting	0		Print column title	\bigcirc	Landscape	0
Careers	46		Print column short description	0	Portrait	0
Absence Summary Details	1802		(when available)	0	Portrait	0
NZQA Standards	56	-	Print column long description	0		
Numeracy	96		(when available)	~		
AsTTle	4536					
STAR	195					
Essential Skills Assessments	72					
Internet Connection details	3	~				
Total columns specified : 12090)					Print

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.



ClassRoom Manager / Student Ma	nager
Popup List Maintenance	N.B. Some popups (e.g. Ethnicities are set by the Ministry of Education and are not editable. These popups are not listed below.
Available popup lists Awa Bus Culture / Study DBase Update Dean Doctor/Dentist Financial explanations Hapu House House House Medical Problems NZQA NZQA address choice Occupation Old ethnicities Other Act. 2 Other Activ. & Respo Should the list of possibilities for this point Delete this popup list	pup be sorted?

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!

Available popup lists	Sports/Cultural
Probability of Returning	Ngarimu 🔨
Reading Level	Rutherford
Relationship	Hillary
Report Activities Report Activities 06	Wilding
Report Activities 2	
Report Activities 2007	
Report Activities 2007/2	
School Assistance	
Special Needs Sport Activities 2007	
Sport Interest	Insert
Sports Activities 06	
Sports Acts 2 2005	
Sports Acts 2005	
Sports Participa, 2	
Sports Participation Sports Reports 2	
Sports/Cultural Houses	
Should the list of possibilities for t	his popup be sorted?
Illustration 21 :	A popup and its contents

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

	S	por	ts/C	ult	ural			
Ngar	rimu	J.					^	
Hillar	y						3	
Wildi	ing							
Ruth	nerf	ord						T
								Insert

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.

	Available popup lists
	School Assistance 💦
	Special Needs 👘
	Sport Activities 2007
	Sport Interest
	Sports Activities 06
	Sports Acts 2 2005
	Sports Acts 2005
	Sports Participa, 2
	Sports Participation Sports Reports 2
	Sports/Cultural Houses
	Subject
	Subject Code
	Teacher code
	Teacher/Dean
	Travel mode
	Tuesday P3
	Waka
l	Whereabouts Save Cancel
	Should the list of possibilities for this popup be sorted?
	Create a new popup list

Illustration 23 : Creating a new popup

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

Popup List Maintenanc	e N.B. Some popups (e.g. Eth and are not editable. Thes
Available popup lists	Position
Financial explanations Hapu Hostel House Maunga Medical Problems NZQA NZQA address choice Occupation Old ethnicities Other Act. 2 Other Act. 2 Other Act. 2005 Overseas Stdnt PAT ListComp EAB PAT RdgComp EAB PAT RdgComp EAB PAT RdgVoc EAB Postion	Centre First Five Eight Fulback Halfback Left Wing Right Wing

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.

ClassRoom Manager / Student Manager comment maintenance					
Comment bank maintenance					
Cat. 1 Cat. 2 Construct Numeracy PDSITIVE Writing	Link Comment (right-click = sort)				
Add category Add sub cat. Level 2 : Junior Update Delete	Add a new comment				

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.

S Word Processor	
OK Cancel Arial 💙 10 💙 F	B / U (a) D T ≣ ≣ ≣ 🗞 ☷ Sp
N.B. No check is possible to ensure that your entry will fit within th	e borders of the final printed text area. Use Ctrl-Tab to tab within text

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.

Word Processor		
OK Cancel Arial	✓ 10	F B / U (a) D T = = = 🐴 🏭 📰 Sp
{cm.col(3)} wrties with great enthus	iasm, howe	ever

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.





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.

RTF code selection						
Caregivers CF Specials Columns	Financia Count Specials	als Activities Grade specials Genders	Pastoral s Linked comm Names		e SM Specials Standards	
1 2 3 4 5 Student Manager PAT TOSCA Curriculum Framework Staff Columns OEM Assessment Record of Achievement School Reporting Careers Absence Summarii Deta		Display column contents Display column title (excluding markbook name) Display column title (including markbook name) Display column Long title N.B. You may quickly add the s preferred name by typing Ctrl- in the word processor.	O O student's	Extracts from markbook columns : round to nearest whole number?		
				Add	I Columns Close	

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)	
Воу	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....

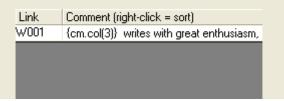


Illustration 33 : The new comment is listed

... 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 concernir

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 CMAdministrator.



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.

Act	ive years	
Title	Year	Display Student Numbers
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		
	Save Changes	

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	Year	Hide student numbers			
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			
	Save Changes				

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 Form Display Student Numb				lumbers			
Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	
	9PA	1030	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	10W/
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'....

smconfiguration	×
If you wish to MOVE a Form to a new column, then enter it in to the new column BEFORE deleting i This will ensure that students currently in 10P are not removed during the process. Are you sure that you wish to delete : 10P	t from this column.
<u>Y</u> es <u>N</u> o	

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.

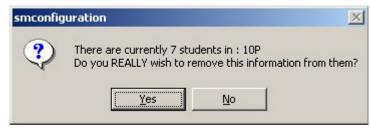


Illustration 8 : Confirmation of deletion

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.

Vertic	Vertical groups									
Title	Group									
10EL		31								
1030		32								
10MA		28								
10WA		32								
9FA		31								
9HA		31								
90S		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 :

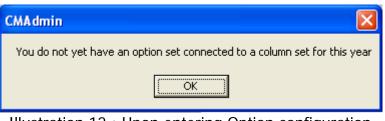


Illustration 12 : Upon entering Option configuration

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.

Creation of option/subject columns	
Options are stored in columns which appear under :	Sets found for 2008
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.	Set 1 (Linked to 2008) Set 2 (Linked to Copy of 2008) Set 3 (Linked to exam 2008) Set : core
Total no. of sets : 5 Change to : 5 OK Year : 2008 Vear category : 2008 FOUND	
NOT ALL sets of option columns HAVE YET BEEN CREATED for 2008 Core set of columns for 2008 have been created.	
(Re)Create columns for core subjects Create option columns for	2008

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.

Set 1 (Linked to 2008) Set 2 (Linked to Copy of 2008) Set 3 (Linked to exam 2008) Set : core	Sets found for 2008	
	Set 2 (Linked to Copy of 2008) Set 3 (Linked to exam 2008)	

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.

	2008 💉 20	08				~		Year 8	8	Year 9					
	You may change the r	name of	this set by editin	g the title	Confr	m Change.		Sort lines or	n char	ige 🗌					
	This is the CURRENT s									cted to Option (Colum	ins set: 1			This set is 'A
djust Options Sets	Core Optic subjects														
	X inects		V T	ich W X Inect		X Inactive	Tdh	X inactive	Tch	Z X inactive		A X inactive	8 X inactive	C X inactive	× inactri
Delete a Set															
Column Creation															
Connecting Columns to Sets															
annecting Core to Students															
Connecting Subjects to Markbooks															
	<u>«</u>						1								2
	Print this Year		Print Set		ake Def	ault Set	Crea	te set for 2008		Create set fo	y 206	09			

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

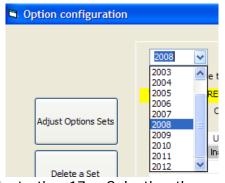


Illustration 17 : Selecting the year

2. The set of options from that year

2004 options - fi	st half year 💽
et 2004 options - fi 2004 options - s	st half year
URRENT set	This set of options is not yet
Option subjects	The format for options is a 6-character subject co

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

 $3. \ \ \, \text{The students' year level which you wish to view.}$

	Year 9	•	Year 10
Sort	Year 9 Year 10		1
connected to a	Year 11 Year 12	n	ns
de followed by (Year 13		

Illustration 19: Selecting the year level

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

Print this year	Print this entire set	Make this the default set	Create a new set for 2004	Create a new set for 2005
	101			

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.

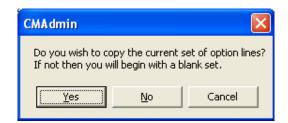


Illustration 21 : Copying a set for the current year

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.

•	New set name - p	please edit!	_
shange t	he name of this se	et by editing the title above	Confirm change.
NOT th	e current set	This se	t of options is not yet conr
	lustration 2	2: The new set ne	eeds a name

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

_					_
	2004 spare demo	i set		-	
je	the name of this se	et by ed	liting the title above	(Contirm change.)	
" tł	e current set		This s	et of options is not ye	et c
	Illustration	23 :	The new set	t 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.

t for options is a 6-character subject code followed by a teacher code.														
	С	Tch		D	Tch		E	Tch		F	Tch		G	Tch
\checkmark	Active		X	Inactive		Х	Inactive		X	Inactive		\checkmark	Active	
9TE		ST												
		C Active 9TE	C Tch Active 9TE ST	C Tch Active X 9TE ST	C Tch D Active X Inactive 9TE ST	C Tch D Tch Active X Inactive 9TE ST	C Tch D Tch Active X Inactive X 9TE ST	C Tch D Tch E Active X Inactive X Inactive 9TE ST	C Tch D Tch E Tch ✓ Active X Inactive Inactive 9TE ST Inactive Inactive	C Tch D Tch E Tch Active X Inactive X Inactive X 9TE ST	C Tch D Tch E Tch F Active X Inactive X Inactive Inactive 9TE ST	C Tch D Tch E Tch F Tch ✓ Active X Inactive X Inactive X Inactive 9TE ST Image: ST Ima	C Tch D Tch E Tch F Tch ✓ Active X Inactive X Inactive ✓ Inactive ✓ 9TE ST Image: ST	C Tch D Tch E Tch F Tch G Active X Inactive X Inactive X Inactive Active

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).

	A	Tch		В	Tch		С	Tch		D	Tch		E	Tch		F	Tch
✓.	Active		\checkmark	Active													
11M/	Δ,	NU	11M	U	0A	11H8	Ξ	MC	11M	м	BT	11A	Г	KA	11CF)	ΒT
11E0	à	PK	11M	S	MA	11E0	0	WS	11M	D	PA	11H	0	JS	11A1	•	KA
11W	W	PA	11CI	L	MC	11A9	6	MK	11M	D	ΗP	11S	6	ED	11M/	Δ.	RA
11E0	à	BT	11TI	D	DV	11G8	Ξ	ST	11M	D	MO	11T'	ŕ –	PS	11LE		PT
11GE	Ξ	PT	11E	G	HG	11LN	4	MO	11M	D	DN	11E	G	AK	11HE		JA
11HI		MO	11E	G	GI	11E0	à	SK	11M	D	DV	11E	G	ST	11GE		TH
11M	W	DV	11S	S	SM	1159	6	TH	11M	D	PK	11Lł	4	TM	11A0	2	HG
1150	2	DN	11M	A	CL	11M/	Δ,	NU	11M	D	RA	11M	A	SM	11S0	2	DN
11M/	Δ,	RA	11SI	C	MK	11S0	2	ΒY	11M	D	PT	11SI	2	ΤY	11E0	ì	FO
11T\	7	WΚ	11A	С	AS	11T\	N	WT	11E0	à	AK	11G	E	GP	11E9	ì	AS
11M/	Δ,	BT	11T)	W	WT	11M	D	PN									

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

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.

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.

This is the CURRENT set	This set of options is not yet connected to a set of option columns	This set is currently 'INACTIVE'
-------------------------	---	----------------------------------

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.

Warning - a conflict exists between core and option classes!
You may not have subjects which are in both the core and the option structure. Core subjects are deemed to be compulsory-taken by ALL students at their level.
If a subject is in both the core and an option line then the students involved will be double-counted in the Ministry Returns. The Ministry rules prevent returns from being completed when this is the case.
Identified subjects : 9MU
Please take steps to correct this situation before proceeding with the various NZQA procedures
Proceed

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.

	staachts at their level.	
is	CMA dmin 🛛 🕅	en
ıbl		ule
ret	Do you wish to remove 9MU from the core subjects	e.
SL	Yes No	
as	כ ועגב אבףא וט כטוובכו וווא אושעווטוו שבו	or
	ation 29 : The offer to remove the class	

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 During a year you may operate more than one set of options. Each set Year 2004	•
Option column set is connected to Status Set 1 is connected to is connected to Set 2 is connected to is connected to	2004 options - first half year 2004 options - second half year
To specify a connection, select the column set on the left hand displ then select the option set from the right hand display.	ay, Help! Explain all this!
N.B. Only those sets which have been connected to co students option-attachment screen. To create a new co 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	2004 options - first half year 2004 options - second half year
Set 1	•		2004 options - second half year*
Set 2			
	l Click here		Then here
	Click here		

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 2004	•	
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.

Option column set.	is cor	nnected to	Status	2004 options - second half year
Set 1	2004 o	2004 options - first half year		
Set 2	2004 o	2004 options - second half year		
	CMAdmi	n		
	2	You should NOT remove in the selected set (and Clearly this would NOT Are you SURE that you	l attached to be a good id	ea
		C	Yes	<u>N</u> o

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 :

Make this the default set

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

This is the CURRENT set	The '2004 options - first half year' set of options is connected to Option Columns set : 1	This set is currently '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.

This process is not to underbe taken lightly! Please ensure that you know what you are doing. If in any doubt at all then make a backup before proceeding. You may NOT delete the CURRENTLY ACTIVE set of option lines. If you wish to do so then you must first make a different set of lines the currently active ones.

	<u> </u>
This year's options 2004 options - second half year 2004 spare demo set	
2004 options - second half year	
2004 spare demo set	
	Delete selected se

Illustration 36 : Deleting a set of options

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

Type 'Yes' to confirm						
No						
Proceed	Cancel					

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.



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 :	2	OK
Year :		2004	-

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.

Categories	Columns Right-click for options
Cat. 1 Cat. 2 Student d Attendanc PAT TOSCA Staff Colu Subject h 1995 Careers Absence S NZQA Sta Comment Reports Activities Cat. 2 Cat. 3 Cat. 3 Cat. 3 Cat. 3 Cat. 3 Cat. 2 Cat. 3 Cat. 3 Cat. 3 Cat. 3 Cat. 2 Cat. 3 Cat. 3 Cat. 2 Cat. 3 Cat. 4 Cat.	Option 2003/1A Option 2003/1B Option 2003/1C Option 2003/1C Option 2003/1C Option 2003/1C Option 2003/1F Option 2003/1K Option 2003/1X Option 2003/1X Option 2003/1X Option 2003/12 Option 2003/12 Option 2003/12 Option 2003/12 Option 2003/12 Option 2003/10 Option 2003/1C Option 2003/1C
Add category A	d sub category Edit column de Option 2003/W core Option 2003/X core Option 2003/Y core

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.



1 , 9	Student Manager subject specifications		
	Subjects offered by your school	Subject details	
		Subject name	Accountancy The name by which the subject is known in your school
	Accountancy Alternative Mathematics Applied Mathematics Art (core) Art (Other)	Default Learning Area Default MOE subject Default MOE Code	Mathematics / Pangarau for each associated option Accounting ACCO School Code AC
	Art Design Art History	Derdak MOE Code	
Art Painting Art Printing Art Printing Art Sculpure Biology/Biological Science Business Studies Catering & Hospitality Catering & Hospitality Catering & Hospitality Chemisty Chinese Classical Studies Clothing and Textiles Computer Studies Design Technology Drama Early Childhood Education Economic studies	Option classes	Options NZQA standards Hours Unattached options Print list Option details Option code 11AC Hours as if for full year 123 Mode of instruction This school Predominant mode Predominant mode Form 6 © Stand-alone © Integrated 	
l	Economics Dectronics Engineering Shopwork English		Learning Area Mathematics / Pangarau MOE subject Accounting
	Add new subject	Add option	MOE Code ACCO
	Delete selected subject	Delete option	Record option changes

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.

Subject details				
Subject name	English			The name by which the subject is known in your school
Default Learning Area	Language and L	anguages / Nga	Reo 💌	for each associated option
Default MOE subject	English		•	
Default MOE Code	ENGL	School Code	EG	Record subject changes

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.

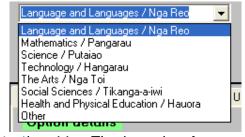


Illustration 44 : The Learning Areas popup

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.

	English	•	
	Chinese	~	
	Communication Skills	H	
	Cook Island Maori	≡	
Γ	English		
	English as a second language		U
	English (Remedial)		
	French		
	German	4	
	option code TOLU		

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.



Option classes	Options NZQA standards Hours Unattached options Print list
10EG	Option details
11EG 12EG	Option code 10EG
13EG	Hours as if for full year 0
9EG	Mode of instruction This school
	Predominant mode Face to face teaching mode has not yet been finalised by
	Learning zone Year 10 the M.O.E.
	Stand-alone
	Percentage 100
	Learning Area Language and Languages 💌
	MOE subject English
	MOE Code ENGL
	Record option changes

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.

Mode of instruction	This school	Predominant
Predominant mode Learning zone	This school Correspondence School Another NZ School Overseas school Another provider	mode has not yet been finalised by the M.O.E.

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.

Learning zone	Year 10 💌	
	Year 9	
	💿 🕙 Year 10	atec
	Year 11	
Percentage	100 Year 12 Year 13	
Feicenlage	Year 13	
Learning Area	Lang	
_	. The Learning Zone possibility	~~
mustration 48	: The Learning Zone possibiliti	es

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.

	🔘 Stand-alone	Integrated
Percentage	80	20
Learning Area	Language and Languages	🚽 Language and Languages 💌
MOE subject	English	Communication Skills
MOE Code	ENGL	СОММ

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.

Option classes	Options NZQA standards Hours Unattached options Print list
	Standards attached to : 13EG
10EG 11EG	Sort v code Display ALL versions
12EG 13EG	Select 🔘 Unit Standards 💿 Achievement Standards
9EG	Standards Code 9000102E DANC1.1 - Compose movement sequences 9000202E DANC1.2 - Perform dance say member of a group 9000402E DANC1.4 - View, interpret and respond to a dance performance 9000502E DANC1.1 - Use drama techniques 9000502E DANC1.1 - Use drama techniques 9000502E DRAM1.3 - Demonstrate knowledge of a dance gene or style 9000802E DRAM1.3 - Demonstrate knowledge of a drama/theatre form through a practical pres 9000802E DRAM1.4 - Verow interpret and respond to a dance device, structure and perform a drama 9000802E DRAM1.4 - Verom a macting role 900102E DRAM1.5 - Perform a technical or production role 900102E DRAM1.5 - Verform music as a featured soloist 9001302E MUSC1.3 - Compose pieces of music 9001302E MUSC1.4 - Aurally identity, describe and transcribe music elements from simple music 9001502E MUSC1.5 - Identity and describe fundamental materials of music 9001302E MUSC1.4 - Aurally identity, describe and transcribe music elements from simple music 9001302E MUSC1.4 - Compose pieces on music 9001302E MUSC1.4 - Compose pieces and procedures 90013
	9002702E ACC01.6 - Report financial information for an individual or household, and community 9002802E ACC01.7 - Analyse and interpret information for a sole proprietor(s)
Add option	9002901E ACC01.8 - Use a decision-making process to make a recommendation for entities 9003002E TIMA1.1 - Enter text from provided material and by direct entry composition 9003102F TIMA1.2 - Use standard operating and file management procedures
Delete option	Global attachment of standards to options Remove all Achievement Standard connections Exit

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.

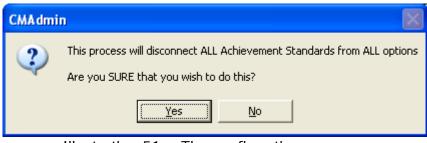


Illustration 51 : The confirmation message

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 un- attached are shown in the left hand column and attached standards are shown in the right.							
Please note : Only prefaced by Minist SFC- or Scholarship to a particular option be displa	try codes are liste or a Ministry cod	Either Select ALL unattached standards					
Unattached	Options	Attached	~	or click (and highlight) those standards which you wish to			
	11AC			transfer from either unattached to			
ACC01.1				attached or vice versa. Once			
ACC01.2				you have made you selection(s)			
ACC01.3				click the 'Transfer' button below.			
ACC01.4							
ACC01.5							
ACC01.6				Transfer			
ACC01.7							
ACCO1.8			_	Once you are satisfied with the			
	12AC		-	attachments, click the 'Save			
ACC02.1			- 10	changes' button to have these			
ACC02.2			- 18	recorded in the database.			
ACC02.3			- 10				
ACC02.4			- 10	Courselours and and			
ACC02.5			_	Save changes and exit			
ACC02.6			_				
<			>				
A missing option?	Is it in your option	n 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 prefaced by Ministry SFC- or Scholarship of to a particular option be display	y codes are listed b or a Ministry code C	Either Deselect ALL unattached standards	
Unattached ACC01.1 ACC01.2 ACC01.3 ACC01.4	Options 11AC	Attached	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.
ACC01.5 ACC01.6 ACC01.7 ACC01.8	1040		Transfer Once you are satisfied with the
ACC02.1 ACC02.2 ACC02.3 ACC02.4			attachments, click the 'Save changes' button to have these recorded in the database.
ACC02.5 ACC02.6		► >	Save changes and exit

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.

musac

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Please note : Only prefaced by Minist SFC- or Scholarship to a particular option be displa	ry codes are list or a Ministry co	Either Deselect ALL unattached standards	
Unattached	Options 11AC	Attached ACC01.1 ACC01.2 ACC01.3 ACC01.4 ACC01.5 ACC01.6 ACC01.7 ACC01.8	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.
	12AC	ACC02.1 ACC02.2 ACC02.3 ACC02.4 ACC02.5 ACC02.6	Once you are satisfied with the attachments, click the 'Save changes' button to have these recorded in the database. Save changes and exit

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.

Option classes	Options N	ZQA standards	Н
10EG 11EG 12EG 13EG	Sort	attached to) : 11
9EG	Standards	Code	^
	ENGL1.1	90052 02 E	
	ENGL1.2	90053 02 E	
	ENGL1.3	90054 02 E	
	ENGL1.4	90055 02 E	
	ENGL1.5	90056 02 E	
	ENGL1.6	90057 02 E	
	ENGL1.7	90058 02 E	
	ENGL1.8	90059 02 E	
	ENGL1.9	90060 02 E	

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.

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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.

Options NZQ/	A standards 🔰 H	Hours Unattached options Print list						
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 nur	Enter here the number of hours which would be spent in each option if the option was taken for the FULL year.							
		s move through (say) three sets of options per year then these entries will enario for Ministry returns.						
Option Hou								
10AT	0	Either enter the hours for						
10CL	0	each options separately						
10CP	0							
10EG	0	or select options from the						
10ES	0	table, enter the hours below, and click 'Set hours'						
10FR	0	and click set nours						
10HE	0	Hours: 116						
10HO	0							
10MA	0	Set hours						
10MS		Sechours						
10MU	0							
10MU	0							
10PE	0							
10SC 10SS	0	Record changes						
1055 10TD	0							
10TV	0							
11AC	0							
11AC	0							
11H0	0							
11MA	o 💌							

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.

Option	Hours	~	
10AT	116		Either enter the hours for
10CL	116		each options separately
10CP	116		
10EG	116		or select options from the
10ES	116		table, enter the hours below, and click 'Set hours'
10FR	116		and click set hours
10HE	116		Hours: 116
10HO	116		indio. Ino
10MA	116		
10MS	116		Set hours
10MU	116		
10MU	116		
10PE	116		
10SC	116		Record changes
10SS	116		
10TD	116		
10TY	116		
11AC	0		
1140	0		

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'.

Option	Hours	^	
10AT	116		Either enter the hours for
10CL	54		each options separately
10CP	54		
10EG	116		or select options from the
10ES	116	=	table, enter the hours below, and click 'Set hours'
10FR	54		and click bet hours
10HE	54		Hours: 116
10HO	54		
10MA	116		
10MS	54		Set hours
10MU	116		
10MU	116		
10PE	116		
10SC	116		Record changes
10SS	116		
10TD	54		
10TY	54		
11AC	0		
laaro,			

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.

Option classes	Options NZQA stand	ards Hours Unatt
10EG	Option details	
11EG 12EG	Option code	10EG
13EG 9EG	Hours as if for full year	116
3EG	Mode of instruction	This school
	Predominant mode	Face to face teaching

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.

Options NZQA standards	Hours	Unattached options Print list
Unattached options In your current default option set the options listed below are not attached to any subject		Auto-attach The button above will attempt to identify the listed options by
9MW 9TE 10CR 10MW 11MW	×	comparing their code with your subjects' 'school code' Where a match is made, the option will be added to that subject.
11LM 11MD 11MM 11LE 12CM 12OS 13TE 13MB		You can also select an option from this list, then click on the subject to which you wish to have it attached.
13MM 9BU 9HE 9WP	~	Print a list of unattached options

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.

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11AB 🔨
11WT - now attached to Workshop 💳
11F0
11FR - now attached to French
12AB
12EN
12E0
12PH - now attached to Art Photogra
12SC - now attached to Science/Alt
12TI
12WP
12ES - now attached to Economic st
12GD
12ME
12FR - now attached to French
12IN
12BU
12DE 🗸

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.

Options NZQA standards Hours	Unattached options Print list		
Printing options	H (1/5) H Q - A		
Select	Kairakau Primary School	Subjects, op	tions, star
Include options connected view to each subject	Subject Accountancy	MOE code Local code ACCO AC	
Include options and MOE proportions relating to each	Option 12AC 0 hrs 100	ACCO% 0 % ACCO% 0 % ACCO% 0 %	
Include the standards connected to each option	Alternative Mathematics] 🔳
or	Applied Mathematics Art (core)	ARTC AT]
Include just the standards connected to each subject	Option 9AT 0 hrs 100 Option 10AT 116 hrs 100	ARTC% 0 % ARTC% 0 %	
or List standards connected to more than one option	Option 12AT 0 hrs 100	ARTC% 0 % ARTC% 0 % ARTC% 0 %	
to more than one option	Art (Other)		J
Print	Art Design	ARTD DS	1
	Art History	ARTH AH	
	Art Painting	ARPA PT]
		ARTP PH ARTP% % ARTP% %	
	Art Printing Option 13PR 0 hrs 100	ARPR PR ARPR% %	
			>

Illustration 63 : The various printing options

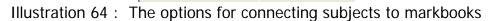


14.10 Markbook connections

From the main menu Configure Settings > Timetable Option Details > Connecting Subjects to Markbooks. It is also provided elsewhere in CMAdmin – 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.

۵,	Attaching students	to core markbooks
	Core Markbook Attachments	
	Option Markbook Attachments	



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.

			tachments fo	-	cts in 2008	
	Current	situation	Current se	et : 2008 in 2008		
		Select	those subjects wh	ich you would like	to process	
Core Markbook Attachments	Level	Subject	Markbook	Attached	Unattached	In order to be able to identify the
ttachments	9	9ENG	9ENG 2008	144	0	teachers of each core class, a lir must have been established to a
	9	9MAT	9MAT 2008	144	0	current timetable.
	9	9SCI	9SCI 2008	144	0	
n Markbook	9	9SOC	9SOC 2008	144	0	Timetable path : h:\TTSM\TT\
hments	9	9PED	9PED 2008	144	0	timetable patri : n: (i 15M(i 1)
	9	9HTH	9HTH 2008	144	0	
	10	10ENG	10ENG 2008	177	1	Timetable number : 71
	10	10MAT	10MAT 2008	177	1	
	10	10SCI	10SCI 2008	177	1	
	10	10SOC	105OC 2008	177	1	
	10	10PED	10PED 2008	177	1	
	I					Alter Timetable Link

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.

9AT 2004 9ES 2004	0 50	70 20	Timetable number : 4	Path identifi
	selection de settings for	tails timetable acce	ess	
Timetable p Timetable	ath	×	Exit	
			unattached students	C:\TT5 That's it!Cancel

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 while 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.

Default sett	ings for timetabl	le access	
Timetable path	C:\TT5\		
T:	TEACHERS.5A4	_	
Timetable			
	TEACHERS.533		Exit
	TEACHERS.541		Exit
	TEACHERS.571		
	TEACHERS.591	=	unattached students
	teachers.5a1		
	Teachers.5a2		
	TEACHERS.5A4		

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.



Mark	book a	ttachments fo	or Core subje	ects in 2004			
Current	Current situation Current set : 2004 options - first half year in 2004						
	Select	those subjects whi					
Level	Subject	Markbook	Attached	Unattached	In order to be able to identify the teachers of each core class, a link		
9	9EG	9EG 2004	71	0	must have been established to a		
9	9MA	9MA 2004	71	0	current timetable.		
9	9SS	9SS 2004	71	0			
9	9SC	9SC 2004	71	0	Timetable path : C:\TT5\		
9	9PE	9PE 2004	127	0	rimetable patri. C. (115)		
9	9AT	9AT 2004	70	0			
9	9ES	9ES 2004	120	0	Timetable number : 4		
	CMAd	lmin			Alter timetable link		
I	A total of 210 students were attached to markbooks						
					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

Year	2004	•	Level	'ear 11 📃 👻		ach unattached to options - first half ye	ear
			7	All levels		opdons - niscridii ye	sai
Option	Mark	(book	Col Set 1	'ear 9	Col Set 2		
			2004 optio		2004 options - s	second half year	
			Attached	'ear 11 'ear 12	Attached	Unattached	
				'ear12 'ear13	0	0	
11AC	11AI	C 2004	17 -	U	0	0	
11AR	11M	W 2004	7	5	0	0	
11AS	11A9	5 2004	2	3	0	0	
11AT	11A	T 2004	10	1	0	0	
11CL	110	L 2004	3	0	0	0	
11CP	110	P 2004	17	0	0	0	
11EC	11E	C 2004	0	0	0	0	
11EN	11M	A 2004	59	20	0	0	
11EO	11E	G 2004	65	32	0	0	
11ES	11E	5 2004	8	1	0	0	
11F0	11T'	Y 2004	7	8	0	0	
11FR	11M	U 2004	16	0	0	0	
11GD	11W	W 2004	1	2	0	0	
11HE	11H	E 2004	8	3	0	0	
11HO	11H	0 2004	8	0	0	0	
11JA	11G	E 2004	31	5	0	0	
11LE	11LE	E 2004	1	0	0	0	
11LM	11LI	M 2004	10	4	0	0	
11MD	11M	D 2004	17	70	0	0	
11MM	11M	A 2004	0	0	0	0	
11PE	11M	S 2004	10	0	0	0	
11SS	115	5 2004	33	6	0	0	
11TD	11TI	D 2004	11	0	0	0	
11TW		w 2004	0	0	0	0	
11WP	11H	1 2004	3	2	0	0	
11WT		C 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.

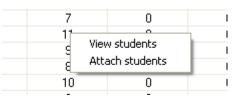


Illustration 95 : The popup menu accessed by right-clicking a number

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 M	larkbook attachm	ents			
Year	2004 💌	Level Ye	ear 11 👤	Sear	ch for connections
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
11AB	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
11F0	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 Waiopehu 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.

🖻 Dossier Maintenance		
Create or maintain a staff member's	details and d	lossiers.
Currently listed staff members		Staff member's details
Image: Second	Surname First name Username Password Title Email address Details Code Year levels taught School	MUSAC Musac MUSAC ***** Miss V MUM Class Rm16MW V 0 0 1 2 3 V 4 V 5 6 7 8 School V
Print a List of Staff Members	Dossier Maintenance	Save Changes to this Member's Details Adjust Group Memberships for this Member
Staff member ; Musac MUSAC	-	

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.

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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.

roup memberships					
Staff member's name : Musac MUSAC			Student Manager rights		
Default Group	\odot	^	Right		I
TTSM Administrator	0		Access Edit/add students' details	Yes	1
Full SM	\odot		View-only access to all student details	Yes	L
Full CM	0		Printing utility	Yes	I
			MOE Returns	Yes	
			Direct entry to just teacher's own classes	Yes	L
			Financial	Yes	L
			Pastoral	Yes	L
			Configuration	Yes	L
			Utilities	Yes	L
			Backup utility	Yes	L
			Change databases	Yes	L
			Add new students	Yes	L
			Access the data cube	Yes	L
			View only access to financial details docume	Yes	L
			View only access to students' options docum	Yes	L
			View only access to pastoral details docume	Yes	
			View only access to sensitive information do	Yes	
			View only access to caregiver details docume	Yes	
			View only access to Ministry details documer	Yes	
			Access Autonavments processes	Yes	L
		~	This display is for information only. Individua may only be adjusted via group membership:		s

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.

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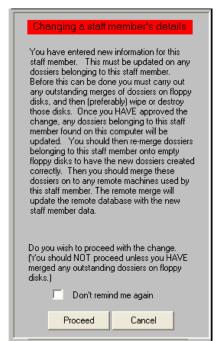


Illustration 6: The screen which appears when you change a teacher's code

You can print a list of staff members, via the dialogue shown below.

Print a list of staff members Print just bosic details Include 'Details' Include list of dossiers Munt chart of staff rights	n Alan on Scott divid John r Roty e Lonaine ripot Dennis ns Sharon nes Michelle Jenny siton Annie Della r Oliver Jenny stim Jane immy Chris Mike ira Matt iii Penny on Maatte o Jenny AC Musec	
	pers Jim a Violet Patterson John	

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.

Subdirectories	Documents are available for two o	different screen resolutions					
Allocating Subdirectories to Staff	Current display	/: 1024 x 768					
One Staff Member's	Document name	Status	Modified	Original		~	Restore all Standard
Subdirectories	Alumni details.dmt	MUSAC standard	14/09/2004	14/09/2004			Documents
	Attendance details.dmt	User defined	05/11/2008				
Allocating Basic	Caregivers.dmt	MUSAC standard	28/08/2002	28/08/2002			Restore Selected
Documents	Emergency contact.dmt	MUSAC standard	15/09/2003	15/09/2003			Documents
Updating Basic	Enrolment details.dmt	MUSAC standard	03/03/2008	19/05/2010	۲		
Documents	Financial details.dmt	MUSAC standard	16/01/2006	16/01/2006			Import all New
	Financial.dmt	MUSAC standard	23/05/2003	23/05/2003			Documents
	Leaving details.dmt	MUSAC standard	25/11/2009	25/11/2009			
	Mailing details.dmt	MUSAC standard	25/09/2008	25/09/2008			Import Selected Nev Documents
	Medical.dmt	MUSAC standard	15/09/2008	15/09/2008			Documents
	Ministry details 2.dmt	MUSAC standard	25/11/2009	06/10/2010	۲		Delete Selected
	Ministry details.dmt	MUSAC standard	18/09/2009	06/10/2010	۲		User-defined Documer
	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	۲		
	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

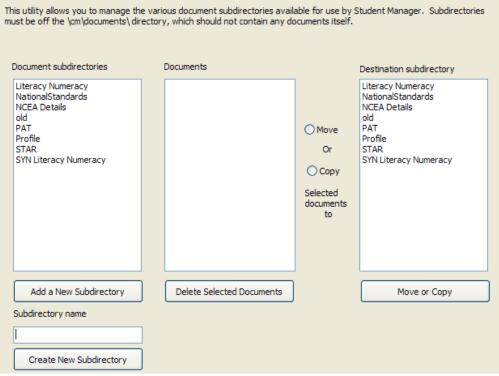


Illustration 25 : Creation of document subdirectories

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.

Select teachers	Select directories	The directory documentshold contains the following documents
Miss Jenny DYER Miss Michelle Downes Miss Michelle Downes Miss Michelle Downes Miss Sandra Smith Miss Sandra Smith Miss Sandra Smith Miss Sandra Smith Miss Sandra Smith Mir Andrew Skerman Mir Chris Jaines Mir David Stout Mir First Pittuck Mir First Pittuck Mir Jim Nuggers Mir John Patterson Mir John Patterson Mir John Patterson Mir John Patterson Mir Mattin Thrupp Mir Matt Mataira Mir Meter HOOGENDOORN Mir Peter Peters Mir Richard Riley Mir Russell Trethewey Mir Scott Ashton	2002ReportDocuments documentshold Jenny Rory test	Cumulative Record.dmt HIBSMulti Interim.dmt PAT Individual Yr Sum Yr7.dmt PAT Individual Yr Sum Yr8.dmt PAT ListComp Yr 3_60.dmt PAT ListComp Yr 5_60.dmt PAT ListComp Yr 5_60.dmt PAT ListComp Yr 6_60.dmt PAT Maths Yr 10_60.dmt PAT Maths Yr 10_60.dmt PAT Maths Yr 7_G0.dmt PAT Maths Yr 7_G0.dmt PAT Maths Yr 7_AgeP2D all.gph PAT Maths Yr 7_ClaS2D all.gph PAT Maths Yr 8_AgeP2D.gph PAT Maths Yr 8_Ball.dmt PAT Maths Yr 8_Ball.dmt PAT Maths Yr 8_ClaS2D phist.gp PAT Maths Yr 8_ClaS2D gph PAT Maths Yr 8_G0.dmt
Hold Ctrl to multiselec	Save this selection	Delete selected

Illustration 27 : Allocating directories to staff members

Viewing a staff members' directories and documents

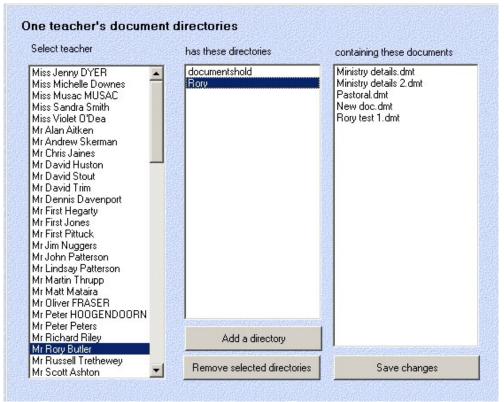


Illustration 28 : Moving documents between directories



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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:

One teacher's document directories Select teacher has these directories Select directories Miss Jenny DYER documentshold 2002ReportDocuments * Miss Michelle Downes documentshold Miss Musac MUSAC Jenny Miss Sandra Smith Rory Miss Violet O'Dea test Mr Alan Aitken Mr Andrew Skerman Mr Chris Jaines Mr David Huston Mr David Stout Mr David Trim Mr Dennis Davenport Mr First Hegarty Mr First Jones Mr First Pittuck Mr Jim Nuggers Mr John Patterson Mr Lindsay Patterson Mr Martin Thrupp Mr Matt Mataira Mr Oliver FRASER Mr Peter HOOGENDOORN Mr Peter Peters Mr Richard Riley Add selected Mr Rory Butler Mr Russell Trethewey Remove selected directories Mr Scott Ashton -

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.

Select teacher	has been allocated these documents	Select from :
Miss Jenny DYER Miss Michelle Downes Miss Musae MUSAC Miss Sandra Smith Miss Violet O'Dea Mr Alan Aitken Mr Alan Aitken Mr Chris Jaines Mr David Huston Mr David Stout Mr David Stout Mr David Stout Mr First Hegarty Mr First Hegarty Mr First Hegarty Mr First Hegarty Mr First Jones Mr First Pittuck Mr John Patterson Mr Mattin Thrupp Mr Mattin Thrupp Mr Mattin Thrupp Mr Mattin Thrupp Mr Mattin Thrupp Mr Peter HODGENDOORN Mr Peter Peters Mr Richard Riley	Personal details.dmt Caregivers.dmt Medical.dmt Financial.dmt Ministry details.dmt Photo album 1-6.dmt School defined.dmt Historical a.dmt Sensitive.dmt Attendance details.dmt Historical a.dmt Sensitive.dmt Attendance details.dmt	Ministry details.dmt Personal details.dmt Caregivers.dmt Maoiri details.dmt Mailing details.dmt Medical.dmt Enrolment details.dmt Timetable.dmt Photo album 9-14.dmt Renamables 1.dmt Renamables 1.dmt School-defined.dmt School-defined.dmt School-defined.dmt Default.dmt Emergency contact.dmt Financial.dmt Sensitive.dmt Options.dmt Historical a.dmt Leaving details.dmt Photo album 1-6.dmt Photo album 1-8.dmt
Mr Rory Butler Mr Russell Trethewey Mr Scott Ashton	Clear all	Attendance details.dmt Default notes.dmt Pastoral.dmt
Mrs Betty Jago Mrs Brenda KEAN	Save this selection	Personal details Sec.dmt

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

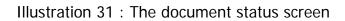
From time to time MUSAC may release more basic documents, we may alter original basic documents, or you may, yourself alter basic documents. The status of each document is displayed in the right hand column and some may have a red, green or blue dot against them indicating the status shown at the bottom 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.

Document name	Status	Modified	Original		^	Restore all Standard
Alumni details.dmt	MUSAC standard	14/09/2004	14/09/2004			Documents
Attendance details.dmt	User defined	05/11/2008				
Caregivers.dmt	MUSAC standard	28/08/2002	28/08/2002			Restore Selected
Emergency contact.dmt	MUSAC standard	15/09/2003	15/09/2003			Documents
Enrolment details.dmt	MUSAC standard	03/03/2008	19/05/2010	۲		
Financial details.dmt	MUSAC standard	16/01/2006	16/01/2006			Import all New
Financial.dmt	MUSAC standard	23/05/2003	23/05/2003			Documents
Leaving details.dmt	MUSAC standard	25/11/2009	25/11/2009			
Mailing details.dmt	MUSAC standard	25/09/2008	25/09/2008			Import Selected New
Medical.dmt	MUSAC standard	15/09/2008	15/09/2008			Documents
Ministry details 2.dmt	MUSAC standard	25/11/2009	06/10/2010	۲		Delete Selected
Ministry details.dmt	MUSAC standard	18/09/2009	06/10/2010	۲		User-defined Document
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	۲		
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		v	

New standard documents supplied by MUSAC



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.

SM Utilities version 6.16	5.629 28/10/2008 M	USAC MUSAC Middle Ea	arth School C:\CM\CM.	mdb
Help				
2 Backup or Restore Data	Convert Pf5 Leavers	Who is Accessing the Database?	Remove Deletes from the Database	Clear Renamable Categories
Change Final Year to Leavers	Transfer Students Between Databases	Import or Export Student Data	Internet Domain Allocation	Case Conversion
Eamily Utilities	Board Of Trustee Elections	Special Exports / Imports	Manage Students' Photos	View Basic Student Data
View the Log File	View the Register	View <u>P</u> df-saved Letters	Email Students' Documents	End-of-year Data Roll-over
Prepare a Library Dpdate Disk	y Import NSN Updates	View get / Check NSN Log	@ Get / Check NSN	

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.

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.

			lanager databases.		adjusted by sliding their joins			
Computer		Login Name	User name	Program	n	Date In	Time In	Duration
V		Musac MUSAC	reading 2	Shell		28/05/2009	12:13	101 min
V		Musac MUSAC	10000	SM Utili		28/05/2009	12:14	100 min
V	47826	Musac MUSAC	nomé	Studen	t Manager	28/05/2009	12:14	100 min
		Pause	e List Generation (To Al	low Viewing)	Print this List			
	-	o all current user	e List Generation (To Al is of ClassRoom Man Cause automatic shutd	nager and Stu	r seconds.			
	-	o all current user	s of ClassRoom Man	nager and Stu	ident Manager	sage		
Please typ	e in your n	o all current user nessage below.	s of ClassRoom Man Cause automatic shutd e may be designing	ager and Stu	r seconds.			
Please typ You are n naturally Alternativ	e in your n to doubt s object si vely you ca	o all current user hessage below. aware that people trongly to being c	s of ClassRoom Man Cause automatic shutd e may be designing closed down! Please ge displayed and have p	documents o use this proc	r seconds. Send Mes r doing print runs and would			

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!

ease exit from Student Manager or C odate.	ClassRoom Manager as I am ab	oout to install t	he latest	Send Messa
u are no doubt aware that peo turally object strongly to being				
Alternatively you can have your mes until YOU return here to release				

Illustration 12 : A message ready to be sent

A further example of a message about to be sent is shown below.

J	🖻 Message from :							
	Hi Brian	Send message to :						
	Would you meet me in the staffroom please. I've fi junior reports and they are available for you to sign Thanks	CMAdmin X (AS) Ashton, Scott (BA) Baumfield, John (BK) Kean, Chris						
	Rory	1 messages sent (BT) Butler, Rory (CJ) Jaines, Jim (CL) Clarke, Lorraine						
)		OK (DG) Diggins, Sharon (DN) Downes, Michelle (DV) Davenport, Denn						
	Send Print	Delete and exit (DY) Dyer, Jenny (EG) Eggleston, Annie 💌						

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.

B M	essage from : BT		
Hi Bi Wou	uld you meet me in the staffro r reports and they are availa nks	oom please. I've fir	
	Reply	Print	Delete and exit

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'.

Ren	noval of deleted students	
F	The students listed below have been tagged for de from the database.	letion
F	LEPPER, CHARLES MILLARD, MICHAEL WILTON, PHILIP	Remove these students

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.

S



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.

udent Manager change final year students to leavers							
Change final year to leavers							
This utility will change the status of any full time or part time students in the nominated 'final' year to a status of 'leaver'. This information will also be recorded in the register.							
0 Yr0 1 Yr1 2 Yr2 3 Yr3 4 Yr4 5 Yr5		time students in the selected eir status changed to 'leaver'					
6 Yr6 9 Form 3	Date of leaving	22/11/2011					
10 Form 4 11 Form 5	Destination						
12 Form 6 13 Form 7 14 Adult Pupils	Transfer to anoth	er NZ school or to Homesd 💌					
15 Adults ov 20	Destination school						
		•					
		Proceed					

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.

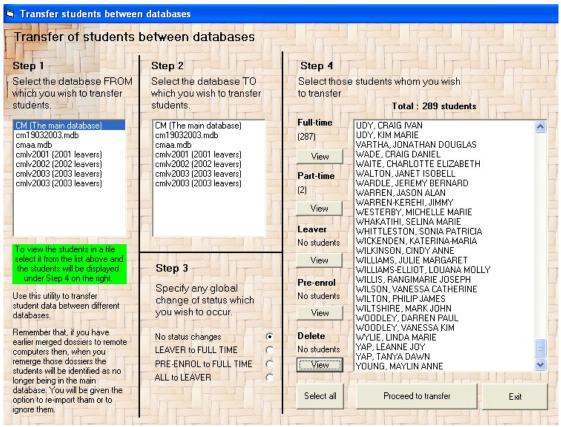


Illustration 2 : The transfer screen

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...

	between databases		
Step 1	Step 2	Step 4	
Select the database FROM which you wish to transfer students.	Select the database TO which you wish to transfer students.	Select thos to transfer	e students whom you wish Total : 13 students
CM (The main database)	CM (The main database)	Full-time	Bennett, Alyssa May
cm19032003.mdb	cm19032003.mdb	No students	Bennett, Richard James
cmaa.mdb	cmaa.mdb	NO SIGUERIIS	Bryce, Carlos
cmlv2001 (2001 leavers)	cmlv2001 (2001 leavers)	View	Connor, David Jean-Michel
cmlv2002 (2002 leavers)	cmlv2002 (2002 leavers)		– Cooke, Conal Peter Robb
cmlv2003 (2003 leavers)	cmlv2003 (2003 leavers)	Part-time	Cowan, Andre
cmlv2003 (2003 leavers)	cmlv2003 (2003 leavers)	No students	Croote, Kent Reg Devenney, Jessica Liane
			Doolan, James Thomas
		View	Duzevich-Ryder, Leisha Waipare
F-			Dyason, Charlotte Jane
		Leaver	IRVINE, Glen Thomas
		(13)	MCMANUS, Briana Gail
To view the students in a file select it from the list above and			
the students will be displayed	Step 3	View	-
under Step 4 on the right.			1
	Specify any global	Pre-enrol	
Use this utility to transfer	change of status which	No students	
student data between different	you wish to occur.	View	
databases.	you mon to occur.	VICYV	-
Remember that, if you have	No status changes	Delete	1
earlier merged dossiers to remote	and the second se	and the property of the second second	
computers then, when you	LEAVER to FULL TIME C	No students	
emerge those dossiers the	PRE-ENROL to FULL TIME	View	-
students will be identified as no	ALL to LEAVER		
onger being in the main database. You will be given the			
option to re-import tham or to		Select all	Proceed to transfer Exit
anore them.			

Illustration 3 : Selection of students for transfer

- 1 Select the leavers file from the left had 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...

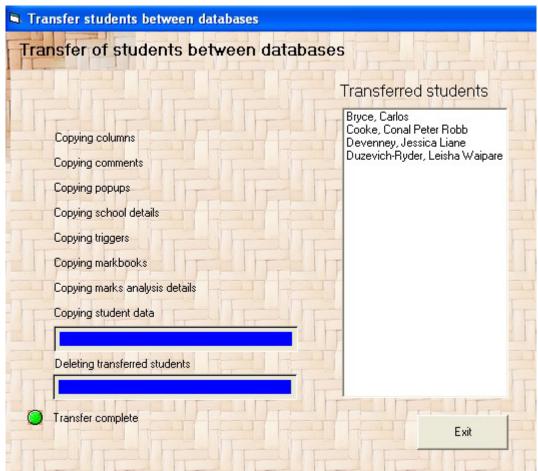


Illustration 4 : The transferral process

... 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.

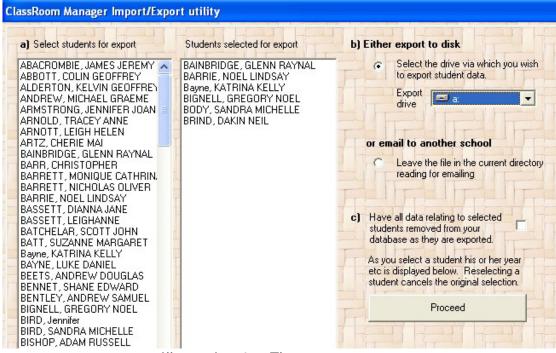


Illustration 6 : The export screen

After 'Proceed'ing, the following message was received.

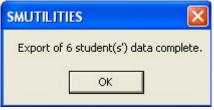


Illustration 7 : Process complete

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.

🖪 CMImpExp.txt - Notepad 💦 🔲 🔀
<u> E</u> ile <u>E</u> dit F <u>o</u> rmat <u>V</u> iew <u>H</u> elp
39#41~Relationship~Father 39#41~Relationship~Mother 229#00000000.0000 230#00000000.0000 231#00000000.0000 233#00000000.0000 234#00000000.0000 235#00000000.0000 236#00000000.0000 237#00000000.0000

Illustration 8 : A portion of an export file

The Import Process



This is the reverse process, the screen for which is shown below.

Identify the file (CMImpExp.txt) which holds the student data which you wish to import	ь)	The students shown below an Matched students will have th unmatched students will be ac	eir data updated and	c)	When you are ready to proceed with the import click
File file		Name	Lk 🔺		Proceed
×.txt				F	
Source school :	F				相同作
Creation date :	41			F	
Students in file :					

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.

a) Identify the file (CMImpExp.txt) which holds the student data which you wish to import	b) The students shown below are those from the import file Matched students will have their data updated and unmatched students will be added to the database.			
File file	Name	Lk		
	BAINBRIDGE, GLENN RAYNAL			
*.txt	BARRIE, NOEL LINDSAY			
	Bayne, KATRINA KELLY			
Source school :	BIGNELL, GREGORY NOEL			
The Kuranui Project	BODY, SANDRA MICHELLE			
The second second second	BRIND, DAKIN NEIL			
File created : 19/03/2003				
Student in file : 6				
Students not matched : 0				

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

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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.

	Click here for 'Help!'	
ither select a previously saved xport design	or design a new one Either	Selected columns
	or select just specific columns 1 2 3 4 5 Columns Student details PAT TOSCA Staff Columns Record of Achievement	Clear selected columns
Create a new export design	Careers Absence Summary Details NZQA Standards Comment Area Reports	
Design title	and/or derived information.	
Save design	Select information derived from columns	Proceed to final steps

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'.

φc	nt of selected data Step 1
E	Exporting data
Т	his utility allows you to export student data in a variety of formats.
lr	the first step you have to decide about which columns you wish to export.
	you have used this process before, and saved your selection of columns, then you can simply select a previous design from t t on the left and proceed directly to the next steps.
e	Iternatively, you can make a new selection of columns. To do this, use the options in the central area of the screen. You car ther select one of the possibilities from the drop-down list at the top of the central area, or you can use the 'Column picker' to alect those individual column which you wish to export.
	he columns which you have selected appear in the list on the right hand side of the screen. If you re-select a column it will be moved from the list.
0	nce you have completed your selection, you might wish to give it a name and save it (if you suspect that you might use it aga
	step 2 you can select the pupils for whom you wish to export data. Initially, all students in your current filter will be displayed, ou can apply a futher filter should you wish to do so. You can then select individuals from the list of filtered students.
	step 3 you select the format which you wish to use for your export. Beware of exporting ALL Cm or SM columns (or both) for rge number of students as this could generate a rather large file!
	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 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.

🦺 RTF code selection					×
Caregivers) CF Specials) Columns)	Financials Count Specials) Activi Grade spec Genders		· · · · · · · · · · · · · · · · · · ·	ric Caregiver
School MUSAC Date 1	Date 3	C	urrent age (yy.mm.dd)	Time since started schooling (yy.mm)	
Date 2 User name 1 ML	Date 4		an 1st age (yy.mm.dd) an 1st age (yy.mm)	Time at this school (yy.mm) Time since leaving school (yy.mm)	
User name 2 Form teacher Mr		T	ime since enrolled	Time in New Zealand (yy.mm) Time at this school (yy years mm months	
	F Teacher F Teacher		Local student ID	Time in NZ (yy years mm months) Weeks since started schooling	
Current date dd Month Year Current date dd/mm/yyyy	r Current year Next year	Horizontal title Vertical title	Form Tutor	Page Number Page number	

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.



or design a new one Either	Selected columns
All national CM columns	Select ALL national columns
or select just specific columns	All national CM columns
1 2 3 4 5 Column	
Student details	
PAT	
TOSCA	
Staff Columns	
Record of Achievement	
Careers	
Absence Summary Details	
NZQA Standards	
Comment Area	
Reports	

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.

Either select a previously saved export design	or design a new one Either
	All national SM columns
	All national CM columns All CM and SM columns
	1 2 3 4 5 Columns
	Student details
	PAT
	TOSCA
	Staff Columns
	Record of Achievement
	Absence Summary Details
	NZQA Standards
	Comment Area
	Reports
Create a new export design	
Design title	
Manual Demonstration	and/or derived information.
Save design	Select information derived from columns

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.

Step 2	Selected students	Step 3 Select export format
	Students	Please select
	ABACROMBIE, JAMES JEREMY, 9	
Apply a further filter	ABBOTT, COLIN GEOFFREY, 14	
	ALDERTON, KELVIN GEOFFREY, 15	Include a 'headings' record
N.B. Only students in your current	ANDREW, MICHAEL GRAEME, 12	
filter will be available for inclusion in	ARMSTRONG, JENNIFER JOAN, 11	
the export	ARNOLD, TRACEY ANNE, 13	
	ARNOTT, LEIGH HELEN, 12	
	ARTZ, CHERIE MAI, 9	
	BAINBRIDGE, GLENN RAYNAL, 12	
	BARR, CHRISTOPHER, 12	Step 4
	BARRETT, MONIQUE CATHRINA, 10	5(0p 4
	BARRETT, NICHOLAS OLIVER, 12	Present to support
	BARRIE, NOEL LINDSAY, 13	Proceed to export
	BASSETT, LEIGHANNE, 9	
	BASSETT, DIANNA JANE, 12	
	BATCHELAR, SCOTT JOHN, 13	
	BATT, SUZANNE MARGARET, 9	
	BAYNE, LUKE DANIEL, 10	
	Bayne, KATRINA KELLY, 13	
	BEETS, ANDREW DOUGLAS, 12	
	BENNET, SHANE EDWARD, 9	
	BENTLEY, ANDREW SAMUEL, 11	
	BIGNELL, GREGORY NOEL, 12	
	BIRD, Jennifer, 9	
	BIBD SANDBA MICHELLE 10	<u>×</u>
Return to step 1	Select all	

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).

Options	iroups		tandards ce & Ethnicity	nools umns		Activities Type	Mark Books	
Years Year 9 Year 10 Year 11 Year 12 Year 13	Selecte 10AK 10AS 10ED 10F0 10JS 10MK 11DN 11DV 11HP 11M0 11PA 11PK	d Forms 11PT 11RA 12CJ 12MA 12MC 12DA 12TH 12WS 13AD 13SK 9HG 9HU	9KA 9ML 9NU 9PE 9ST	Selected Gro long VF1 VF2 VF3 VF4	ups	Status Full time Part time Leaver Pre-enrolment Delete Reset the filter to j Full and Part tim students		
						Proceed		

Illustration 18 : The 'Extra filter' process

Once you have applied your filter the resulting students will be displayed....

Selected students	Step 3 Select export format
Students ABBOTT, COLIN GEOFFREY, 14 ALDERTON, KELVIN GEOFFREY, 15 ANDREW, MICHAEL GRAEME, 12 ARMSTRONG, JENNIFER JOAN, 11 ARNOLD, TRACEY ANNE, 13 ARNOTT, LEIGH HELEN, 12 ARTZ, CHERIE MAI, 9 BAINBRIDGE, GLENN RAYNAL, 12 BARR, CHRISTOPHER, 12 BARRETT, MONIQUE CATHRINA, 10 BARRETT, NICHOLAS OLIVER, 12 BARSETT, LEIGHANNE, 9 BASSETT, LEIGHANNE, 9 BASSETT, DIANNA JANE, 12 BATCHELAR, SCOTT JOHN, 13 BIGNELL, GREGORY NOEL, 12 BIRD, Jennifer, 9 BIRD, SANDRA MICHELLE, 10 BISHOP, ADAM BLISSELL, 11	 Please select A comma-delimited file A tab-delimited file Export to Excel A MUSAC format file Step 4 Proceed to export
Select all	

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.

Save As			?×
Save in:	СМ 🔁	- E 📸 📼 -	
My Recent Documents Desktop	backup cmbmps config documents emails eReturns financial docume	in zqa in PDA Synch in PDA Synch in PLbmps in Setup in smdocs ents in Setup	
My Documents	Help Hillcrest Hillcrest Hillcrest Hillcrest Hillcrest Hillcrest Hetters Hetters Hetters Hetters Hetters	Construction C	
My Computer	<		>
My Network Places	File name: Save as type:	demo.txt *.txt	Save Cancel

Illustration 20 : The export file path and name

At the conclusion of the export process the Step 4 area will appear as shown below.

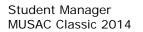
Step 4	
Proceed to Export	
Export complete	
,	

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.

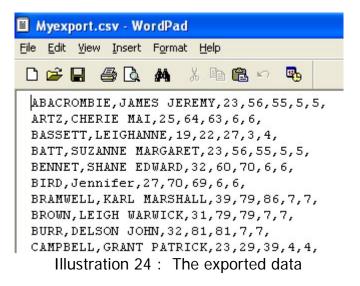
We could have also clicked on the button at the bottom of the first column. This allows us to export 'derived' information - such as the students' current debts, their 'Third caregiver's' phone number etc.

- 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.

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However, the program automatically opens Excel - where the data is displayed in a spreadsheet.

N 12	Microsoft Excel - Myexport.csv								
	🕙 File Edit View Insert Format Tools Data Window Help								
	🖻 🖬 🔒		🌮 🐰 🖻	B 10 .	🤮 Σ 🤅	f≈ 2↓ 🛍	? * A	rial	
	A1	-	= ABACR	OMBIE					
	Α	В	С	D	E	F	G	Н	
1	ABACRON	JAMES JE	23	56	55	5	5		
2	ARTZ	CHERIE M	25	64	63	6	6		
3	BASSETT	LEIGHANN	19	22	27	3	4		
4	BATT	SUZANNE	23	56	55	5	5		
5	BENNET	SHANE EI	32	60	70	6	6		
6	BIRD	Jennifer	27	70	69	6	6		
7	BRAMWE	KARL MAR	39	79	86	7	7	l.	
8	BROWN	LEIGH WA	31	79	79	7	7]	
9	BURR	DELSON J	32	81	81	7	7		
10	CAMPBEL	GRANT PA	23	29	39	4	4		
11	CLARK	BRUCE M	ALCOLM						

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.

Carl .	still in the cm database		
	MCGREGOR,		
- 22	still in the cm database	_	
1	MCPHAIL,		
100	still in the cm database		
	OSBORNE,		
1.28	still in the <u>cm database</u>		
10	PALMER,	-	
1	still in the cm database	×	
	Proceed to import		

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.

	student and staff information relating to their individual network ss used to generate web and email identities).
Step 1 Connection type	NT connections O Windows 2000 connections
Step 2 Group being connected	• Students O 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	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.
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 V V
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



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- 2. Select 'Students'
- 3. The format of the students' ids.

The following choices are offered :

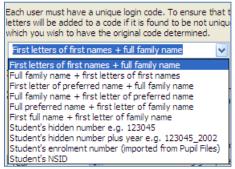


Illustration 27 : The format for the generated logon ids

- 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.

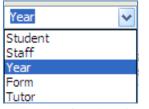


Illustration 27 : Identifies the group

5. Email domain name - an example of which is shown below.

		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)		
		school@name.school.hz		

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.

Save As		? >	<
Save in:	🗁 СМ	• 🖬 📩 🖬 •	
My Recent Documents Desktop My Documents	 backup cmbmps config documents emails Financial documents imports jenMOEPastoral Letters media Meetings backup Natcols 	 nzqa PDA Synch pdf sm docs4dist smdocs smdocsb smhelp smlitedocs smlitedocsb system templates wizards 	ر میں ایک
My Computer		>	
My Network Places	File <u>n</u> ame: induct.csv Save as <u>type:</u> *.csv	✓ <u>S</u> ave ✓ Cancel	

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.

N	🔀 Microsoft Excel - induct.csv							
	📳 File Edit View Insert Format Tools Data Window Help							
	🗅 🚅 🔚 🚑 💁 🕵 💖 👗 🛍 🛍 🕬 - 🍓 Σ 🍂 ટੈ↓ 🛍 📿 🐥 Arial							
	A1 💌 = jjabacrombie							
	Α	В	С	D	E	F	G	
1	ijabacromb	7350	JAMES JE	Year 9	jjabacroml	oie@kairak	(au.school.)	nz
2	cgabbott	5801	COLIN GE	Year 14	cgabbott@)kairakau.s	school.nz	
3	kgalderton	6216	KELVIN G	Year 11	kgalderton	@kairakau	u.school.nz	
4	mgandrew	3606	MICHAEL	Year 12	mgandrew	@kairakau	J.school.nz	8
5	jjarmstrong	3718	JENNIFER	Year 11	jjarmstron	g@kairaka	u.school.nz	2
6	taarnold	7973	TRACEY A	Year 13	taarnold@	kairakau.s	chool.nz	
7	lharnott	1126	LEIGH HE	Year 12	lharnott@l	kairakau.si	chool.nz	
8	cmartz	7847	CHERIE M	Year 9	cmartz@k	airakau.so	:hool.nz	
9	grbainbridg	8330	GLENN RA	Year 12	grbainbridg	ge@kairak	au.school.n	IZ
10	cbarr		CHRISTOR stration 30		cbarn@kai erated out		ool.nz	

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 person Press the first letter of the require name. (click 'clear display' prior to	d st	udent's family	
SADDON, Ali Barry SALLARS, Arnuchit SAMAROS, Terence Kane	^	Student	SADDON, Ali Barry
SAO, Jay Jay Jules SCATT, Jesse		Login ID	lindab
SEKENIWE, Vincent Xavier SELEMEN, Jordan Thomas SEMOETE, Havden Andrew		Pin number	2337
SEYRING, Dallas Wilson Tuasivi SHAPHARD, Justice SHARROCK, Conrad		Group ID	Year 10
SHOW-PIDWELL, Shilisa Paretaha SILIMIN, Jamee-May			
SIMKIN, (hira) Matthew SINGH, John Meihana	~	Clear Displa	y 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 utili	ty		
Step 1 : Choose case			
Convert to upper case	0	Convert to sentence case	۲
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.

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.	Summer 201
Proceed	
Process 2 Identify youngests and eldests	
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 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!

Process 1 Check families	PTD 0500 1
Process 1 Check families	BIRGESS, Jesse
This process will ensure that each student is in a family, and will create a family	already in STRATTON Angela
definition, if necessary for students not already in one.	BIRKIN, Siobhann
	already in McCALLUM Kelly
	BISHOP, Denny
Proceed	already in Parent/Cgvr Denny MAGUIRE
	BITIVIGONE, Valerie
	already in JOHNSON Isaac
Process 2 Identify youngests and eldests	BITT-BROWN, Haydyn
	already in BETTRIDGE Simone
This utility will identify which students are youngest and which are eldest in	BITTERS, Wiremu
each family	already in PICKERING Nadine
The second	BIWLIN, Raukawa
If 'place in family' refers to just family members at school then this calculation	already in KARENA Kim
will be included in the process	BLECK, Garrett
'Place in family' refers to just family members at school	already in TROMP Tingi
	BLYTHO, John
Proceed	already in HALL Brodwyn G
FIOLECU	BOKER, Keanu
	already in REI-TAUREREWA Cheryl
Process 3 Remove families with no connections	BOLLOCK, Channing
FIOCESS 5 Remove families warno connections	already in DYKE Andrew
Proceed	BORCLOY, Hamish
Proceed	already in Parent/Cgvr Hamish CLARK
	BORTRUM, Joji
Process 4 View / modify family memberships	already in NAVITIO Loata S
rocess r new plant, hended app	BOTTRIDGO, Peter
Proceed	already in RENATA Derek T
Proceed	BREDER, Jamal
	already in WATANA Rauna
	BREDER-WEARE, Leon
	already in JOHNSTON Philippa
	BREGHT, Todd

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 youngests and eldests in each family

Many schools prefer to use the youngests to deliver school newsletters to the family home.

musac

Process 1 Check families	AUE Nicholette
This process will ensure that each student is in a family, and will create a family	Youngest : NYUNHUIS, Amiria
definition, if necessary for students not already in one.	Eldest : NYUNHUIS, Amiria
definition, if necessary for students not already in one.	BAKER Mark M
	BANKS Georgina
Proceed	BANKS Gina
	Youngest : POPPLE, Philip
	Eldest : POPPLE, Philip
Process 2 Identify youngests and eldests	BANNISTER Angela
PIOCESS Z Identity youngests and Eldests	Youngest : WUITOKIU, Jamie
This utility will identify which students are youngest and which are eldest in	Eldest : WUITOKIU, Jamie
each family	BARCI AY Fiona
caurranny	BARTRUM Elizabeth
If 'place in family' refers to just family members at school then this calculation	Youngest : NAWTON, George
will be included in the process	Eldest : NAWTON, George
_	BATIVAGONE Akevai
'Place in family' refers to just family members at school 🛛 🔽	BATT-BROWN Gave
	Youngest ; RARAKURA, Jerome
Proceed	Eldest : RARAKURA, Jerome
	BEAMSLEY Fav
Process 3 Remove families with no connections	Youngest : ROVUTUBONONITU, Ben
11000000	Eldest : ROVUTUBONONITU, Ben BEARD Ruth
Proceed	
Froced	Youngest : CAAKE, Konrad
	Eldest : CAAKE, Konrad
Process 4 View / modify family memberships	BEDDOES Judy
Process + view / mouny running memberships	BENNETT Debbie
	BENNETT Steven
Proceed	BERRY Marjorie
	BETTRIDGE Michelle
	Youngest : QAIRK, Kahi
	Eldest : QAIRK, Kahi
	BETTRIDGE Simone
	Youngest : JISEPH, Laura

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.

	ANDERSON Jenni	Miss Kurri GELSENAN
view / modify family memberships		ENDERSON, Jason
Proceed Right-click on a family member to 'cut'		DOLVOS, Evan
and paste them to a new ramity.		MAFUNE, Todd
Right-click on a family title to change the family title.	ige	SIVILLI, Emma
die fainily due.	ANDERSON Kathleen E M	Mr Jam CUUK
		RYIN, Jason
	ANDREW Karen	Mrs Bov NIKI
		MEREME, Caley
	ANDREWS Kellie	Mr Rugun A KEHUKEKE
		STINZIL, Louis
	ANDREWS Nicola	Mr Stovon BONNOTT
		TUUREREWU, Chelsea
		BUKER, Regan
		RIBIN, Kere

Illustration 7 : Students as members of families

To remove a student from a family, right-click on their name and select 'Cut'.

ALSTON Janice J	Mr Illan R OSKIN
	MINRAD, Jennifer
ANDERSON Jenni	Miss Kurri GELSENAN
	ENDERSON Josph
	D Cut
	M Paste
	Sixuela

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				
	LOUGESEN, Conyr				
AHN Heechul	Ms Lynnu UBRUHUM				
	Minute accel:yun				
	NI Cut I				
AHURIRI Trinette	Mrs Paste S				
ALI Farook	Mr Machaal HAALA1				

Illustration 9		Pasting	tho	student	into	а	new	family
mustration 7	٠	газину	uic	Sludent	into	а	11610	ranniy

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 youngests and eldests
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
	ising this utility you must first ensure that the eldest student in each as 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.

musac

Student Manager MUSAC Classic 2014

Before u	ising this utility you must first ensure that the eldest student in each	SUKUNIWU Sheke Mrs	~
	as been identified. (Use 'Family Connections' to do this).	GRINTHIM (DINBY), Leona	
i di iliy ii	us been identified. (ose i dininy connections to do diis).	PURUKA Tenie Ms	
		MUISEY Braan Mr	
Step 1	At the outset, you may wish to remove all existing voting rights from all students.	VEKETINI, Hine	
		CHENG Hai-Mei Mrs	
		TELAGA Tau Mrs	
		BIWLIN, Raukawa	
	Remove Existing Voting Rights	TROANOR Tonio Mrs	
		MATEKOHI Juda Mr	
		STAVANSON, Billie-Jay GRAGORY KillyAnni Mrs	
		KURUUPA Ribin Mrs	
		MOANA, Jordan	
Step 2	When adding rights, you may select from :	McLUAN Muke Mr	
		PETAKA-ESBERNE Rechel Ms	
	 Allocate rights to the first two caregivers for each eldest student 	AHURIRI, Kelly	
	Allocate rights to the hist two caregivers for each eldest student	KIWII Steart Mr	
	Allocate rights to the first five caregivers for each eldest student	FLUNTOFF Soe Mrs	
		HURRIS, Kieran	
	Allocate rights to all caregivers for each eldest student	GARVEN Engelique Mrs	
		GORVON Uan Mr	
		UDY, Lana	
	Proceed to Allocate Rights	BUNNISTER Ungela Miss	
Step 3	Trocced to Allocate Rights	HERTELL Grint Mr	
		MELINEUX, Kendrex	
		KIRIOPA Ngahaku Mr	
		LITT Engrid A Mrs	
		SVANDSAN, Damien	
		? Koren Ms	
		WEITOKIE	
Step 4	Print the Displayed List	HAHEPA, Edward	
		KARKWOOD Kith Mrs	~

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

Student Manager MUSAC Classic 2014

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.

Export Student data
Import Student data

Illustration 13 : The NZSSSC buttons

1 The export facility

New Zealand Secon	idary School Sports Council Exp	ort utility	
Step 1 :			
Select the database From you wish to transfer stud			
CM/SM (The main databa	ase) 🐱		
Step 2 :			
Select the drive To which write the NZSSSC data file d: CM CM CM CM	you wish to		
Backup Backup cmbmps MRemote	⊻		
Step 3 :			
Proceed			

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'.

musac

ep 1 :		The maintime	
Select the database From which	,	Zac	8
you wish to transfer students	÷	Em hchi	
		Jar e	
CM/SM (The main database)	*	Yar	
		Log	
		Tor	
ep 2 :		Sea	
Select the drive To which you w	ich to	Bra	
write the NZSSSC data file	NSIT CO	She	
white the hassist data the		Ad	
∎d	*	Lev Hai achchi	
	1778	Sha	
🔄 D:\	<u>^</u>	The	
CM CM		Hai	
acclogs		ADI	
Backup		Tro	
Cmbmps		Re	
CMRemote		Bet	
Config	~	Ber on	
Comg		Hol	
		Nic	
p3:		Ma t	
		Ma	
Proceed	2	Sky	
		Ge	
		Luk	
NZSSSC data ex	port process complete	Ber	
	have been a second second	Joe	

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 Zea	land 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	Proceed to Import

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 asTTIe. ClassRoom Manager includes the additional ability to import asTTIe results back into the ClassRoom Manager database.

The main export screen is shown below.

D,	asTTle and NZCER Export / Import rout	ines (Version 11.8.12)	Million Conversion	and the local division of the local division	
	This utility will export data relating to Year 12 (v3 and V4) or Years 1 to 13				
	asTTle Version	Ver 5 (2007)	🔘 Ver 4 (2005)	🔘 Ver 3 (2003 / 2004)	🔘 Ver 2 (2002)
	File name and destination	C:\CM\e-asTTle\0123_e	-asTTle.ast		
	Colort at idents to support	Select Students			
	Select students to export				
	Students selected :	Status: Full time,Part tim	e		
				_	
		Proceed	Cancel		

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.

B , <i>I</i>	Asttle Export /	Import	routines						
F	Options () Years Forms ()	Groups	Gender Pla	ace & Ethnicity		chools blumns		Activities Type	Mark Books
	Years Year 9		d Forms	9KA		Selected Gr	oups	Status Full time	
	Year 10 Year 11 Year 12 Year 13	10AS 10ED 10F0 10JS 10MK 11DN 11DV	11RA 12CJ 12MA 12MC 12OA 12TH 12WS	9ML 9NU 9PE 9ST Yr 1 Yr 2 Yr 3		Rm 1 Rm 10 Rm 11 Rm 12 Rm 2 Rm 2 Rm 3 Rm 4		Part time Leaver Pre-enrolment Delete	
		11HP 11M0 11PA 11PK	13AD 13SK 9HG 9HU	Yi 4 Yi 5 Yi 6		Rm 5 Rm 6 Rm 7 Rm 8 Rm 9	~	Reset the filter to just Full and Part time students	
F	F -				Ē	F	F		Proceed

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.



SMUTILITIES
Some students will be omitted because they do not conform to the asTTle requirements. You may print a list of these at the end of the export procedure.
()

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.

Step 1 :		
Select the database FROM which you wish to extract students' data		
CM/SM (The main database)		
Step 2 :		
C:		
Step 3 :		
Full school		
Full school Year level		

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.

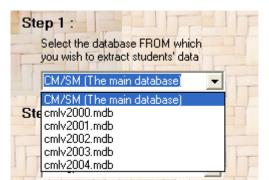


Illustration 21 : The source database selection

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.

1			-
	Yr 9 Year 9	•	TT
	Yr9 Year9		
	Yr10 Year10		
	Yr 11 Year 11		
	Yr 12 Year 12		
	Yr13 Year13		T
	Yr 20 Total		
	Proceed	Cancel	
1		Frank Frank	T

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.

Ministry of Health Student Based Vaccin	nation System Data Extract	
Step 1:		
Step 1 . Select the database FROM which you wish to extract students' data CM/SM (The main database) Step 2 : Select the drive TO which you wish to	TURNER, DAMON HOHEPA TURNER, LYNDAL HINEKURA UDY, CRAIG IVAN VARTHA, JONATHAN DOUGLAS WADE, CHAIG DANIEL WAITE, CHARLOTTE ELIZABETH WALTON, JANET ISOBELL	
write the MOH SBVS data file	WARDLE, JEREMY BERNARD WARREN, JASON ALAN WARREN-KEREH, JIMMY WESTERBY, MICHELLE MARIE WHAKATIHI, SELINA MARIE WHITTLESTON, SONIA PATRICIA WICKENDEN, KATERINA-MARIA WICKINSON, CINDY ANNE	F
Step 3 : • Full School • Year level	WILLIAMS, JULIE MARGARET WILLIAMS, JULIE MARGARET WILLIAMS-ELLIOT, LOUANA MOLLY WILLIS, RANGIMARIE JOSEPH WILSON, VANESSA CATHERINE WILTSHIRE, MARK JOHN WOODLEY, VANESSA KIM WYUE, LINDA MARIE YAP, TANYA DAWN YAP, LEANNE JOY	
Step 4:		
Proceed	File a:\SPF_0123_20040618.csv created - 286 students exported	
Illustration 23 : T	he completed export process	

15.13 View buttons in Utilities - Basic student data

Eamily Utilities	Board Of Trustee	Special Exports /	Manage Students'	View Basic Student
	Elections	Imports	Photos	Data
View the Log File	View the Register	View <u>P</u> df-saved Letters	Email Students' Documents	End-of-year Data Roll-over

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.

	is that contained in the basic ten c	olumns on each student.	You may sort	a column b	y right-click	ing on its
FITI	to reverse the sort order) You may		dragging the g	japs betwee	en the head	ings.
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

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.

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	-	
10.0020000000.01.X7	20100120000	TRADE.	A	1	

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.

20/02/2003 10.11.03	20/02/2003	maach	Enitod	
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	
042002000010.00.40	ne 200 20000	TRADE.	A contract of the second states	Y
<			>	
Search in 2003	 Search fr 	nr accessed util	Search Print (selection)	
		former and proposed		
tr the		1 pr 1 pr		

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.

Date & time	Log Date	User	Detail	
8/02/2004 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 Utilties 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	
1970272004 10:20:34	19/02/2004	MIRAC MIRAC	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.

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udent	Manager view register
-	ent Manager register
- Disp	ay options
C	Display the full register
C	Display just new arrivals
c	Display just those removed from the database
C	Search for a particular family name e.g. Ball or Bal*
œ	Display a particular change
	From Any status
	to Any status
С	Display transactions between :
	Between 01/01/2003
	and 12/03/2003
	Generate display
	- Disp C C C

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.

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.

Student Manager mail viewer				
Select student	Click document to view	Documents o	n file :	F
ABACROMBIE, JIMMY (1)	Document	Time	Date	
				F
F				

Illustration 8 : One student has one document

Selecting the student, his or her letters are displayed on the right hand list, as shown below.

Student Manager mail viewer				
Select student		Click document to view	Documents on fi	ile : 1
ABACROMBIE, JIMMY (1)		Document	Time	Date
	F	Pastoral18062004121323	18/06/2004	12:13

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.

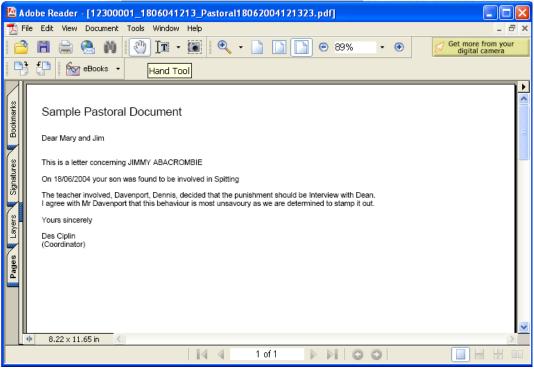


Illustration 10 : The letter home

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 CMAdmin. 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'.



p1 Se	elect the dire	ectory holding the	documents	Step 4	Select the required email message	
F	C:		-		Test 1 Test 2 Test 3	
🔄 c:\						
	skwell					
	 akbov arbish arbran asben 	op hwell			Title	
	📄 bdclea	ator	V			
	ecify the da cuments we	ates between whic ere created	h the		Add a new message	
	Between	19/07/2004			Save changes	
	and	19/07/2004			Delete the selected message	

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.

tep 4 Select the Test 1 Test 2 Test 3	e required email message
Title	Test 1
Message	Kairakau College Midyear Repo
	Add a new message
	Save changes
De	elete the selected 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.

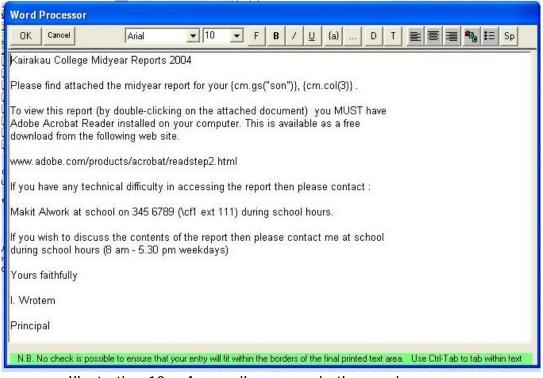


Illustration 13 : An email message in the word processor

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.

Student name	Document	Caregiver	Caregiver email	Reports
BIRD, Jennifer	jbird Junior Interim.pdf	MrBIBD	Carogria and	Toport
BIRD, Jennifer	jbird room.pdf	Mr BIRD		
BIRD, Jennifer	ibird 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	kmbramwell_Junior Interim.pdf	Mr BRAMWELL		
BRAMWELL, KARL	kmbramwell_room.pdf	Mr BRAMWELL		
BRAMWELL, KARL	kmbramwell_Junior Interim.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRAMWELL, KARL	kmbramwell_room.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRIGGS, TRACEY	tmbriggs_room.pdf	Mr BRIGGS		
BRIGGS, TRACEY	tmbriggs_room.pdf	Mrs BRIGGS		
	ANNAL SECTION AND AND AND AND AND AND AND AND AND AN			

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.



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, SANDRA	smbird_room.pdf	Mrs BIHD		
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	kmbramwell_Junior Interim.pdf	Mr BRAMWELL		
BRAMWELL, KARL	kmbramwell_room.pdf	Mr BRAMWELL		
BRAMWELL, KARL	kmbramwell_Junior Interim.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRAMWELL, KARL	kmbramwell_room.pdf	Mrs BRAMWELL	r.h.butler@massey.ac.nz	Yes
BRIGGS, TRACEY	tmbriggs_room.pdf	Mr BRIGGS	and the second	

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



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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.

chool's email address	Transmission report	
admin@kairakau.paradise.nz		
chool's Internet Service Provider g. smtp.paradise.net.nz		
smtp.paradise.net.nz		
Send them		
lease note that the transmission report will not list mails which are undelivered due to unrocognised uilts in email addresses.		

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.aaaa.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.

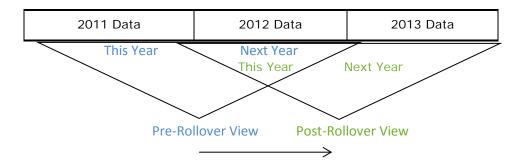
To: Mr BISHOP: To: Mrs BISHOP To: Mrs BODY: s To: Mrs BRAMWI	: sent successfully sent successfully : sent successfully ent successfully ELL : sent successfully	
To : Mrs BRAMWI	ELL . Sent successfully	
	ELL : sent successfully ELL : sent successfully Print failures	Print all

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.



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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.

Data Check Options	×
O Data review report	
This report will list all students who have missing or blank configuration data.	
Missing and blank data report ■	
This report lists students with missing data that is required for Rollover.	
Students with optional blank data may also be included in the report by checking the relevant box below.	
Optional Data -	
Report if next year's year level is blank	
Report if this year's teacher is blank	
Report if next year's teacher is blank	
Report if this year's class is blank	
Report if next year's class is blank	
Report if next year's room is blank	
<u>OK</u> <u>Cancel</u>	

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	Next	Teacherthis year	Teacher Next Year
					Year	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)	n2 (2009)	EC1 (2010)	11	12	l	

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
Adamsi, Jelan		Teacher for this year is blank
		Teacher for next year is blank
B RAKUS, Stephen		Class for 2009 is blank
		Teacher for this year is blank
		Teacher for next year is blank
ORMIER, Rod		Class for 2009 is blank
		Teacher for this year is blank
		Teacher for next year is blank
ACH, Damon		Class for 2009 is blank
		Teacher for this year is blank
		Teacher for next year is blank
IACH, Odie		Class for 2009 is blank
		Teacher for this vear 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 preenrolled 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.

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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.

Select the database From which you wish to transfer students CM/SM (The main database)	Student Manager prepare a Library update disk Student Manager Library update file					
you wish to transfer students (M/SM (The main database) Step 2 : Select the drive To which you wish to write the Library update file C C C C C C C C C C C C C C C	Step 1 :	[
Step 2 : Select the drive To which you wish to write the Library update file C: C: C: C: C: C: C: C: C: C:						
Select the drive To which you wish to write the Library update file C: C: C: C: C: C: C: C: C: C: C: C: C:	CM/SM (The main database)					
write the Library update file C:	Step 2 :					
CA CM acclogs Backup cmbmps CMRemote config Step 3 :						
Step 3 :						
acclogs Backup cmbmps CMRemote config Step 3 :						
Step 3 :	acclogs					
Step 3 :	Cmbmps					
	, -					
Proceed						
	Proceed					

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.



Student Manager prepare a Library update disk Student Manager Library update file	
This utility will create an export file of relevant student data for th	e MUSAC Library manager package.
,	
Step 1 :	KTTTT ishleigh
	A rancesca
Select the database From which	A tefanie L
you wish to transfer students	(atalia He
CM/SM (The main database)	(Ily Anne
CM/SM (The main database)	H idyl Mare
	H A-MART: Wiraj
Step 2 :	H hristine A
Select the drive To which you wish to	N atelyn Lo
write the Library update file	N Sophia N
write the Library update nie	F ON, Kati
🖃 c: 🔹	F N, Taylal
	1 IL, Lalina 5 Isabelle 1
🔄 🔄 C:V 🛛 🔼	1 ibristiana
🔁 solway	1 IN, Olivia
🚔 CM	V EGT, Rac
acclogs	V , Claudia
Backup	V N, Abiga
Combrane Com	(Jamie-Ar
CMBemote	(auren
	H my Brool
	N ST, Lore ennifer
	N shley Ja
ton 2 i	F N, Ashle
tep 3 :	H A, Ariana
Proceed	+ Jatalie El
rioceu	t ura Ellen
	F I, Catrior
	E Felicity
	E Natalie nda
Library data export process complete	(un Lai Ka
	S _ in Young 💙

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.

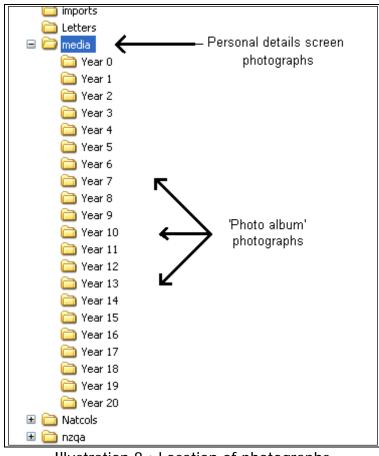
The most time consuming part of the process is the attachment of individual students photographs to their documents.

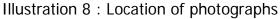
We've added a couple of utilities to try to make this process easier – see Photograph management buttons.

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.





The main screen for the photograph management process is shown below.

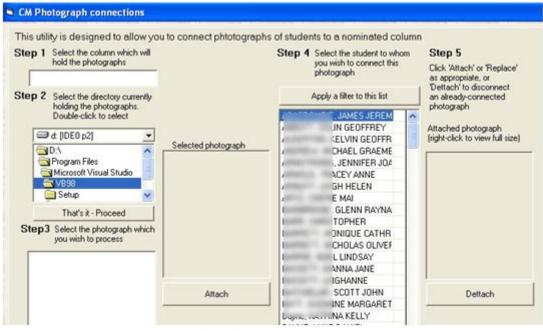


Illustration 9 : The photograph management screen

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.

St	ep 1 Select the column which hold the photographs	ch will
	Page 1 photo	
, v	1 2 3 4 5 Color Postal address 4 Home phone Student's phone Buddy/Mentor Buddy/Mentor (Next year) A.K.A. Address 5 Postal address 5 Page 1 photo Report name Report full name Quick data	umns
	Can	cel

Illustration 10 : The 'Page 1 photo' column

Step 2 - Identify the subdirectory holding the photographs.

Step 2	Select the directory cur holding the photograph Double-click to select	rently s.
a	l c:	-
	Letters	~
	🛛 media	
	🗋 Meetings backup	
	Natcols	
	🗋 nzga	~
	That's it - Proceed	1

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.

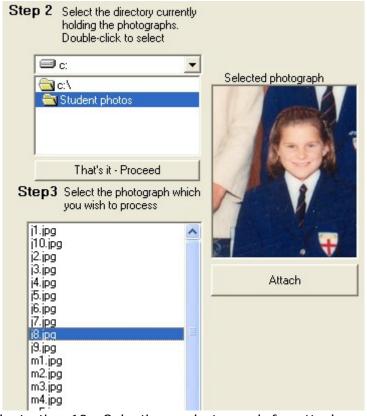


Illustration 12 : Selecting a photograph for attachment

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 'Dettach' 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 ph	Fill a photograph column with photograph names							
intend to	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	Step 2	Specify the filename which you wish to use	Step 4				
	Page 1 Photo		✓	Proceed				
			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					
			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
F	1 2 3 4 5 Columns
F	A.K.A. Iwi 2 Iwi 3 Passport number Address 5 Postal address 5
EF.	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.

Step 2	Specify the filename which you wish to use
	✓
	nnnn.jpg
	nnnn.bmp
	nnnn.wmf
	PCnnnn.jpg
Step 3	PCnnnn.bmp
	PCnnnn.wmf

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.

	Columns	;	Туре
Years Selected Classes Year 7 10LKu Year 8 11ABn Year 9 11MNi Year 10 12PGr Year 12 14CSt Year 13 7JMc Year 14 85Fr 9CHu 9CHu	Selected Rooms 10 11G 11G 11S 12 13 14 7 8 9	Status Full time Leaver Pre-enrolment Delete Reset the filter to just Full and Part time students	

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.

Step 3	IFF
Proceed	
Truttru	I Fr
Process complete	1

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.

M Photograph connectio	ns Copy or Move photographs between columns	
Connect Student Photographs	Student photographs are held in columns which hold the file names of the photographs. This utility allows you group of photographs from one column to another.	to move a
Eill in a Column with Photo Names Move or Copy Photos		Select the students for whom y wish to move or copy photograp Select Students
Service		Selected students :
	N.B. Please ensure that the columns selected here ARE columns which have been uniquely allocated to hold the filenames of photographs.	
	Step 4	Either
		Move the Photos
		Or
		Copy the Photos

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'

Step 1	Select the column which holds the photographs which you wish to move or copy	Step 2	Select the column to which you wish them to be moved or copie	d
	Page 1 Photo 🗸 🗸			*
	N.B. Please ensure that the columr uniquely allocated to hold the filena	ns selected her ames of photog	Year 3 Photo Year 4 Photo Year 5 Photo Year 7 Photo Year 7 Photo Year 8 Photo Year 9 Photo Year 10 Photo Year 11 Photo Year 12 Photo	*

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

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).

musac

Student Manager MUSAC Classic 2014

Iransactions	Process <u>A</u> utopayments	Print any Temporary Lists
	Reports	Global Processes
Print Statements	Print Receipts	Print Credit Notes
Consolidation	Billable Items	Send Batch to Accounts
Design Financial Documents	Einancial Defaults	

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	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.

'All in filter 'Compulso If you sel Numbers 'Ask how	m the list shown ' items will be applied to ry') ect a 'Popup List' then th will be shown in brackets nany' does not require a of the others, the requir	ne choices will be ; ; after Status and a 'Detail'. The billir	offered when yo I Detail for Popu ng routine will asl	ou enter the 'Detai p List entries. Do r k for a number of	il' column. not remove these. items.
					ОК
-	Fig	uro 230. Tho	'Status' evol	anation	

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.

	You have changed either item details or ledger connections. These will also be changed on students' transactions where relevant. This may take some time Please ensure that no-one else is currently accessing the student finance processes while the global search and replace occurs. OK
	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).

Enter cost	
What is the cost of Stationary ?	OK Cancel
0.00	

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.



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.

Select column	Select condition	Select detail
1 2 3 4 5 Columns Student Manager Image: Columns Image: Columns Image: Columns Image: Columns PAT TOSCA Image: Columns Image: Columns Image: Columns Image: Columns Staff Columns Image: Columns Image: Columns Image: Columns Image: Columns Record of Achievement Image: Columns Image: Columns Image: Columns Image: Columns Absence Summary Details NZQA Standards Image: Columns Image: Columns Image: Columns NZQA Standards Image: Columns Image: Columns Image: Columns Image: Columns Internet connection details Image: Columns Image: Columns Image: Columns Image: Columns	= < > begins with contains	
		Proceed Cancel

Figure 234: Specifying a 'Lookup' condition

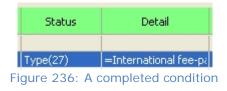
On the left is the MUSAC 'Column picker' via which a selection of any column in the database can be made. In the example, Student Manager/Personal/ Type were clicked to reveal the columns under this category.

In the centre column the '=' sign was selected and from the right hand list 'International Feepaying student'.

Select column	Select condition	Select detail
1 2 3 4 5 Columns This Year Image: Column teach Image: Column teach Image: Column teach Image: Column teach Form Next Year Image: Column teach Image: Column teach Image: Column teach Next Year Image: Column teach Image: Column teach Image: Column teach Image: Column teach Next Year Image: Column teach Image: Column teach Image: Column teach Image: Column teach Sender Image: Column teach Image: Column teach Image: Column teach Image: Column teach Dot Image: Column teach Image: Column teach Image: Column teach Image: Column teach Dot Image: Column teach Image: Column teach Image: Column teach Image: Column teach Date Image: Column teach Image: Column teach Image: Column teach Image: Column teach Date Image: Column teach Image: Column teach Image: Column teach Image: Column teach Date Image: Column teach Image: Column teach Image: Column teach Image: Column teach Date Image: Column teach Image: Column teach Ima	<pre>> begins with contains</pre>	Regular student International fee-paying st International Exchange stu External student Regular Adult student Not attending Returning Adult student Student in Alternative Educ Student at a Kura Teina (D Satellite class student NZAID sponsored student i Teen Parent regular adult : Return. adult att. teen p. t Teen p. elig.+ enrolled reg Proceed Cancel
	0.05 4	

Figure 235: A completed condition

On clicking 'Proceed' the status column will appear as shown below.



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.

Detail - depends on Status All in filter - no detail required Year - enter the relevant 'Year' e.g. 8 Siblings - enter the number of siblings e.g. 0, 1, >1, <3 etc Eldest or Youngest - enter 'Yes' or 'No' Option - enter the relevant option e.g. 12MAT (* = wildcard eg *ART) Column - specify the required detail Ask how many - no detail required	
ОК	

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:

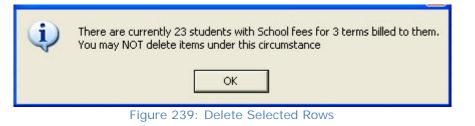


Figure 238: The side bar buttons

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.





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.

?	You have made changes to the Billable items. Are you sure you wish to save these changes
	OK Cancel

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.

(į)	Memorised You will need to 'Save and Exit' if you wish to use this memorised order next time you edit the Billable Items.
	ОК

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.

Zap dates and results	
Important : Please read carefully	
This program will memorise your billable items then cross check your transaction database and your audit trails, and any outstanding MUSAC Accounts files to ensure that item names and matching led numbers are valid.	
Warning : If you have used duplicate item names with different ledger numbers then, if any such it are identified with an unrecognised ledger number then they will be set to the FIRST valid ledger nu found for that item.	
As certain files are recreated and deleted during this process it is necessary to ensure that no others are accessing the student financial processes when you run this utility.	ទ
Any unrecognised items will be added to your list of billable items	
A backup of the various files affected will be made. Once this has been done a button will be made visible which will allow you to restore the backup files.	•
Proceed with checking process or Restore the files backup up on 09/10/2008	
Exit	



16.3 Individual student's transactions

The major part of this screen is devoted to the display of the student's transactions.

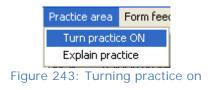


Edit	Links	View O	ptions Aut	omatic payments	Practice ar	ea Form feed receipts									
	Stude	nt :	-				Year : 14	Teach :	13 Form :	13SN					
	Date		Invoice/	Receipt	Detail	(Click in headings to sort)	1	Dr Amount	Cr Amount	Balance	G.S.T. St.	Ledger	Method	Exp
	<														>
	Transa	ction optio	ns		Total	outstanding debt : \$0	00						View status		
				1 1 20	Curren		D.00								Save
	1		<u>Ca</u> C	9.2.3	Defaul	t date : 09/10/2008									Changes
	Dofault	explanation		~	— —										
				×		unter Undo	De-select All						< Previous	Next >	Close
	Payment	method	Cash		V Tran					1 17 1		L			Close

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.



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.

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	H = Teach
School fees for 2 terms	150.00	
School fees - 3 terms 2+	105.00	V = Form
School JH	300.00	S = Sibling count
10ART - Terms 1-2	10.00	5 – Sibiling counc
10ART - Term 3-4	10.00	E = Eldests only
Art Yr 11	30.00	
Art Yr 11 - 3 Terms	23.00	Y = Youngests or
Art Yr 12	30.00	O = Option class
Art Yr 13	30.00	
Art for 3 terms	23.00	L = Popup entry
Art for 2 Terms	15.00	A = Ask how man
Photography Yr 12	30.00	A = ASK HOW HIGH
Photography Materials	120.00	✓
Number of items selected : 1		
De-select All Rememb	er these OK	Cancel

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 Tra	ansaction Co	nfirmation			
Item		Cost			
Testing		33.00			
9ART - Term 1		5.00			
Transaction tota	I	38.00			
Transaction cocc					
This amount is	Paid 💿	Unpaid 🔘			
Either	Print receipt 📀	or don't print 🔘			
Receipt	Receipt-3 per p	page.dmt 💙			
Method	Cash	~			
				Proceed	Cancel
		Figure 2	45: Payment details	S	

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.

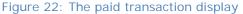
If the item(s) were unpaid they will be displayed on the screen with the amount of the debt showing in the 'Dr Amount' column. The same debit balance will show in the 'Balance' column also. The 'Status' column will display 'N' – not paid (Figure 21).

	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



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



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

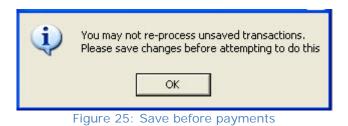
There are four currency columns on the transaction screen:

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	
	a. (

- 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'



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.

Print a	a receipt
Yes	No

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



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 Paymer	nt or Part-paym	ent			
Items paid					
Item	Cost	GST	Ledger		
Testing	33.00	3.67	27		
9ART - Term 1	5.00		02		
	Transacti	on total	38.00		
	Payment	received 38	3.00		
	Payment	balance			
If the payment made covers than the amount due then the surplus will be retained as ar	he Daumant	received	_		
unallocated balance against	item :				
Either Print receipt 🔿	or don't print 💿				
					(food
Method Cash		*		Proceed	Cancel

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 of 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



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	paymen	ts					
You have sele	ected the fo	llowing pai	d items to be re	funded (either in full o	r in part)		
Date	Item			Amount Paid	Refund		
09-Oct-2008	Testing		-	33.00	33.00		
The refund(s)		• been :					
 ● Not paid (○ Paid out 							
	nt credit don't print	● ○	Credit note		~	Proceed	Cancel
			Figu	re 34: Refund N	ot 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	γ
09-Oct-2008	Counter	9ART - Term 1	5.00				Y
09-Oct-2008	6897	Payment received		38.00		3.67	А
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 sele	ected the following paid items to be	e refunded (either in full or ir	n part)		
Date	Item	Amount Paid	Refund		
10/10/2008	Testing	33.00	33.00		
The refund(s)) listed have been :				
O Not paid	out				
📀 Paid out					
Method	Cheque 🕑	Paid by cheque number :			
Either Prin	t Cheque		*		
Or	don't print				
				Proceed	Cancel
		Elevena 24. Defined D			

Figure 36: Refund Paid Out

Date	Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T. 3	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'.

	payments	refunded (either in full or	in north	
Date	ected the following paid items to be Item Payment received	Amount Paid	Refund 100.00	
The refund(s)) listed have been :			
 Paid out 				
Method	Cash 🖌			
	nt credit 🛛 🔿 don't print 💿			
		Elguro 29: Crodit	Proceed	Cancel

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



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).

musac

Confirmatio	on of debt reduction details	•			
Step 1 If ne	cessary, change the amounts in the	right hand column below	٧		
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 Ent	er your explanation for the reductio	n(s)			
e.g Paid on t	ect the process for the reduction				
Disco	unt(s) Exemption(s)				
		ure 41. Deductio			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

J = Payment by Journal



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 b	y journal				
Items paid					
Item	Cost	GST	Ledger		
Testing	33.00	3.67	27		
			22.02		
	Transaction		33.00		
	Payment rec	ceived 33.	00		
	Payment ba	lance			
				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).

Explanati	pn
Transacti	on 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



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	γ
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 de	ebts				
The following	available balances					
Date	Item	Balance avai				
14/10/2008	Payment received	10	0.00			
will be us	ed in payment of :					
Date	Item	Unpaid balance	G.S.T.	Allocate		Sort into Date
14-Oct-2008	3 Testing 2	50.00			50.00	Order
						Sort into Priority
						Order *
* Priority ord	er is the order which debts are to t	e naid via autona	vments	_		
Phoney or a		е раја «на аасора	ymenes			
					Proce	ed Cancel

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. SI
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



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).

(This student has a total credit balance of \$100.00 If you wish to use this for the payment of unpaid items then use the Allocation process (The next button to the left!).
	ОК
	Figure 52: Use of credit balances

Click 'OK' and the following screen will appear (Figure 53).

Confirmation of Payment o	r Part-payme	nt			
Items paid					
Item	Cost	GST	Ledger		
Testing	33.00	3.67	27		
Testing 2	50.00				
	Transaction	n total	83.00		
	Payment re	eceived	3.00		
If the payment made covers mor	Payment b	alance j			
If the payment made covers mor than the amount due then the					
surplus will be retained as an	Payment re	ceived			
unallocated balance against item	:				
Either Print receipt 🔘 or d	on't print 💿				
Method Cash	~	-		Proceed	Cancel
		-			

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

	Edit	Links	View					
	Undo Ctrl+Z							
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

Links View Options Autom								
Configure billable items								
Figure	56:	The Links	s menu					

Links/Configure billable items, is direct access to your Billable items page.

View

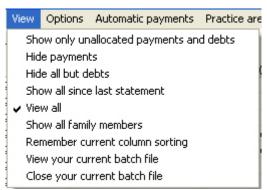


Figure 57: The View menu

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.

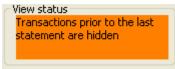


Figure58: View status

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
HICK RYAN	22-Feb-2008	Counter	School JH	200.00	
RYAN	22-Feb-2008	Counter	9ART - Term 1	5.00	
RYAN	22-Feb-2008	6668	Payment received		
RYAN	25-Feb-2008	CN4	Refund		105.00
RYAN	25-Feb-2008	Refund	Refund	105.00	
RYAN	05-Mar-2008	6683	Payment received		236.00
RYAN	31-Mar-2008	6684	Payment received		1000.00
RYAN	08-Apr-2008	12421	Uniform skirt	80.00	
RYAN	08-Apr-2008	12422	Uniform skirt	80.00	
CATHERINE	14-Oct-2008	Counter	Testing	33.00	
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.

HICCHOCH, RYAN 📼	05-Mar-2008	6683	Payment received		236.00	31.00 Cr	
HIGH SCH, RYAN	1-Mar-2008	6684	Payment received		1000.00	1000.00 Cr	
mental acres, CATHERINE	B-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).

٩	Please confirm that you wish to transfer this balance from and the solar, RYAN to and the solar, CATHERINE
	Yes No



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 bath 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

Options	Automatic payments	Practice ar						
Set defaults								
Adjust explanations								
Send to Excel								
Print statement								
Print this student's displayed details								
Eigur	o 62: The Options	monu						

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. Ea	ch user has his or her own default settings.
Receipting defaults	Reduced format receipt printing *
Next receipt no. 6919 No. of copies 0	If you are wishing to use the 40-character receipt printing option (via LPT1 or LPT2) then select the printer type .
Default Receipt TestReceipt 1.dmt	Printer type Dot matrix
Banking list	Activate the autocut feature after each receipt is printed
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	GST number
or on request. Record details of each cheque as received Generate a banking list : at the end of the batch on request *	School's G.S.T. Number N.B. This detail is NOT user-specific, but is common to all
Generate a banking list :	C Opening the cash drawer *
Default Statement *	You may have the cash drawer of No
This is the statement which will be printed should you print a student's	your register automatically opened whenever you process a payment
statement via the 'Options' menu.	C Link to MUSAC Accounts
new.dmt	Generate a file of ledger totals to transfer to MUSAC Accounts
Credit Note defaults *	MUSAC Accounts application code (A - Z)
Next credit note no. CN 17 No. of copies 0	Path to MUSAC Accounts package (e.g. c:\MUSACACC\
Default Credit note	Into which ledger in MUSAC Accounts do you wish to record 'Income in Advance' e.g. 89020.00?
Batch Report defaults *	✓ 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.

Adjust explanations

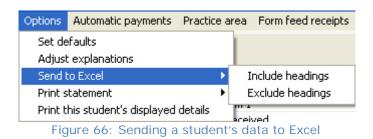
Spec Ed Subsidy			~	
Hardship				
BOT Fin Acct				
Principal Acct				
				I
			U	Insert
			~	
Should the list of possib for this popup be sorted	oilities 1?			
Save		Back		

Figure 64: Adjusting the explanation popup entries

Default explanation	Spec Ed Subsidy	~ 🖸

Figure 65: Pop up default explanation

3 Send 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)



C	exceldump UUU.csv - Microsoft Excel										
	Home	Insert	Page La	yout Fo	rmulas l	Data Re	view Vie	ew Ado	i-Ins		
Ē	Cut		Calibri	* 11	• A A		= %	📑 Wrap	Text	General	*
Pa	ste 🗌	nat Painter	BI	<u>u</u> • 💷 •	🄄 - <u>A</u> -		≣ ≇ ≇	Merg	e & Center 👻	\$ - %	• • • • • • • • • • • • • • • • • • •
	Clipboar	d G		Font	5		Align	ment	ls.	Nur	nber 🖟
	A1	-		<i>f</i> ∗ Date							
	А	В	С	D	E	F	G	Н	1	J	K
1	Date	Inv/Rcpt	Detail	Db amoun	Cr amount	Item balar	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

Options	Automatic payments	Practice a	ea Form feed receipts					
	: explanations		(Click in headings to sort		ear : 12	Teach :	: 11 Dr An	
	:o Excel tatement	•	Current student only		Print trac	ditional stat		
Print this student's displayed details		All family members	×	 Print full statement 				
Figure 68: 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



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 RONE DAN											
Amount Frequency F	rom date L	ast date	Last payment	Allocation	Comment						
20.00 Fortnightly 0)1/01/2008 3	31/12/2008	20.00	Payment received							
Add New	Amount	20.00									
Delete	Frequency	Fortnight	tly 🔽	Or every days							
	From date	01/01/20	08								
Copy Paste	Last date	31/12/20	08								
Update Schedule	Last payme	ent 20.00									
	Allocate to	Payment	received								
	Comment										
	Receipt detail	Auto Pay	ment		iave						

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-pa	ayment 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 - Terms 1-2 10ART - Terms 3-4 Art Yr 11 Art Yr 11 - 3 Terms Art Yr 12 Art Yr 13 Art for 3 terms Art for 3 terms Art for 3 terms Art for 2 Terms Photography Materials 9Performing Arts - Term 2 9Performing Arts - Term 3 9Performing Arts School fees (1)JH 11Performing Arts 12Performing 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).



2	Please confirm that you DO wish to allocate automatic payment(s) prior to today. Do you wish to do so				
	Yes No				

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).

View Schedule	< Previous	Next >	Close	
Figure 74: Details buttons				

Automatic payment schedule for DNE 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





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' (Figure 77).

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		



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).

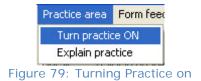
3 Set priority rankings

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 :	Selected items in order of priority					
Testing Testing 2 9ART - Term 1 9ART - Term 2 9ART - Term 2 9ART - Term 3 9ART - Term 4 School (2+)JH School (2+)JH School fees for 2 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 12 Art Yr 13 Art for 3 terms Art for 3 terms Art for 2 Terms Photography Materials 9Performing Arts - Term 2 9Performing Arts - Term 4 10Performing Arts School fees (1)JH	Testing 2 Testing Photography Materials	Move selected item up Move selected item down Delete selected item				



Practice Area



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

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 In	voice number 12450			
Date	Student	Detail	Amount	GST
24/10/2008	ABRAHAM, ASHLEY	Testing	33.00	3.67
Unallocated t	balance : 33.00		Print I	Details
				Close
				Close

Figure 81: Reprinting invoice details



Eg: Receipt details (Figure 82)

Details of Receipt number 6674

	10.0		10.00		1. 2. 21		_
Date	Student		Detail		Amount	GST	
25-Feb-2008	ABRAHAM,	ASHLEY	Payment rec	eived	200.00	0.00	
	Total paym	ent 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 paym	ent allocated			200.00	0.00
				Prir	nt Receipt Pri	nt Details	
				Receipt 1.dmt	*		
						_	
							Close
			=				

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	I				
Paid out by Ca	sh				

Figure 83: Transaction explanation

At the bottom of the screen, three details are displayed (Figure 84):

Total outstanding debt : \$42.30				
Current paymer	nt :\$0.00			
Default date :	24/10/2008			
Figure 84: Current debt position				

- 1. The student's current debt/credit.
- $\label{eq:2.1} \textbf{ 2. The current payment being processed.}$
- 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

Set Financial De	efaults N.B. * These default settings are user-specific.	Each user has his or her own default settings.
 Receipting defaults 		Reduced format receipt printing *
Next receipt no.	6919 No. of copies 0	If you are wishing to use the 40-character receipt printing option (via LPT1 or LPT2) then select the printer type .
Default Receipt	TestReceipt 1.dmt	Printer type Dot matrix
Banking list You may elect to h	ave details of cheques recorded against such payments	Activate the autocut feature after each receipt is printed
and the results of or on request.	such payments listed either at the end of each session	GST number
	of each cheque as received g list : \odot at the end of the batch \bigcirc on request *	School's G.S.T. Number N.B. This detail is NOT user-specific, but is common to all
	g list : ③ at the end of the batch	Opening the cash drawer * You may have the cash drawer of
Default Statement *	nt which will be printed should you print a student's	your register automatically opened whenever you process a payment
statement via the '	Options' menu.	Link to MUSAC Accounts
new.dmt	×	Generate a file of ledger totals to transfer to MUSAC Accounts
Credit Note defaults	×	MUSAC Accounts application code (A - Z)
Next credit note r	o. CN 17 No. of copies 0	Path to MUSAC Accounts package (e.g. c:\MUSACACC\ [:\MUSACACC\
Default Credit not		Into which ledger in MUSAC Accounts do you wish to record 'Income in Advance' e.g. 89020.00?
Batch Report defau Batch Item Ana	ts * Ilysis - Show amounts EXCLUSIVE of GST	✓ Include a FULL listing of all transactions in the link report

Figure 85: The defaults screen

Note: The default settings are user-specific. Each user has his or her, own default settings.

Receipting defaults

Receipting defaults			
Next receipt no.	6920	No. of copies	1
Default Receipt	Receipt 1.dmt		~

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 : \odot at the end of the batch \bigcirc 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	detai	ls
---------------	-----	--------	-------	----

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 	t Statement *	
	the statement which will be printed should you print a student ent via the 'Options' menu.	's
	Statement 1.dmt	

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

Credit Note defaults *			
Next credit note no. CN	17	No. of copies	0 •
Default Credit note	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

Batch Report defaults *	
Batch Item Analysis - Show amounts EXCLUSIVE of GST	

Figure 91: Batch report defaults

This option shows amounts exclusive of GST if ticked.

Reduced format receipt printing

If you are wis	at receipt printing * ning to use the 40-character receipt printing 11 or LPT2) then select the printer type .]
Printer type	Dot matrix	~
Activate th	e autocut feature after each receipt is printe	d
Figure	92: Reduced format receipt printin	ng

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

GST number	
School's G.S.T. Number N.B. This detail is NOT user-specific,	12-345-678
but is common to all	

Figure 93: The school's GST number

The school's GST number.

Opening the cash drawer

You may have the cash drawer of your register automatically opened whenever you process a payment	Opening the cash drawer *		
whenever you process a payment	your register automatically opened	No	~
	whenever you process a payment		

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\	C/
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 t	he 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).

Invoice/Receipt	Detail	(Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T. St.
Counter	Testing		33.00		33.00 Dr	3.67 N

To view the 'Batch Report', Click 'Close' from the transaction page and the following screen will appear (Figure 97).

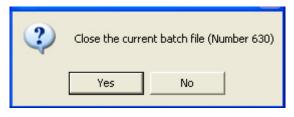


Figure 97: Closing the batch

Click 'Yes' for the following screen (Figure 98).

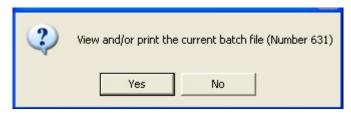


Figure 98: View the batch file

Click 'Yes'. The first page of the Batch report is the list of transactions (Figure 99).

Date	Time	User	Student	t	Teach	Form	Transactio	n
25/10/2008	15:31:29	MUSAC MUSAC	ANGKIRIM	ANG, ELB ERT	10WS	10WS	Contertemu	ipaki
Ite	m	Amount	GST	Ledger	Metho	d	Batch	
Tes	thq	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)
Banking Subtotal	0.00

Non-Banking

Credit card	0.00
MSA	0.00
Mastercard	0.00
EFTPOS	0.00
Automatic payment	0.00
Non-Banking subtotal	0.00

Income subtotal	0.00
-----------------	------

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
Other subtotal	0.00

Figure 100: Transaction totals

The last page is the Item Analysis (Figure 101).



Batch Item Analysis - GST Exclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1										
ltem	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
Ledger total	27							29.33	3.67	29.33	3.67
Grand totals								29.33	3.67	29.33	3.67

Figure 101: The batch report item analysis

This report shows a summary of all the information from the previous pages. Weather 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 tra	neaction paid			

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).

D ate	Time	User		Student		Teach		Form	Tra	Transaction	
27/10/2008	18:01:32	MUSAC	MUSAC	ARAHOVITIS, A	12	12 12PE		Counter them paid immediate			
	Item		Amount	GST	Ledger		Met	hod		Batch	
	Testing 2		50.00) 0			Casi			632	

Cheque	0.00
Cash	50.00
Refunds paid in cash	(0.00)
Banking Subtotal	50.00

Figure 104: Transaction totals Paid



Batch Item Analysis - GST Exclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1	50.00				50.00					
ltem	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	
Ledger total		50.00								50.00	
Grand totals		50.00								50.00	

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).

D ate	Time	User		Student		Teacl	h Form	Tra	Transaction	
27/10/2008	18:56:16	MUSAC	MUSAC	ANGKIRIWANG	, ELB ERT	10WS	10WS	P ayment u la doubl		e click
П	Item		Amount	nt GST Ledger			Method		Batch	
1	Testing		33.00	0 3.67 27		Cast			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 Paym	ent or Part-payment			
Items paid				
Item	Cost	GST Ledger		
Testing 2	50.00			
	Transaction tot	al 50.00		
	Payment receiv	/ed 50.00		
If the payment made cov	Payment balan ers more	ce		
than the amount due the	n the Reumant reactiv	/ed		
surplus will be retained a: unallocated balance agair	san			
) or don't print 🔿			
Eicher Philoreceipt 💽				
Receipt Rece	eipt 1.dmt 🛛 🔽			
Method Casl	ו 🗸		Proceed	Cancel

Figure 107: The confirmation settings

Click 'Proceed' to return to the transaction screen, and the payment leg has now been added (Figure 108).

Invoice/Receipt	Detail (Click in headings to sort)	Dr Amount	Cr Amount	Balance	G.S.T. St.
Counter	Testing 2	50.00			Y
6923	Payment received		50.00		A
Ī	Counter	Counter Testing 2	Counter Testing 2 50.00	Counter Testing 2 50.00	Counter Testing 2 50.00

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	Tran	saction	
27/10/2008	19:37:19	MUSAC	MUSAC	ANDREWS, TY	RONE	10JH	10,11	Fullpa	ayme i t ula o	onter
]	ltem		Amount	GST	Ledger	I	Method		Batch	
	Testing 2		50.00	0.00		0	asi		535	

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 F	Part-payment				
Items paid					
Item	Cost	GST	Ledger		
Testing	33.00	3.67	27		
	Transaction to		33.00		
	Transaction to				
	Payment receiv	ved 10.0	00		
	Payment balan	ice	23.00 Dr		
If the payment made covers more than the amount due then the					
surplus will be retained as an	Payment receiv	/ed			
unallocated balance against item :					
Either Print receipt 💽 or don'	't print 🔘				
Receipt Receipt 1.dmt	~				
Method Cash	~			Proceed	Cancel

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										

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		Teac	Teach Form		Transaction		
27/10/2008	19:59:38	MUSAC MUS	SAC /	ARMSTRONG, GILLIAN		13		13SM	Part	Partpaymentula cour	
I	Item		Amount GST Ledger		Ledger	Method		hod		Batch	
T	Testing		10.00	1.11 27		Cast			638		

Figure 112: The batch report transaction list



Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1	10.00	1.11			10.00	1.11				
ltem	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)		
Ledger total	27	10.00	1.11					(10.00)	(1.11)		
Grand totals		10.00	1.11					(10.00)	(1.11)		

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 F	ayment or Pa	rt-payment			
Items paid					
Item		Cost GST	Ledger		
		Transaction total	0.00		
		Payment received	20.00		
		Payment balance	20.00 Cr		
If the payment mac than the amount du					
surplus will be retain	ned as an	Payment received			
unallocated balance Either Print rece		viet 🔿			
Either Print rece	ipt 💿 or don't p	rinc 🔘			
Receipt	Receipt 1.dmt	~			
				Proceed	Cancel
Method	Cash	~		Proceed	Cancer

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										

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).

D ate	Time	User		Student		Teac	:h	Form	Tra	Transaction		
27/10/2008	20:13:58	MUSAC	MUSAC	ARROW, DAVI	D	10JH		100 H	Adva	Advance payment		
i	Item		Amount	GST	Ledger		Met	hod		Batch		
	Payment received		20.00		1		Cast			639		

Figure 115: The batch report transaction list

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1			20.00		20.00					
ltem	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Ledger total								20.00			
Grand totals											

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 P	ayment or Pa	rt-payment								
Items paid										
Item		Cost	GST	1	.edger					
Testing		33.00	3.67		27					
		Transaction to	ital		33.00					
		Payment rece	ved	50.00						
		Payment bala	nce	· ·	7.00 Cr					
If the payment mad than the amount du										
surplus will be retain	ned as an	Payment recei	ved							
unallocated balance										
Either Print recei	pt 💿 or don't p	orint 🔘								
Receipt	Receipt 1.dmt	*				_		_	_	
Method	Cash	*					Proceed			ancel

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	3.67 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	Tra	nsaction	
27/10/2008	20:44:55	MUSAC	MUSAC	ARTHUR, STOP	ME	10JH	10JH	Fully	xayme et u la o	onter
27/10/2008	20:44:55	MUSAC	MUSAC	ARTHUR, STOP	ME	10JH	10JH	Adva	nce payment	via co unter
										1
	Item		Amount	GST	Ledger	Me	thod		Batch	

Ι	Testing	33.00	3.67	27	Cash	642
	Payme it is ceived	17.00		1	Casi	642
_						

Figure 119: The batch report transaction list

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.		
Payment received	1	33.00	3.67	17.00		50.00	3.67		
ltem	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G.S.T.	Refunded	G.S.T.	Unpaid	G.S

ltem	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)		
Ledger total	27	33.00	3.67					(33.00)	(3.67)		
Grand totals		33.00	3.67					(33.00)	(3.67)		

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).

Refun	d of paymen	ts					
You hav	e selected the fo	llowing pa	id items to be re	efunded (either in full o	r in part)		
Date	Item			Amount Paid	Refund		
27-Oct-	2008 Testing 2			50.00	50.00		
-1 -	17 N.N. 1						
	ind(s) listed have	been:					
 Not 	paid out						
O Paid	out						
Either	Print credit	\odot	Credit note	Credit note 1.dmt	~		
	Or don't print	\circ					
						Proceed	Cancel
			E Laurana a	101 The second	a catala a catala.		

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
	γ			
	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	ime User Student		Student		Teac	h Form	Transaction	
27/10/2008	21:25:35	MUSAC	MUSAC	ARAHOVITIS, A	ALEXIA 12		12PE	Refund not paid out	
1	ltem		Amount	GST	Ledger		Method		Batch
	Testing 2		50.00	0.00					643

Figure 123: The batch report transaction list

Other

	1
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
Other subtotal	50.00

Figure 124: The transaction totals

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1	(50.00)		50.00							
ltem	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					
Ledger total		(50.00)				50.00					
Grand totals		(50.00)				50.00					

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 recorded)/whether a credit note is be printed or not/Click Proceed (Figure 126).

Refund of	payments				
You have sele	cted the following paid items to b	e refunded (either in full or in	n part)		
Date	Item	Amount Paid	Refund		
27-Oct-2008	Testing	33.00	33.00		
	200120 12				
The refund(s)	listed have been :				
🔘 Not paid o	out				
Paid out					
Method	Cheque 🗸	Paid by cheque number :	123456		
	t credit 🔿				
Oro	don't print 💿				
			Pro	ceed	Cancel
	E1	a 10/. The confirm			

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	γ	27		
3.67	A	1	Cash	
	A	1	Refund	Paid out by cheque number : 123456
3.67	γ	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		Teac	h	Form	Tra	nsaction
27/10/2008	22:38:58	MUSAC	MUSAC	ATKINS-DICKS	ON, DOMINIC	12		12MK	Rett	id paid out
]	ltem		Amount	GST	Ledger		Met	nod		Batch
	Testing		33.00	3.67	27		Cast			646

Figure 128: The batch report transaction list

Banking

Cheque	0.00
Cash	0.00
Refunds paid in cash	(33.00)
Banking Subtotal	(33.00)

Figure 129: Batch report banking

Batch item analysis

ltem	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	1	1 (100.00)		(11.11)			(11.11)
Item	Ledger	Paid	G.S.T.	Disc/Exmt/Cred	G.S.T.	Refunded	G.S.T.
Testitem	0275	(100.00)	(11.11)	3)		100.00	11.11
Item 2	0275						
Item 3	0276						
Granditotals		(100.00)	(11.11)	2		100.00	11.11

ltem	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testitem	5			8
Item 2				
Item 3				20 22
Granditotals	3			5

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 sele	ected the following paid items	s to be refunded (either in full o	r in part)		
Date	Item	Amount Paid	Refund		
27-Oct-2008	Payment received	20.00	20.00		
-	P. 11 1				
The refund(s)	listed have been :				
O Not paid (out				
💿 Paid out					
Method	Cheque	V Paid by cheque number	: 123456		
				_	
		dit note Credit note 1.dmt	×		
Or	don't print 🔘				
			Pi	oceed	Cancel

Figure 131: The confirmation settings

The student's screen appears as shown (Figure 132).

Date	Invoice	e/Receipt D	Detail	(Click in headings to sort)		Dr Amount	Cr Amount
10-Oct-2008	6902	F	Payment received			100.00	
10-Oct-2008	Refund	j P	Refund			100.00	
:	Balance	G.S.T	. St.	Ledger	Method	Exp	
I			А		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	Studer	nt	Teach	Form	Transact	ion
27/10/2008	22.38.58	MUSAC MUSAC	ATKINS-	DICKSON, DOMINIC	12	12MK	Refund paid	oıt
lter	n	Amou	nt GST	Ledger	Metho	cl	Batch	1
Test	ha	33	00 3.67	27	Cast		646	1

Figure 133: The batch report transaction list

Banking

Cheque	0.00
Cash	0.00
Refunds paid in cash	(33.00)
Banking Subtotal	(33.00)

Figure 134: The transaction totals

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1	(33.00)	(3.67)			(33.00)	(3.67)				
ltem	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				
Ledger total	27	(33.00)	(3.67)			33.00	3.67				
Grand totals		(33.00)	(3.67)			33.00	3.67				

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	E.	
Step 1 If necessary, change the amounts in the	right hand column belo	W
Date Item 02-Nov-2008 Testing 2	Balance due 50.00	Reduction Percent 25.00 50
Step 2 Enter your explanation for the reductio	n(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	Det	ail (C	lick in headings to sort)		Dr Amount	Cr Amount
02-Nov-2008	Counter	Tes	ting 2			50.00	
02-Nov-2008	Note	Tes	ting 2				25.00
:	Balance	G.S.T.	St.	Ledger	Method	Exp	
	25.00 Dr		N				
1			A		Discount	Paid o	n 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	Studen	t	Teach	Form	Transactio
02/11/2008	21:13:49	MUSAC MUSAC	AUGUSTO	RAFAEL	12	120 K	Discount
lte	n	Amount	GST	Ledger	Meth	od	Batch
Test	ting 2	25.00	0.00		DECOU	t	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
Other subtotal	25.00

Figure 136: The transaction totals

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1										
ltem	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)			
Ledger total				25.00				(25.00)			
Grand totals				25.00				(25.00)			

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 b	y journal			
Items paid				
Item	Cost GST			
Testing	33.00 3.67	27		
	Transaction total	33.00		
	Payment received	33.00		
	Payment balance			
			Proceed	Cancel

Figure 138: The confirmation settings

Explanatio	n
Transactic	on explanation
Select ?	Principal Acct
Slush Fur	nd
	Cancel Proceed

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 Amo	ount C	r Amount
02-Nov-2008	Counter	Testin	ng			33	3.00	
02-Nov-2008	Journal001	Paym	ent received					33.00
	Balance	G.S.T.	St.	Ledger	Metho	1 I	Ехр	
		3.67	Y	27				
		3.67	J	1	Journa	ıl	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	Use	ar 🛛	Student		Tea	ach	Form	Τ	ransa ctio	n
02/11/2008	21:36:12	MUS/	AC MUSAC	BACH, DAVI	D	11		1 1SC	F	lipaymentul	aconter
lte	em		Amount	GST	Ledger		Metho	d		Batch	
Te	sting		33.00	3.67	27		Jou n al			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
Other subtotal	33.00

Figure 142: The transaction totals

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1	33.00	3.67			33.00	3.67				
	· · · · · · · · · · · · · · · · · · ·										
ltem	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)		
Ledger total	27	33.00	3.67					(33.00)	(3.67)		
Grand totals		33.00	3.67					(33.00)	(3.67)		

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 (Detail (Click in headings to sort)			Dr Amount	Cr Amount
05-Nov-2008	6934	Payment rec	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 de	ebts				
The following	available balances					
Date	Item	Balance ava				
05-Nov-2008	Payment received	Ę	50.00			
will be us	ed in payment of :					
Date	Item	Unpaid balance		Allocate		Sort into Date
05-Nov-200	E Testing 2	50.00			50.00	Order
						Sort into Priority Order *
* Priority ord	er is the order which debts are to l	oe paid via autopa	yments			
					Proce	ed Cancel

Figure 145: The confirmation settings



Click 'Proceed' and the transaction will show as below (Figure 146):

Date	Invoice/Receipt	Detail	(Click in h	eadings to sort)		Dr Amo	unt	Cr Amount
05-Nov-2008	6934	Payment re	ceived					50.00
05-Nov-2008	Counter	Testing 2				50	.00	
	Balance	G.S.T.	St.	Ledger		Method		
			A		1	Cash		
	5		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	ltem
05/11/2008	11:57:27	MUSAC MUSAC	BAE, JOON	12	12GS	Counter them unpakt	Testing 2
05/11/2008	13:32:41	MUSAC MUSAC	BAE, JOON	12	12GS	Playment via allocation	Testing 2
	•	Amount	GST Ledger	Methor		Batch	

Amount	GST	Ledger	Method	Batch
50.00	0			654
50.00	0.00		via a liocation	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
Other subtotal	50.00

Figure 148: The transaction totals

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1	50.00		(50.00)							
ltem	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	
Ledger total		50.00								50.00	
Grand totals		50.00								50.00	

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 o	of all outstand	ding items			
Items paid					
Item	Cost	GST	Ledger		
Testing	33.00	3.67	27		
Testing 2	50.00				
	Transactio	on total	83.00		
	Payment i	received	3.00		
	Payment I	balance			
If the payment made covers mor					
than the amount due then the surplus will be retained as an	Payment r	eceived			
unallocated balance against item	a î				
Either Print receipt 📀 or d	lon't print 🔘				
Receipt Receipt 1.d	mt	~			
Method Cash	ŀ	~		Proceed	Cancel

Figure 151: The confirmation settings

After clicking 'Proceed' the student's page will show as below (Figure 152).

Date	Invo	oice/Receipt	Detail	(Click in he	adings to sort)		Dr Amo	unt	Cr Amount
05-Nov-2008	Cou	nter	Testing			33.00			
05-Nov-2008	Cou	nter	Testing 2	Testing 2				.00	
05-Nov-2008	693	5	Payment re	eceived					83.00
		Balance	G.S.T	. St.	Ledger		Method		
			3.6	7 Y		27			
				Y					
			3.6	7 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	l	Jser	Stude	nt	Tea	ach	Form	Transact	tion	ltem
05/11/2008	14:20:58	1	MUSAC MUSAC	BAGLEY	SOLOMON	11		11CY	Full payme r	tula co unter	Testing
05/11/2008	14:20:58	1	MUSAC MUSAC	BAGLEY	SOLOMON	11		11CY	Full paymen	tula co unter	Testing 2
			Amount	GST	Ledger	M	ethod		Batch		
			33.00	3.67	27	Ca	8) (3)		656		

Figure 153: The batch report transaction list

Cast

656

Banking

0.00

50.00

Cheque	0.00
Cash	83.00
Refunds paid in cash	(0.00)
Banking Subtotal	83.00

Figure 154: The transaction totals

Batch item analysis

ltem	Ledger	Allocated	G.S.T.	Unallocated	G.S.T.	Total	G.S.T.
Payment received	. 1	170.00	15.55		2	170.00	15.55
Item	Ledger	Paid	G.S.T.	Disc/Exmt/Cred	G.S.T.	Refunded	G.S.T.
Testitem	0275	100.00	11.11	2			
Item 2	0276	40.00	4.44				
Item 3	0277	30.00					
Grand totals	2 50 MART	170.00	15.55				

ltem	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Testitem	(100.00)	(11.11)		
Item 2	(40.00)	(4.44)		
Item 3	(30.00)			8
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 (C	lick in headin	igs to sort)		Dr Amou	unt
12-Oct-	2008	7067	Payment rece	eived				
26-Oct-	2008	7068	Payment rece	eived				
09-Nov-	-2008	7069	Payment rece	eived				
	Cr Amount	Balance	G.S.T.	St.	Ledger	Me	thod	
	20.00	20.00 Cr		U		1 Aut	omatic paymen	
	20.00	20.00 Cr		U		1 Aut	omatic paymen	
	20.00	20.00 Cr		U		1 Aut	omatic 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	Stud	lent		Teach	Form	Transaction
14/11/2008	10:04:31	MUSAC MUSA	C BAKE	R, DOUG		10JH	100.11	Advance vla autopayment
14/11/2008	10:04:31	MUSAC MUSA	C BAKE	R, DOUG		10JH	100 H	Advance via autopayment
14/11/2008	10:04:31	MUSAC MUSA	C BAKE	R, DOUG		10JH	10JH	Advance via autopayment
	Item		Amount	GST	Ledge	ſ	Method	
	Payme et	re ce tve d	20.00		1		At tom atterp	ayment
	Payme et	re de live d	20.00		1		At tom atterp	ayment
	Paryme at	ie de live d	20.00		1		At tom attic p	a/meit

Figure 157: The batch report transaction list

Non-Banking

Credit card	0.00
MSA	0.00
Mastercard	0.00
EFTPOS	0.00
Automatic payment	60.00
Non-Banking subtotal	60.00

Figure 158: The transaction totals

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1			60.00		60.00					
ltem	Ledger	Paid	G.S.T.	Disc/Exmt /Cred	G. S.T .	Refunded	G.S.T.	Unpaid	G.S.T.	Total Invoiced	G.S.T.
Ledger total								60.00			
Grand totals											

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 receipted 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 B	alance
14-Nov-2008	12456	Testing	33.00	33	3.00 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	1308	G lobal involcing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, JESS	13	1308	G lobal invoicing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, MELISSA	11	1100	G lobal involcing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, MELISSA	11	1100	G lobal involcing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, MIKE	12	120 N	G lobal involcing
14/11/2008	10:27:25	MUSAC MUSAC	BAKER, MIKE	12	120 N	G lobal involcing

Item	Amount	GST	Ledger	Method
Testing	33.00	3.67	27	Global Invoicing
Testing 2	50.00	0.00		Global hvolcing
Testing	33.00	3.67	27	Giobal huoloing
Testing 2	50.00	0.00		Global hvolch g
Testing	33.00	3.67	27	Global huoloing
Testing 2	50.00	0.00		Global Invoicing

Figure 161: The batch report transaction list

Batch Item Analysis - GST Inclusive

ltem	Ledger	Allocated	G.S.T.	Unallocat ed	G.S.T.	Total.	G.S.T.				
Payment received	1										
ltem	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	
Ledger total								150.00		150.00	
Testing	27							99.00	11.01	99.00	11.01
Ledger total	27							99.00	11.01	99.00	11.01
Grand totals								249.00	11.01	249.00	11.01

Figure 162: The batch report item analysis

18 Financial Utilities

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



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).

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Student Manager MUSAC Classic 2014

Date	Student	Amount	Item	Receipt detail	Step 1 Specify the two	n dates
12/10/2008	BAMFORD, JOSH	20.00	Payment received	AP		
26/10/2008	BAMFORD, JOSH	20.00	Payment received	AP	Process autopayments due between	01/01/2008
9/11/2008	BAMFORD, JOSH	20.00	Payment received	AP	dde between	
12/10/2008	BARAGWANATH, MACK	15.00	Payment received	AP	and	14/11/2008
26/10/2008	BARAGWANATH, MACK	15.00	Payment received	AP		
9/11/2008	BARAGWANATH, MACK	15.00	Payment received	AP	Then click	List Payments
12/10/2008	BARBER, MILTON	10.00	Payment received	AP		
26/10/2008	BARBER, MILTON	10.00	Payment received	AP		Print this List
9/11/2008	BARBER, MILTON	10.00	Payment received	AP		
12/10/2008	BARNHILL, BRETT	5.00	Payment received	AP	Step 2 Make adjustm	ents to the list as nece
26/10/2008	BARNHILL, BRETT	5.00	Payment received	AP		
9/11/2008	BARNHILL, BRETT	5.00	Payment received	AP	Adjust the amounts being	g received
					Or highlight payments to be postponed and click Or reverse cancellations.	Postpone Reinstate
					••••••••••••••••	l click to multi-select)
					Step 3 Receipting det	ails
					 Don't print receip 	t, rec no, issued
					O Print receipts	Receipt 1.dmt

Figure 164: The auto-payment processing screen

?	You have postponed some payments Do you wish to make these permanent cancellations
	Yes No

Figure 165: Postpone cancellation

		ayment. The items should be selected in pric	prity order.
elect items from :		Selected items in order of priority	
Testing	~	Testing 2	
Testing 2		Testing	
9ART - Term 1	=	Photography Materials	
BART - Term 2			Move selected item up
BART -Term 3			
BART - Term 4			
School (2+)JH			Move selected item dow
School fees for 3 terms			
School fees for 2 terms			
School fees - 3 terms 2+ School JH			
10ART - Terms 1-2			Delete selected item
10ART - Term 3-4			Delete selected item
Art Yr 11			
Art Yr 11 - 3 Terms			
Art Yr 12			
Art Yr 13			
Art for 3 terms			
Art for 2 Terms			
hotography Yr 12			
Photography Materials			
Performing Arts			
3Performing Arts - Term 2			
3Performing Arts - Term 3			
9Performing Arts - Term 4			
10Performing Arts			Save
School fees (1)JH	~		

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 of 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
--------	-----------	--------------

Detail	Cost	Status	Criteria	~	C L L	
Testing	33.00	All students			Status	Criteria
Testing 2	50.00	All students		_	All students	No criteria. Items will b
9ART - Term 1	5.00	0	9ART			applied to all students
9ART - Term 2	5.00	0	9ART			in the current filter
9ART -Term 3	5.00	0	9ART		Y = Year	Year sought
9ART - Term 4	5.00	0	9ART		i — icai	rear sought
School (2+)JH	200.00	S	>3		H = Teach	Class sought
School fees for 3 terms	100.00	S	>1			
School fees for 2 terms	150.00	S	<2		V = Form	Group sought
School fees - 3 terms 2+	105.00	S	>1		S = Sibling count	e.g. 1 or >2
School JH	300.00	S	2		5 – Sibiling counc	0.g. 10/ 22
10ART - Terms 1-2	10.00	0	10ART		E = Eldests only	Y or N
10ART - Term 3-4	10.00	0	10ART			
Art Yr 11	30.00	0	11ART		Y = Youngests only	Y or N
Art Yr 11 - 3 Terms	23.00	0	11ART		O = Option class	e.g. 12MAT
Art Yr 12	30.00	0	12ART			
Art Yr 13	30.00	0	13ART		L = Popup entry	Requested entry
Art for 3 terms	23.00	0	ART		A = Ask how many	No criteria. Number wil
Art for 2 Terms	15.00	0	ART	~	A - ASK HOW HIGHY	be requested
<			3	>		
Number of items selected : 0	hese					

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.

tep 3 Selection of the students	Student	Year	Teach	Form
	CONTRACTOR OF A CONTRACTOR	12	11	11SF
Chudacha is the summer (then (the sur	101/10101 - 101/07/04	10	10JH	10JH
 Students in the current filter (shown) 	101100331 (101032-00)	12	11	11LS
You may select individual students from those listed	STATISTICS. STATES	14	13	135N
The for the later we	STRUCTURE - FOREING	12	11	11MP
Filter for just eldests only	STREET / STREET PROPERTY	13	12	12PE
Apply further restrictions to the current filter	STREET, STREET,	13	12	12BR
	(8110810) (8810)	13	12	12SP
	Chamber of the second s	11	10VR	10VR
	Calendaria (C. Barrishille)	13	12	12BD
	B. HINNEY - BUILDING	14	13	13KN
	101070	10	10JH	10JH
	COLUMN CONTRACTOR	12	11	11KL
	The rest of the second	14	13	135N
	and the second s	11	10HD	10HD
	THE CONTRACTOR AND A REPORT OF	13	12	12BD
	101-1010-10000-1	10	10JH	10JH
	(21)-(-11)-(-000 0100)	12	11	11PC
	(21(-141))	10	10JH	10JH
N.B. Only students who are members of your	(B2(20)) (00 B2)	12	11	11CY
N.R. Only students who are members of your	COPPOSITION CONTRACTOR	12	11	11KL
current filter will be displayed.	TI-	14	13	13BT
	COLUMN THE PARTY OF THE PARTY	13	12	12PE
Remember that to select more than one student	CONTRACTOR (CONTRACTOR)	13	12	120N
either click and drag or hold down Ctrl and click	and the second s	11	10KG	10KG
	and a second to the second	11	10HD	10HD
Calaat All	and the second of the second s	14	13	13GR
Select All	and an	12	11	11LW
	COMPANY AND A CONTRACT OF A CO	10	10JH	10JH

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 chooses 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 decision	s	
Number of copies Number of first invoice Other restrictions Pause after printing every (No entry means no pauses)	No copies 12459 None 50 documents student debts which will involve :	ASHLEY Testing (33.00) Testing 2 (50.00) , SOPHIE Testing (33.00) Testing 2 (50.00) , FREYA Testing (33.00) Testing 2 (50.00)
Up to 2 items will be inv	oiced to each student Proceed	

Figure 171: Final confirmation before printing invoices

18.4 Printing reports



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.

Deposit List
Debtor Lists
Item Summary
Ledger Summaries
Exemptions and Discounts
Transaction Search

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).

Deposit list options		
Sort on Pupil name Ledger number Receipt number Date	Print All deposits Between two receipt numbers	
 Print by All students Selected students All by year level All by Teach All by Form 	 Between two dates Include All items Selected items Selected ledger groups Unallocated credits 	
Include Full time students Part time students Pre-enrolments Leavers	Print Full list (list paid items) Short list (list payments) Payment method Cheque Eftpos	
Include	Credit card Journal Visa Other Mastercard Refunds	Generate Report

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.

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Selection of students		
Select those students whom you wish to include in the requested process. (hold Ctrl to multi-select)		
Apply a Filter to Students	1978) / 1994 - 1999 1975 - 1995 - 1997	
Select All		
Generate Report	101107	

Figure 175: The selection of students

Once all chooses 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	Receipt Method Item		Amount	Total
100010100,/0001011	11 11 SF 01/01		01/01/2008	6936	Automatic payment	Unallocated payment balance	10.00	
			15/01/2008	6937	Automatic payment	Unallocated payment balance	10.00	
29/		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	
			200000	CC75	Chaqua	Stationary list	E4 90	

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).

Debtor list options		
List type Simple list List with user selections Unallocated credits	Include • All items • Selected items • Selected ledger groups	
List those who have Not paid (i.e. debtors) Paid Paid or not paid Been exempted Paid, not paid or exempted Debit balances Credit balances	Print by All students in current filter Selected students All in filter by year level All in filter by Teach All in filter by Form Print debts incurred between 01/01/2008 and 31/12/2008	
Unallocated credits	List details Print students' subtotals only Print details of debts Print details (including phone)	
Include Full time students Part time students Pre-enrolments Leavers		Generate Report

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
- STATE OF CONTRACTOR	11	11SF	699.20	(816.20)	(117.00)
1011001-1010100	10JH	10JH	404.00	(765.00)	(361.00)
december of the state	11	11LS	1,204.00	(430.00)	774.00
STATES AND A STATE AND A	13	13SN	821.00	(1,855.00)	(1,034.00)
STREET, STREET,	11	11MP	321.00	(105.00)	216.00
CONTRACTOR AND A CONTRACT	12	12P E	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
O Simple List for Students in the Current Filter
List order
 Item list order Alphabetical order
Show
 Percentage paid
O Percentage unpaid
Gst inc / exc
O Gst inclusive amounts
Ost exclusive amounts
Budget options
* Budget options are only
available if amounts are Gst exclusive
 Include budget details
O Exclude budget details
Generate Report

Figure 179: The Item summary settings

An example of this list is shown below (Figure 180).

MUSAC Demonstration 03/03/2008

ltem list

N.B. Amounts are EXCLUSIVE of G.S.T.

Item	Ledger	Allocated	G.S.T.	Unalloc ated	G.S.T.	Total	G.S.T.	% Alld	Budget	Balance	% Inv	% Recd
Paym ent received	1	42278.15	(88.71)	61 02.23		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. % P
School fees (1)JH	01	8068.00		175.00				18422.0	0	26490.00)	30
School (2+)JH	01	2210.00						6480.0	10	8690.00	5	25
School fees for 3 terms	01	265.55		60.00				1434.4	15	1700.00)	15
School fees for 2 terms	01	150.00		40.00				1150.0	0	1300.00	5	11

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).

 Include budget details Exclude budget details Exclude budget details Exclude budget details Print transactions All transactions Between two dates 	Report type Simple summary Summary with user options Analyse by Ledger subgroup Ledger Ledger group Report Each individual item N/A	Gst inc / exc Gst inclusive amounts Gst exclusive amounts Show gst columns Include gst columns Exclude gst columns Budget options * Budget options are only available if amounts are Gst exclusive
	Include Only those with subgroups N/A Show Percentage paid Percentage unpaid	Exclude budget details Print transactions All transactions

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
	Ledger 01		8.690.00	(800.00)	7.890.00	2.070.55	5.819.45

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).

List	
Exemptions	
Discounts	
Include	
 All items 	
◯ Selected items	
Ledger summary	
🔲 Include ledger summ	nary
Generate Repor	t

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, FRE YA	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	108G	10RA	11/08/2008	Note	Exemption	Uniform tie	20.00	20.00

Totals

Total exemptions	450.00	
Total discounts	66.50	
Grand total		516.50

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			mn headings to s ling / descendin	
Year	r	No.	Date Opened	~
2008		626	25/10/2008	
Teshula		627	24/10/2008	
Include		628	25/10/2008	
 All transactions 		629	26/10/2008	
Between two dates		630	26/10/2008	
O between two dates		631	26/10/2008	
01/01/2008 26/10/2008		632	27/10/2008	
		633	27/10/2008	
Batch number 657		634	27/10/2008	
Batch item analysis is gst		635	27/10/2008	
excl.		636	27/10/2008	
Your current batch file is available		637	27/10/2008	
via the last option above.		638	27/10/2008	
		639	27/10/2008	
		640	27/10/2008	
			27/10/2008	
		<		2
	c	losed a ba	u have inadverte itch without crea i then it will not b	ting
Generate Report				

Figure 185: Transaction search

18.5 Printing temporary lists



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 availab	le for printing	Offer these printing form options at the end of every batch
The list of items invoiced Items invoiced on 24/10/2008 at 8:17:12 a.m.	First entry on file	
Number of entries in file : 97		Print this file
The banking list	First entry on file	
27/10/2008 ANGKIRIWANG, ELBERT~~		
Number of entries in file : 13		Print this file
The MUSAC Accounts ledger summary batch 25/10/08 87810 Payment received 5.00 0.00 C	First entry on file	
Number of entries in file : 29		Print this file

Figure 187: The 'Temporary lists' screen

There is also an 'Advanced Print Option' button at the bottom of the screen (Figure 188).

Advanced Print Option

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	r printing	Offer these printing form options at the end of every batch
The list of items invoiced	ast entry on file	
14/11/2008 12:21:25 ALAVI, ERFAN Testing 2 50.00 0.00	D	
Number of entries in file : 193		Print transactions
The banking list	ast entry on file	
05/11/2008 14:21:00 BAGLEY, SOLOMON 0.00 0.00		
Number of entries in file : 13		Print transactions
The MUSAC Accounts ledger summary batch L 14/11/2008 11:10:07 87810 Payment received 5.00 0.00	ast entry on file	
Number of entries in file : 794		Print transactions
The Financial transaction list	ast entry on file	
14/11/2008 12:21:25 MUSAC MUSAC ALAVI, ERFAN 50.00 0	0.00 663	
Number of entries in file : 806		Print transactions
 Select only active transactions for this user. 	Output to printer	
O Select active and deleted transactions for this user.	Output to screen	
O Select all Active transactions		
Select all Active and Deleted transactions.		
O Select all transactions From Date - To Date 16/1	11/2008 16/11/2008	
Select all transactions for Batch Number:	657 Re	fresh

Figure 189: Advanced Print Options

18.6 Printing statements



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.

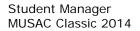
Step 1: Selection of statement and default settings (Figure 191)

atement 1.dmt	Number of copies 1 copy	×
	Number of first statement 7130	
	Pause after printing every 50	documents (no entry means no pauses)
	Print	Autopayers
	 One statement per student 	 Include all students
	One statement per family	O Include only non-autopayers
	Statement type	
	 Traditional statement Opening Balance All transactions since last balance Closing Balance recorded 	clude full breakdown of payments e
	 Full statement - including tran 	sactions between 01/01/2008
	No Opening Balance Selected Unpaid Items Unallocated Payments received	and <u>16/11/2008</u> (if selected)
	Balances	
	• Exclude those with nil or cred	t balances
	Exclude just those with nil bal	ances
ted Statement my D	O Print all regardless of balance	s
atement my D	O Print just those with outstand	ing debt greater than 🗸

Step 1 Selection of the statement and default settings

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.

elect the required items	Hold Ctrl to multi-select	
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	H = Teach
School (2+)JH	200.00	
School fees for 3 terms	100.00	V = Form
School fees for 2 terms	150.00	S = Sibling count
School fees - 3 terms 2+	105.00	5 – Sibiling counc
School JH	300.00	E = Eldests only
10ART - Terms 1-2	10.00	V _ V
10ART - Term 3-4	10.00	Y = Youngests or
Art Yr 11	30.00	O = Option class
Art Yr 11 - 3 Terms	23.00	
Art Yr 12	30.00	L = Popup entry
Art Yr 13	30.00	A = Ask how man
Art for 3 terms	23.00	A - ASK NOW MUN
Art for 2 Terms	15.00 🗸	
Number of items selected : 0		
Select All Rememb	er these OK	Cancel

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.

Step 3 Selection of the students	Student	Year	Teach	Form	1
<u> </u>	STREET, STREET	12	11	11SF	
	WARREN - CONTRACT	10	10JH	10JH	
 Students in the current filter (shown) 	0040000 - 170007 Apr	12	11	11LS	
You may select individual students from those listed	property of the second second	14	13	135N	
Too may select marriadal stadents from those listed	and and the second s	12	11	11MP	
	100740-1-0074-1-00000	13	12	12PE	
	100 (00000	13	12	12BR	
O Apply further restrictions to the current filter	1011000000 (1000000)	13	12	12SP	
	101000000000000000000000000000000000000	11	10VR	10VR	
	101000000000000000000000000000000000000	13	12	12BD	
Printing order	10-1-100/01000	14	13	13KN	
Print in alphabetical order	BARG	10	10JH	10JH	
	Mail 1996 February - Address	12	11	11KL	
O Print in Teach order	10-1-10-00-00-00-00-00-00-00-00-00-00-00	14	13	135N	
O Print in Form order	BURGER, PRIME	11	10HD	10HD	
	State of the state	13	12	12BD	
	101-1000 (1000000 -	10	10JH	10JH	
	101-1010 (1000 0000)	12	11	11PC	
	ELECTRON CONTRACTOR	10	10JH	10JH	
	BUILDER (HEBBI)	12	11	11CY	
	APPROX ADDRESS TO ADDRESS ADDR	12	11	11KL	
	101 000 101 001 1000 000 000 000 000 00	14	13	13BT	
	HALF AND HERE IN CALIFORNIA	13	12	12PE	
Remember that to select more than one student	CONTRACTOR OF CONTRACTOR	13	12	120N	
either click and drag or hold down Ctrl and click	and a second sec	11	10KG	10KG	
Select All	00000000000000000000000000000000000000	11	10HD	10HD	
	WHAT IS THE PARTY OF A MARK	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.



Step 3 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).



Step 4 Final decisions

You are about to : Print traditional statements for 17 students printing 1 copies of each statement excluding those with nil or credit balances Printing will be paused after every 50 invoices printed	iREENSLADE Balance : 774.00 Dr Balance : 216.00 Dr 125.30 Dr I FRANK Balance : 121.89 Dr WADARA Balance : 93.00 Dr OLUWAPELUMI Balance : 233.00 D Balance : 366.34 Dr : 438.00 Dr ance : 110.00 Dr MILTON Balance : 323.00 Dr
Either Figure 195: Fina I0 students' statements printed Some may have been omitted due to	al approval
ок	

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 s	Printing statements			
Step 4 F	inal decisions			
You are ab	but to :	Musac, Musac A Balance : 0.00 Dr		
Print st	atements relating to 111 selected items			
Print st 14/05/2009	atements for transactions between 01/01/2009 and			
for 1 st	tudents			
printing	g 1 copies of each statement			
printing	all regardless of balances			
Either	Proceed to Print Statements			
Or	Save as PDF Files and Email to Caregivers			
Or	Just Print a List of Qualifying Students and Their Balances *			
* 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)			

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.

Student Musec, Musec A Ba	Rance : 0.00 Dr	Caregiver A Musac Mu	880	eMail address musac@massey.ac.nz	Send V
School email address	Gmasser	ac.nz			Select Al
School ISP provider e.g. smlp.xtra.co.nz	smtp.massey.ac.	ne			
Enal message	This is a Statemen	nt for the parent	a of {cm.col(1)}-{cm.col(2)).	

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.



Student Musac, Musac A Be	lance : 0.00 Dr	Caregiver A Music Music	eMail address musac@massery.ac.nz	Send +
chool email address	Qmassey	ac.nz		Select Al
chool email address School ISP provider e.g. smtp.xtra.co.nz	Omassey smb.massey.ac.r		MUSAC Classic 2009	Select Al

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.

Dist ALL BLO	Student		Date	Amount	 Receipt 1.dmt
Print ALL 'Not issued' receipts	Al	HLEY	14/11/2008	10.00	Receipt- fullpage.dmt
issued receipts	Al	HLEY	14/11/2008	10.00	Receipt-3 per page.dmt
Print selected 'Not issued' receipts	Al	HLEY	14/11/2008	10.00	Receipt-half page.dmt
	Al	HLEY	14/11/2008	10.00	
	Al	HLEY	14/11/2008	10.00	
Issue receipt	Al	HLEY	14/11/2008	10.00	
numbers to	Al	HLEY	14/11/2008	10.00	
selected Not	Al	HLEY	14/11/2008	10.00	
issued' receipts	Al	HLEY	14/11/2008	10.00	
Print / Re-print	Al	HLEY	14/11/2008	10.00	
selected numbered	Al	HLEY	14/11/2008	10.00	
receipts created	Al	HLEY	14/11/2008	10.00	
between	Al	HLEY	14/11/2008	10.00	
01/11/2000	Al	HLEY	14/11/2008	10.00	If you select a receipt design which
01/11/2008 and	Al	HLEY	14/11/2008	10.00	involves more than one receipt per page and particular receipts have
	Al	HLEY	14/11/2008	10.00	more items than will fit on the desi
16/11/2008	Al	HLEY	14/11/2008	10.00	then these receipts will be left
Re-load List	Al	HLEY	14/11/2008	10.00	unprinted for you to select a large
	Al	HLEY	14/11/2008	10.00	receipt design.
	Al	HLEY	14/11/2008	10.00	
	Al	HLEY	14/11/2008	10.00	Proceed
	Al	HLEY	14/11/2008	10.00	
	Al	HLEY	14/11/2008	10.00	
	Al	EL	14/11/2008	10.00	
	Al	EL	14/11/2008	10.00	
	Al	EL	14/11/2008	10.00	
	Al	IE	14/11/2008	10.00	
	Al	IE	14/11/2008	10.00	
	Al	IE	14/11/2008	10.00	
	Al	IE	14/11/2008	10.00	
	Al	IE	14/11/2008	10.00	
	Al	IE	14/11/2008	10.00	
	AI	IE	14/11/2008	10.00	
	AI	IE	14/11/2008	10.00	
	Al	IE	14/11/2008	10.00	
	AI	IE	14/11/2008	10.00	
	Al	IE	14/11/2008	10.00	
	Al .	IE	14/11/2008	10.00	~

Figure 198: The screen for printing not issued receipts

There are a few options to choose from to print receipts. The first one 'Print all Not issued receipts' will make the middle of the screen disappear as the selection has already been made so move to Step 3.

The second selection 'Print selected not issued receipts' will give users a list of students whom receipts were not printed. Select those to print and then click 'Proceed' in step 3.

The third selection 'Issue receipt numbers to selected not issued receipts' will give you a list of those receipts not yet given a number and issue one to it. This area will only need to be used if an older version of Student Manager was used before the automatic allocation of receipt numbers was put into the program.

The final selection 'Print/Re print selected numbered receipts created between' will give users an area to put a date range in. Once this is filled in click 'Reload list', and select the receipts to be printed, hold down Ctrl to muti select.

Step 3 is where users select the receipt design. Once chosen click 'Proceed' and the receipts will be printed.



18.8 Consolidation



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).

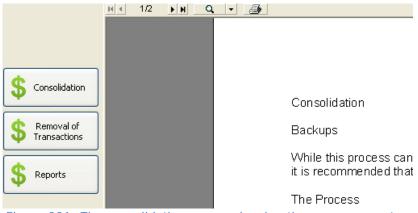


Figure 201: The consolidation screen showing the on-screen notes

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'.



C I G D R R R D	Item Payment received Testing Testing 2 9ART - Term 1 9ART - Term 2 9ART - Term 3	G.S.T.
I G D R R R	Testing Testing 2 9ART - Term 1 9ART - Term 2	G
G D R R R	Testing 2 9ART - Term 1 9ART - Term 2	5
D R R R	9ART - Term 1 9ART - Term 2	
R R R	9ART - Term 2	
R R		
R		
	9ART - Term 4	
1.21	School (2+)JH	
R	School fees for 3 terms	
R	School fees for 2 terms	
R	School fees - 3 terms 2+	
ĸ	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		
	२ २ २ २ २ २ २ २ २ २ २ २ २ २ २ २ २ २ २	 Art Yr 11 Art Yr 11 - 3 Terms Art Yr 12 - 3 Art Yr 12 Art Yr 13 Art for 3 terms Art for 2 Terms Art for 2 Terms Photography Yr 12 Photography Materials 9Performing Arts 9Performing Arts - Term 2 9Performing Arts - Term 3

Igi

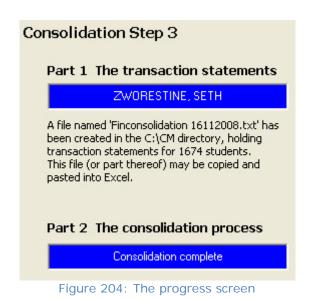
The second step is to indicate whether to produce a trial run or proceed with the full process (Figure 203). Whichever way is chosen the user will be asked to confirm that decision by typing in 'yes' then click 'Proceed'

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' Yes
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).



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.

/USAC Demonstrat	ion 03/03/3	00.9			Consolio	lation
NO SAC DEMONSU a	.01103/03/2	.000			Consolic	10001
ULL CONSOLIDATION						
Nate	Date	Item	Dr Amount	Cr Amount	Balance	G.S.T
BRAHAM, JOEL						
re-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 D0 Cr	
Consolidate	13/08/2008	Payment received		300.00	150 D0 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	

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.

O Remove transactions	; prior to : 31/12/2007	
• Remove transactions Which relate to	s dated : 16/11/2008	
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

Send Batch to 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).

?	Are you sure that you wish to transfer your currently held batch to Accounts
	Yes No

Figure 210: Approval to transfer

By clicking 'yes' a message similar to that shown below will be displayed (Figure 211).

	smFinancials 🛛 🔀	
	Transfer complete Number of transactions : 16 Number of ledgers involved : 3 Total transferred (incl GST) : \$21,793.00	
igure	211: The completed transfer me	essa

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

18.10 Designing financial documents

of this file at any stage go to 'Printing of temporary lists'.

Click 'Design Financial Documents' for access to design per-student financial documents, invoices, statements, credit notes and receipts.

Financial document des	ign	
Document type	Invoice 1.dmt	
 Invoices 		
◯ Statements		
OReceipts		
O Credit notes		
		💽 A4 - full size
	Design a New Document	A4 - two per page
	Edit Selected Document	○ A4 - three per page
	Delete Selected Document	

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.

Financial document d	esign	
Document type Invoices Statements Receipts Credit notes	Receipt 1.dmt Receipt- fullpage.dmt Receipt-3 per page.dmt Receipt-half page.dmt	⊙ A4 - full size
	Design a New Document	🔾 A4 - two per page
	Edit Selected Document	○A4 - three per page
	Delete Selected Document	

Figure 248: A new or existing document

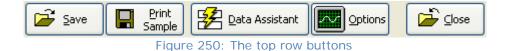
This example is the 'Receipt - half page' document, highlight the document and click 'Edit selected document'. This takes me through to the design section, which appears as shown below (Figure 215).

Save Print Sample	🛃 Data Assistant 🛛 💽 Options 🛛 🔁 Close
General A Image: A marked state	{cm.special(1)} Received from : {cm.col(3)} (cm.col(1)) : {cm.special(21)}: {cm.col(17)} Date : {cm.special(26)} Base : [cm.special(26)] Received : up to 7 Items per page Total amount received : {cm.fin(12)} Received with thanks : }

Figure 249: Editing a financial document



At the top of the screen are five buttons (see below):



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.

				Vol									÷-		- : -		- :	÷ ;		-:		÷		-:-	÷	÷	÷		÷-		÷-		ł	:	:		6,8 111	5, I., I-2	. ņ. 22	-33 -33	bei 333	r 	
ate : {		spe	icia 	44	ΞŴ.		- . -		÷-		-11				÷			: :				:				÷					÷		:										
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	• •	• •	• •	• •	•	• •	·	• •	•	• •	·	• •	·	• •	·	• •	•	• •	• •	•	• •	•	• •	·	• •	•	•	• •	•	• •	•	• •	·	• •	·	• •	·	• •	•	• •	• •	• •	• •
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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 receipted 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).

Reç	eji	pt -	÷ι	įρ	to	7.	:	:			:	:			:	:		:				:			:			: 7			:						: :	: :		:	:	: :	:	:	: :	. :	:			:			:		÷
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• •	•	•	•	•	- ·		÷	1	2	\mathbf{x}_{i}	•	1.1				2		•			•					1	11	•	12	•		1	1.1		1	\mathbf{x}_{i}	•	•	1	•	1		•	1.1	1	10.0	12	2.1		1.1	2	1.1	1.1	2	·
• •	•	•	•	•	• •	•	•	•	•	•	•	•	•	• •	•	•	•	•	• •	•	•	•	•	• •	•	•	•	• •	•	• •	•	•	•	• •	•	•	•	• •	•	•	•	• •	•	•	• •	• •	•	•	• •	•	•	• •	•	•	•
	•	•	•	•	• •		•	•	•	•	•	•		• •	•	•	•	•	• •	•	•	•		• •	•	•	•		•	•	•	•	•	• •	•	•	•	• •	•	•	•	• •	•	•			•	•		•	•		• •	•	
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Figure 253: The 'financial object' in the document

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\$	۲	7	e		
		lse this ur docu		e a fina	incial
Final	icial P	ropenti	es	_	\$
Top	icial P		es 440	_	\$
	icial P	1		_	<u>\$</u>
Тор	icial P	1-	440		\$
Top Left		1- 6-	440 00		\$
Top Left Width		1 6 1 2 2	440 00 0440		\$
Top Left Width Height	t	1, 6, 11, 2,	440 00 0440		\$
Top Left Width Height Type	t	1 6 1 2 2	440 00 0440 760		\$

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).

Doc	ument type : Re	eceipt							
1.				to include in the doc ust the column widths by d	c ument? Iragging the boundaries of	the colum	ns in the top		
	Number of co	umns : 5	row	. Click in the second row to	o select the type of entry	you require	•		
	Heading	Date	Invoice	ltem		Cost	G.S.T.		
	Туре	Date	Invoice	ltem		Cost	G.S.T.		
			_					_	
2.			u wish to u I in the table al	se for the report?	Adjust Font				
з.	Heading bo	old							
4.	Alternate l	ines sha	aded grey						
5.	Hide lines								
			E !	001 The fame	4		and the second second		

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.



Heading	Date	Invoice	ltem		Cost	G.S.T.	
Туре	Date	Invoice	ltem	•	Cost	G.S.T.	
Which for	ts do voi	u wish to u	Date Invoice				
		in the table at					
Jooding be	old						

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).

Font			? 🗙
Font: Aria Arial Arial Black Arial Narrow Arial Rounded MT Boli Arial Unicode MS Baskerville Old Face Bauhaus 93	Font style: Regular Regular Italic Bold Bold Italic	Size: 10 11 12 14 16 18 20	OK Cancel
	Sample AaBbYyZ Script: Western	z	

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).

ţţ ţ	amount received : {cm.fln(12)}	
R	Word Processor	•
÷	OKCancelArial9FB / U{a} D ■ ■ ■ ■ ■ ■ ■ Sp Zm tal amount received : {cm.fin(12)}	

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.

Grade specials	Linked comm	ients L Column title	es SM Specials	1	1
Genders	Names Financials	Activities	Pastoral specials	CF Specials Columns	Count Specials
Caregivers	Financials		Fastoral specials		speciais
Student's financial de	etails	Financial docume	ent components		
Total current debt		Total amount due	Mail to'		
Current month's debt		Amount in words	'Mail to' addre	ess 1	
Outstanding one month d	lebt	Total GST	'Mail to' addre	ess 2	
Outstanding two months	debt	Page count	'Mail to' addre	ess 3	
Outstanding three months	s debt	Invoice number	'Mail to' addre	ess 4	
Outstanding four months	debt	Statement number	Mail to' addre	ess 5	
Outstanding more than or	ne month	Receipt number	20 22232		
Outstanding more than tw	vo months				
Outstanding more than th	ree months				

Figure 225: Selection of a financial code for insertion

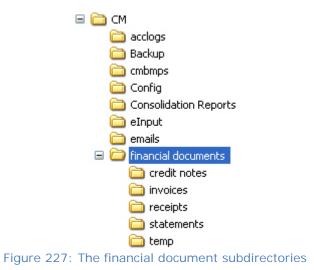
The small box in the top right hand corner of this document has a receipt number field and G.S.T number (Figure 226). Again the receipt number is added by Editing the details and adding it through the '{a}'. The G.S.T number is a default number and will need to be edited by the school to add their own.



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).



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'.

- All Documents	Student : Musac	A Musac			Year : 1	1 Class	: Ro	om : KWL			1			B
	Student's P	hysical A		r.	Stud	lent's Po	stal A	ddress	Preferred					
	Mail to whom	Musac		1										
	Address 1	Address 1		ĩ	Postal ad	dress 1	Addr	ess 1						
Personal details.dmt	Address 2	Address 2			Postal ad	dress 2	Addr	ess 2						
	Address 3				Postal ad									
	Address 4				Postal ad									
	Address 5				Postal ad	dress 5								
	Postal code	4442			Postal co	de	4442	1						
			Copy >	1				<	Сору	1				
	Mail to greeting			-	Geocode		_							
	mail to greeting				Geocode									
	* In addition to the also has two address indicate which of the be used when you d caregiver? It depend	ses and in a two is 'Pref esign a doct s. Click on t	Il cases you can erred'. Which one wi iment addressed to : he 'More information'			d invoices t d reports to	Mail to	o whom' (a	above) No bove) No					
	button for a full desc and how the program						* Mo	re information						
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	Add Prev	Next	Print View	Alarms	Filter	< Page	1/1	Page >			He	ip 🛛	Close	

1 Set up one statement with the Caregiver address.

musac

Student Manager MUSAC Classic 2014

RTF code selection	
CF Specials	
Columns	
Caregivers	
Step 1 Select caregiver	
First financial = Yes 💌	◀
Step 2 Select field	
Family name	
First names	
Title	"First Financial

"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".

RTF code selection
CF Specials
Columns
Caregivers
Step 1 Select caregiver
Becond financial = Yes 👻
Step 2 Select field
Family name
First names
Title

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

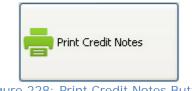


Figure 228: Print Credit Notes Button

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 :	Step 2 Sele	ect		Step 3 Select
Issue Numbers to ALL 'Not issued' credit notes. (This routine updates the database and allocates numbers to Credit Note transactions.)	Student ALI, AHMED	Date 17/11/2008	Amount 33.00	Credit note 1.dmt Newcreditnote.dmt
Print/Reprint selected Numbered Credit Notes created between				
17/11/2008 and 17/11/2008 Re-load List				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
	Select All	Select the Credit No wish to print, select and then click 'PROC Credit Notes.	the Credit Note format IEED' to print the	



19 The Printing Utility

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, userdefined 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.

<u>U</u> ser Defined
Fast Lists
<u>Special Lists</u>
<u>S</u> ettings
<u>F</u> ilter
Show Filter Data (253 records)
List Filters
~
Main Filters
Full time and Part time studen 🐱
Caregiver Mode
⊙ Off On

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.

🕌 File	
Available tabular l	ists
Look in: Shared	📢 🗐 📀
□ 🔁 Personal □ 👉 Shared □ □ 🗁 New Folder	Class list, DOB, & age email Previous Schools student address details student bus details Vision Testing
File name: student address de	
🗌 View file 📃	View defaults 🔽 Safety catch

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.

Report	Designe	r: Untitle	d				
ile Tools	-						
) 🖻 🛠	• Y 🖪	6	Arial			✓ 13	~
28,17.6				. 100 110 120	120.140.150	160.170	10
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-							
						~	

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.

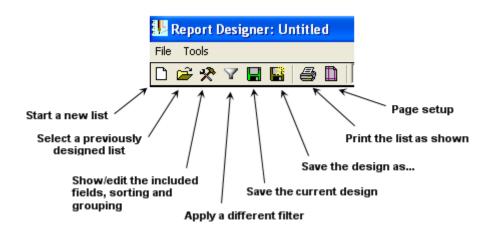
👭 Report Designer: Untitled		
File Tools		
🗋 😅 🛠 🍸 🔚 🔛 🎒 🚺 🛛 Arial	✓ 13 ✓ B I U A Ξ Ξ Ξ (a) 75%	🕑 🗄 🖆 🎁 🗌 View Summaries



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.





Adding Data Fields

Click the utilities button 🖄 to open the utilities dialog box.

🕌 Properties & Utilities: Untitled									
Fields Priority General	File								
Add database columns Add a blank column Add a script column Remove this column		Statistics							



Click the Add database columns button to bring up the column picker.

📙 Select Columns		×
ClassRoom Manager Student Manager Personal [Family Name]	Selected column:3	
[First Names] [Freterred] [Invoices] [Reports]		
[Address 1] [Address 2] [Address 3] [Address 4] [Ward]		
Wationality] [Language] [Changes of school] [This Year]		
[Form] [House] [Next Year] [Form(Next year)] [House(Next year)] [Gender]		
[DOB] [Enrol#] [Date first started] [Date started here] [Tupe]		>
	Proceed <u>C</u> ancel	

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.



Family Name Preferred		^
📕 Properties & Utilities:	Untitled	×
Fields Priority General Family Name Preferred Preferred Add database columns Add a blank column Add a script column	File Statistics ✓ None CountGroup CountAbsolute Width (mm) Data Type Text Alignment Left Centre Header Preferred Condition	3
Remove this column	Font) MS Sans Serif	

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.

RTF Editor													
🞒 Tahoma	▼ 8.2	<mark>∼</mark>	8	B	I	<u>u</u>	E I	{a}	IΞ	ŧ	ŧ	**	{} ABC
1													
1													
									_				
									L	2	lose		J

Figure 10: The RTF Editor

Click (a) on the toolbar to open the RTF code selection tool.

•



Caregivers CF Specials	Financials Count	Activit	ials Linked comm		Generic Caregiver
Columns S	pecials	Genders	urrent age (yy.mm.dd)	Time since started schoo	
Date 1	Date 3		anonk ago (y.mm.ad)		ing (yy.niin)
1)ate 4 AC MUSAC		an 1st age (yy.mm.dd) an 1st age (yy.mm)	Time at this school (yy.m	
User name 2		T	me since enrolled	Time in New Zealand (yy	
	Teacher Teacher		·	Time at this school (yy ye Time in NZ (yy years mm	
Current date dd Month Year	Current year	Horizontal title	Local student ID Form	,	
Current date dd/mm/yyyy	Next year	Vertical title	House	Page Number Page nu	mber

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.

📕 Properties & Utilities: 🛙	Untitle	ed	×
Fields Priority General Family Name Preferred	File	Statistics	
This Year Tutor Time Here	Ŧ	Column .1 CountGroup Width (mm) 40.21667 Autosize Sum Data Type Script Std. Devn. Alignment Left Centre	
Add database columns Add a blank column		Lo Quartile Header Time Here Median Condition	
Add a script column		Include page statistics Include overall statistics	
Remove this column		Font MS Sans Serif	

Figure 9: The properties of a Script column



1

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
; 1 1 1	- university	13	RWRI	5 years 1 months
6.4.6.4.500	A THE IF	13	NDON	5 years 1 months
$\Delta_1 b = a^2 = -b_0$	ine d	13	KEDS	5 years 1 months
1.01.1	Post :	13	NDON	5 years 1 months
-	Medicina	13	NDON	5 years 1 months
an thrait	March e	13	NDON	5 years 1 months
91.1.1.1.1	Te ibea	13	KEDS	5 years 1 months
0.011.0004	May and	13	NDON	5 years 1 months
61 (C. 7 4)	5 W 000	13	TATK	5 years 1 months
69.69.2	- a. (a	13	KMCF	4 years 10 months
e (6. j.	. ann	12	NDON	4 years 1 months
0.00100.1	L LANK	12	TLEW	4 years 1 months
424 a. 1	i shua	12	NGIB	4 years 1 months
2.0000	, and r	12	RWRI	4 years 1 months
2010 C 4009	can ne y	12	RWRI	4 years 1 months
aleft and	one est	12	RWRI	4 years 1 months
vite ti≜	Nummer -	12	TATK	4 years 1 months
 4.0% 	 game 	12	RLIS	4 years 1 months
1 2490		12	NGIB	4 years 1 months
00000000	le i	1.0	DARO.	1

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.

💵 Properties & Utilities:	phil		
Fields Priority General	File		
Family Name Preferred This Year Tutor Months Here Add database columns Add a blank column Add a script column Remove this column		Statistics None CountGroup CountAbsolute Sum Mean Std. Devn. Minimum Lo Quartile Median Hi Quartile Include page statistics Include overall statistics Font	

Figure 11: Showing column statistics

When printed, the values are displayed as shown below:

Family Name	Preferred	This Year	Tutor	Months here
(A) (A	state	11	KDUF	38
EL AND	177.0	11	KDUF	38
AL EAT		12	KDUF	13
EC AARD S	. je	11	KDUF	38
6 - Mar 1	jehra –	13	KDUF	41
1. (6.4.4.7.0)	- # +	11	KDUF	38
0 AJU 7 1 B	Autor	11	KDUF	25
10 h B		13	KDUF	38
R.E. S.	Matt.	11	KDUF	38
CATE NO. ERE	i. r	13	KDUF	13
M. NELL	g 100	11	KDUF	38
MENER RAMINELLO	Ad the	11	KDUF	30
Market (19	Tenergie -	11	KDUF	38
EALE, E	11 A. A. 1	11	KDUF	38
e Alton Tole Agrandia	i	11	KDUF	12
64 A 64 (1116)		11	KDUF	38
-	i eter	11	KDUF	38
5 A.	jegarama 🗌	12	KDUF	12
			Group = 18	Mean = 31.33 Std.Devn. = 10.97

Time (in months) at this school Tutor KDUF

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.

🞚 Prop	erties & l	Utilities: l	Untit	led			×
Fields	Priority	General	File				
Family I Preferre This Ye Local s	ed			Family Name This Year	Sort Break Action	Ascending	

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.

This Year	Local	5 D				
9	19600548	and blob	erties œ	Utilities: L	Julilie	a 🔼
13	19600282	Fields	Priority	General	File	
9	19600549			1		
12	19600270	- Heade	er			
13	19600196		Awiel 0.0			
9	19600550	Font	Arial, 8.2	spc		
11	19600358			Bac	kcolour	
10	19600455					
11	19600360			Fore	ecolour	
10	19600456	-				
13	19600197	Grid -				
10	19600457		Awal o c			
10	19600458	Font	Arial, 8.2	:5pc		
10	19600543				_	
12	19600272		Tinteo	Row Count	1	
11	19600363		N	-1 D C	E	
12	19600274		Norma	al Row Count	5	
13	19600199		Row Heig	bt (mm)	4.07458	Autosize
12	19600275		1.01111019		4.01 400	
10	19600460	Grid Co	lour 🗌			All 🗸
12	19600276					
13	19600200					
13	19600515					

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.

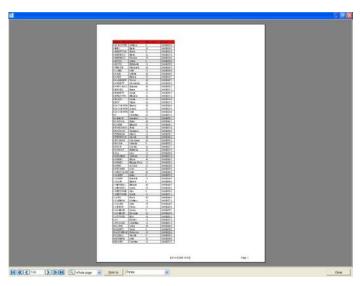


Figure 15: The list is ready for printing

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).

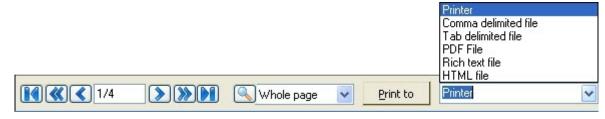


Figure 169: The printer pop-up

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.

+	+ ∔→
÷	Page Header
	List Header
+	Family Name Preferred
Ŧ	and Evel weight and thereing
+	anantipa (100 - 100-100-11
Ŧ	No i Paleira Bastropa

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.

rt Designer: Bus List 21 pols							
* * * - - -	Arial	• 10 • B <i>I</i> <u>U</u> <u>A</u>	= $=$ $=$ (a) 100%				
					lindies		
09 February 201	^{1 at 15:34} Need a	a gap under the last text row	v for all				
Duty Teacher: 🙏		vs to display correctly					
Duty reacher.							
Bus Studer	nts						
Family Name	First Names	Form Address 1	Address 2	Address 3	Address 4	Bus 1	
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the same	The second	10.5 (AL)	1.0	1.1			
Contraction of the second	all as	1985 Autophteens for	2 april 2 1				
	The Red Lines	C.Y. Biller Street	they have	in setting			
	State State	100% Compter Series	1000 C	Auger .			
and the second s							
	April Lands	The Damps Con	To not the	Sec. 1			
-				Contract of Contra			

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.

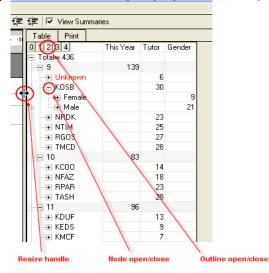


Figure 191: Example summary data

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.

Graphics → → → ↓ → ↓ → ↓ → ↓ → ↓ → ↓ → ↓ → ↓ → ↓	
	2 -
▶ 2 ⁹ · · · · 1 ⁹ · · · · 2 ⁹ · · · · 3 ⁰ · · · 4 ⁰ · · · 5 ⁹ · · · 8 ⁰ · · · 7 ⁰ · · · 8 ⁰ · · · 1 ¹ 0 · · · 1 ¹ 0 · · · 1 ² 0 · · · 1 ⁴ 0 · · · 1 ⁵ 0 · · · 1 ⁴ 0 · · · 1 ² 0 · · · · · 1 ² 0 · · · · · · · · · · · · · · · · · · ·	
	_

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.

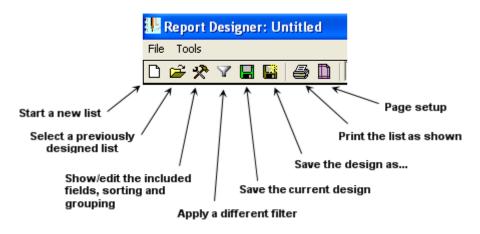


Figure 223: The utility toolbar buttons

The other buttons relate to text and layout.

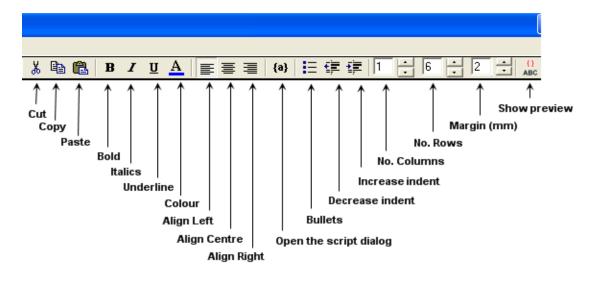


Figure 234: The text and layout toolbar buttons

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 righthand panel is the preview.

Middle Earth School	Middle Earth School
1234 Hobbiton Road	1234 Hobbiton Road
Tolheinton	Tolkeinton
{cm.special(25)}	D7 March, 2007
Parent/Guardian of {cm.col(3)} {cm.col(1)} {cm.col(7)} {cm.col(8)} {cm.col(9)} {cm.col(10)}	Parent/Guardian of Lincoln ABRAHAM 1 Whitehouse Road Washington
Dear {cm.cg(13)} {cm.cg(11)}	Dear Mrs WALLACE
Today, {cm.col(3)} has been selected to represent the school at the interschool hobbit hurling contest. The event will be held at the Hobbit Hole in Matamata. Please bring your own hobbit.	Today, Lincoln has been selected to represent the school the interschool hobbit hurling contest. The event will be he at the Hobbit Hole in Matamata. Please bring your own hobbit.
Yours etc.	Yours etc.
Deputy Principal	Deputy Principal

Figure 246: Typical word processor layout

Adding Data Display Fields

Click utilities to open the RTF code insertion tool dialogue box.

RTF code selection					\mathbf{X}
Caregivers CF Specials Columns	Financia Count Specials	als Activities Grade specials Genders	Pastoral Spe Linked commer Names		Generic Caregiver SM Specials
1 2 3 4 5 Family Name First Names Preferred Mail to whom Invoices Reports Address 1 Address 2 Address 3 Address 4 Ward Nationality Language Character of externet	Columns	Display column contents Display column title (excluding markbook name) Display column title (including markbook name) Display column LDNG title N.B. You may quickly add the sl preferred name by typing Ctrl-N the word processor.		Extracts from markbook columns : round to nearest whole number?	
				Add column	s Close

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.

Middle Earth School	Middle Earth School	
1234 Hobbiton Road	1234 Hobbitou Road	
Tolkcinton	Tolkeinton	
22/10/2008	22/10/2008	
Middle Earth School	Middle Earth School	
1234 Hobbiton Road	1234 Hobbitou Road	
Tolkeinton	Tolkcârtou	
22/10/2008	22/10/2008	
Middle Earth School	Middle Earth School	
1234 Hobbiton Road	1234 Hobbitou Road	
Tolkcinton	Tolkciston	
22/10/2008	22/10/2008	
Middle Earth School	Middle Earth School	
1234 Hobbiton Road	1234 Hobbitou Road	
Tolkcinton	Tolkcistou	
22/10/2008	22/10/2008	
Middle Earth School	Middle Earth School	
1234 Hobbiton Road	1234 Hobbeton Road	
Tolkeinton	Tolkeistos	
22/10/2008	22/10/2008	

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.

Columns	: Count	Gende		comments Colum es I	ц	pecials
Caregivers	Financials	Activities	Pastoral Spec	cials Attendance	Generic Careg	jiver
Caregiver Specific I	Details			Student - Caregiver E	etails	
Family name	Home_Phone	CG User Title 1	eMail_Address	Relationship	User_flag_1	
First names	Work_Phone	CG User Title 2	ID	Invoices	User_flag_2	
Title	Fax_Number	CG User Title 3	Caregiver Number	Reports	User_flag_3	
Password	Cell_Phone	CG User Title 4		Voting Rights	User_flag_4	
Postal_Zip_Code	Other_Phone	CG User Title 5		Emergency Contact	User_flag_5	
Postal_Address_1	Physical_Address_1	CG User Title 6		Living With	User_flag_6	
Postal_Address_2	Physical_Address_2	CG User Title 7		Legal Guardian	User_flag_7	
Postal_Address_3	Physical_Address_3	CG User Title 8		Access Rights		
Postal_Address_4	Physical_Address_4	CG User Title 9		Count Reports	V Y V	
Postal_Address_5	Physical_Address_5	CG User Title 10				

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.

.{cm.pastorallist(2, 0, "01/01/2006(tab) 21 {tab} 2>")}	OC LATE TO ADMIN X 3
C → OC ← LATE TO ADMIN X 3 OC BUNKING OC LATE TO ADMIN X 3 OC LATE TO ADMIN X 3 OC LATE TO ADMIN X 3 TR ABUSE OF TEACHER	OC OTHER RA OTHER pl ANSWERING BACK

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} {Date}	The current system date and time The current system date
{Day("3 Nov 2006")} date	The numeric value of the day component of the supplied
{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
vbGeneralDate	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.
vbLongDate	1	Display a date using the long date format specified in your
		computer's regional settings.
vbShortDate	2	Display a date using the short date format specified in
		your computer's regional settings.
vbLongTime	3	Display a time using the time format specified in your
		computer's regional settings.
vbShortTime	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
уууу	Year
q	Quarter
m	Month
у	Day of year
d	Day
W	Weekday
WW	Week
h	Hour
n	Minute
S	Second

{DateAdd("ww",3,Now)} {DatePart("y","13/5/2007")}

Add the specified number of intervals to the supplied date 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,vbMonda	y)} 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>)}

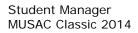
This function returns one of two results depending on the outcome of a logical comparison. For example:

{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^{rd} 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

С	Display the date as ddddd and display the time as ttttt, 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 \mathfrak{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 $(1 - 4)$.
у	Display the day of the year as a number (1 – 366).
уу	Display the year as a 2-digit number (00 – 99).
уууу	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).
Ν	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

Description

Display the number with no formatting.

Character

None

(0)	Digit placeholder. 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 than there are zeros to the left of the decimal separator than there are zeros 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 (O 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

CF Specials	Count	Grade specials	Linked commen	ts Column title	es 📙 SM Specials
Columns	Specials	Genders	Names		
Caregivers	Financials	Activities	Pastoral Specials	Attendance	Generic Caregiver
Transaction specific o	details Amalga	mated details			
		transactions. If more than o	one, records will be sep	arated by a return and	line feed. Several fields
can be included and fo Select Range	rmatted in the HTF bo	ox.	Transaction date	Detail 1	Comment
Most recent one	~		Teacher name	Points 1	Action
💿 Any year 🛛 🔘	This year		Teacher Code	Detail 2	Action comment
			Teacher Title	Points 2	Other
Include types			Teacher Surname	Detail 3	Time taken
	Not completed		Teacher Firstnames	Points 3	Completion status
V Not Applicable	Completed		Teacher Initial		
					ОК

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.

{cm.col(1)}, {cm.col	3))		{cm.col(18)}	{cm.pastoral(200616)}
Teacher	Date	Status	Comment	
(cm.pastorallist(3, 0, *01/0	1/2006,31/12/2007,<2	2> 25>. 23>	•>	<20* <8×*))
		·	This is it.	1
then a dot, then so	urname			
ABRAHAM, Lincoln			TWAR	3
ABRAHAM, Lincoln Teacher	Date	Status	TWAR	3
	Date 16/03/2007	Status Not applicable		3
Teacher			Comment	3
Teacher	16/03/2007	Not applicable	Comment Flicking paper	
Teacher	16/03/2007 07/03/2007	Not applicable Not completed	Comment Flicking paper Pd 1 - wouldn't participat	
Teacher	16/03/2007 07/03/2007 23/02/2007	Not applicable Not completed Not completed	Comment Flicking paper Pd 1 - wouldn't participat Pd 2 - Lincoln was caug AWOL using cellphone	ht dropping litter settle and work. He is constantly

Figure 27: A pastoral script and the resulting output

The Figure below shows how the script interpreter will decode the message during printing.

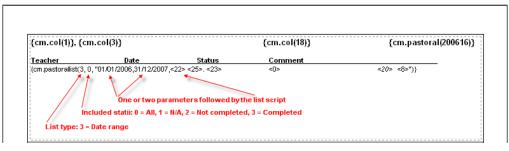


Figure 28: The components of a pastoral script

Adding a Graphic Object (Barcode, Photo, Logo)

Pictures maybe 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.

🛱 Properties for Un	titledGrapl	nic1				×
Name UntitledGra	aphic1		005	Left Top	0	
Picture						
Style Picture	~		Show	Graph	nic	
Border Style Solid	× 8 ×					
Bold Italic Underline Background Transpa	arent 💌					
<u> </u>				<u>C</u> ar	ncel	

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).

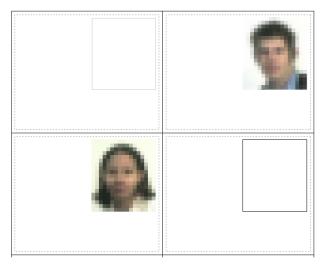


Figure 307: Displaying student photos

For a bar-code beneath the photo.

- Add another graphic object.
- Drag it to the desired position and resize it.

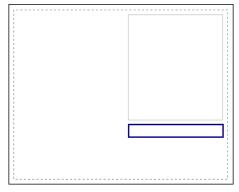


Figure 318: Creating a barcode graphic object

- 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).

Properties for Barcode	
Name Barcode	Width 1005 Left 0
Column 24	Height 1005 Top 0
Picture	
Style Barcode 🔽	Show Graphic 🗹
Border Style None 💽	
Font	Barcode Settings
Arial V 8 V	
Bold	Orientation Horizontal
Italic	Type Three of nine 💌
Underline	Text
Background Transparent 💌	Alignment Left 💌
ΟΚ	Cancel

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.

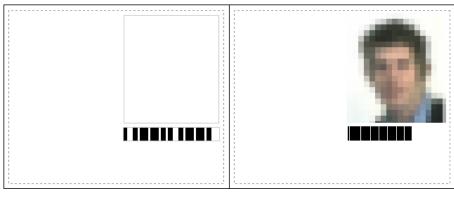


Figure 330: Sample barcode

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.

Properties for Name	
Name Name	Width 1005 Left 0
Column 0	Height 1005 Top 0
Picture	
Style Barcode 💌	Show Graphic 🗹
Border Style None 🖌	Show Graphic 🗸
	45 ÷
Font	Barcode Settings
Arial 🔽 8 🔽	Orientation Other
Bold	Type Three of nine 💌
Underline 📃	Text
Background Transparent 🗸	Alignment Left
<u></u> к	<u><u>C</u>ancel</u>

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 Li	sts	
Step 1	Step 2 Step 3	1
Select reco	rds to be included in ma	in filter (or set a filter at Step 3)
OCUM	ent filter	
◯ Scho		
◯ Sele filter	ction from current	
Output	Style	
💿 Star	ndard	
	ting 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.

et a filter at Step : s
5
ie
ne
rolme
r
er

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.

tep $\underline{1} \mid \text{Step } \underline{2} \mid \text{Step } \underline{3}$: Step 3)						
	Surname /	Preferred Name	Year	Form	House	Gender	Status	1
🔘 Current filter	14,489407539	Hadleyn.		1871	10001	Frank	P-dition 1	
🔾 School	1000	Ends		1.000	10001	Penalte	P-dilates	
	AND DESCRIPTION	rates		1871	1001	Panale	P-dime.	
Selection from current filter	angenet with	1140	1.0	1.000	104010	Penalte	Publicase	
jiiter j	(METRON)	Product		1.000	104010	Penalte	P-dime.	
Output Style	ARREST TO	(Reduct)			104611	Penale	P-dime.	
	ARRETTED.	1000		MPC .	104010	Penale	Published	
💿 Standard	perferences.	Ingham		10.00	10000	Penalte	P-dime.	
O Existing label	perception.	Table .		1100	-	Female	P-dime.	-
	State State State	T-shifts		100400	104011	Penale	P-dime.	
	1000100	free a		1.946	TANKS .	Panale	P-dime.	
	terms in a serie							

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.

🕌 Fast Lists	
Step 1 Step	2 Step <u>3</u>
Select a field for g	rouping and secondary filter (click the tab to set a group - click header to select/unselect all; else click, ctrl-click, click _drag)
Year Form	House Ethnicity Options None
Year 9 10 11 12 13	Select None

Figure 385: Selecting an item from the sub-filter

ep <u>1</u> Step <u>2</u> Step	2	
lect fields to be printed		
a se de conserve de la conserve de l		1 A STATE
Fields to be Included	Blank Columns	Format
Family Name	0 + How many?	 Normal: strict alphabetical
First Names		
Preferred	15 Width (mm)	○ A: year ascending
Gender	() () () () () () () () () ()	
This Year		OB: year descending
Form	Other Settings	O b: year descending
House	Page Setup	0
Next Year		C: Year ascending with breaks
Form(Next year)		
 House(Next year) MoE ethnicities 1 	Filter	OD: Year descending with breaks
Enrol#		
Status	Save	C E: Year ascending with breaks and total
Last Year Level		— ———————————————————————————————————
Form(Last Year)	Font name	Disable headers
House(Last Year)	(inc.)	Extend last column
Option 2008/1A	Arial	
Option 2008/18	ABC Size 10 V	Genders separate Asc. O Des
Option 2008/1C		
Option 2008/1D		
Option 2008/1E		Print
Option 2008/1F		
 Option 2008/1G Option 2008/1H 		
 Option 2008/11 Option 2008/11 		
Option 2008/11		
Option 2008/1K		
Option 2008/1L		
Option 2008/1M		
Option 2008/1N		
Option 2008/10		
Option 2008/1P		
Option 2008/1Q		
Option 2008/1R		
Option 2008/15		
Option 2008/1T		
Option 2008/1U Option 2008/1V		
 Option 2008/1W Option 2008/1W 		
Option 2008/1X		
Option 2008/1Y		
- openinger		

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.

	Additional and a second		
Paper			
Sige:	¥		
250 E	inter Auto Select		•
			•
Source: P	inter Auto Select	Bight	¥ 9.96

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.

			× * * * * * * * * * * * * * * * * * * *
Options	NZQA Standards	Schools	Activities
Years Forms Houses	Gender, Place & Ethnicity	Columns	Mark Books
Years Selected F	Forms Selected Houses	Status	Туре
Year 0 IUF Year 1 10W0 Year 2 11AH Year 3 11AH Year 4 12BE Year 5 12EE Year 6 12LE Year 7 13PM Year 10 9PE Year 12 9C Year 13 Year 14	BARK BIRH SPRT STUD	Full time Part time Leaver Pre-enrolment Delete Reset the filter to just Full and Part time students	Regular student International fee-paying student International Exchange student External student Regular Adult student Not attending Returning Adult student Student in Alternative Education Student in Alternative Education Student in Separately funded unit Student at a Kura Teina (Developing I Satellite class student Teen Parent regular > max. roll Teen Parent regular > max. Return. adult att. teen p. unit Teen p. elg.+ enrolled regular
Select individuals from all st	udents 🛛 🔲 Select individuals from c	surrent filter	
Unspecified			ly Save Cancel

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.

Special Lists		
Available Lists	No List Selected	Page Setup Magns
Principal's List Family Address Lists		Beader (nm) 10 +
Caregiver and Electoral Lists Guardian List		Eoster (mm) 10 +
Renamable Category Lists		[sp (mm) 20 🙏
Ages / Birthday Lists Caregiver Flag Lists		Bottom (mm) 20 +
Popup File Lists Medical Lists		(eft (nm) 20 -
Pupil Address Lists Random Groups		Bight (mm) 20 ÷
Print Labels		Paper Size
Picture Report Group Photo Report		
Barcode Report ID Card Report		
Iwi lists Future Sblings List		
Who was enrolled as at?		Height (nm) 297 *
		Orientation
	Font: Arial	
	FORCE AND	Columns
		Number 1 +
		Separation (mm) 15 +
Saved List Definitions	Gravpings	
Saved List Definitions	Groupings	
Saved List Definitions		
Saved List Definitions	Group by Then by	

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

ailable Lists	Principal's List
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 IO Card Report IV lists Future Siblings List Who was enrolled as at?	Include Basic details only Photographs Care givers Enrolment details Renamable categories Sensitive information Medical details Timetable options MOE details Pupils per page / column 1 per column

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
	Biblo (Bib)lo) ABaggi	ns					
	Year: Form: Group: Geider: Date of birtù: Type: House:	9 9,A W 1 Male 01,01/1999 Regularstude	ıt	Hobbit I Hobbito				
Caregivers								
Caregiver Namie Mother ABagginis		Address	ole, Hobbilto I		Home Phone 123456	654321	hone	Cell Phone
no dei ∧bagg∎o		Independent			123400	004021		
Enrolment Details								
Enrolment No.:	07.013			Date fir	st started:	01/	01/2004	
Previous School:				Date fir	stattended:	07/	02/2007	
R enamable Catego								
Category Mo E other back			Column 2		Column 3		corumn	4
			-					
Medical Details [Doctor:] (lot specifi Timestable Details								
Enrolment No.: Previous School: R enamable Catego Category MoEetsichtes 1 Hostil Medical Details	Colum n 1 Notstated Hewett		Column 2	Date fir				4

Figure 441: A Principal's list page

Family address lists

vailable Lists	Family Address Lists
Principal's List Panily 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	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:
Group Photo Report Barcode Report ID Card Report Iwi lists Future Siblings List Who was enrolled as at?	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.

Figure 452: Family address lists

Family Roll	Based on address			Date printed: 02/03/07				
ABaggins				ABaggins		Hama	Wark	Cell
Biblo	9	9.6	W1	Habbithala	Mathar	123456	654321	1
				Halabitan				
Ařai	1	1	1.00	Mr & Mrs Aifai mail to		Hama	Wark	Cell
Ame Rebecca	11	Y11	83	5 Andrew Street	Mathar	8357313	844 4620	
		_	_	Napior mail to	Father	8357313	844 48 20	
						8358007		
Atken				Mr & Mrs Aitkon mail to		Hama	Wark	Cell
Jessica Michelle	11	Y11	W2	42 Menin Road	Mather	843.0557	843.0557	Salari
			1.00	Onokawa mail to	Father	843 0557	8340098	
		+		Nacior		8433 453	and the second stream	
		_		1980 print		service read		
Abet				Mrs Albert MailTo		Hama	Wark	Call
Shuri Ashleigh	10	10.P	W12	18 Ward Crescent	Mathar	0273430575	1	1
				Napior Student	Guardian	843 8009		
			-					
Allen				Mr & Mrs Allen		Hama	Wark	Call
Susannah	10	10.K	WS	13 Sheehan Street	Mathar	8367404	0210738365	
				Bay View	Father	8367404		
				Napior		845 1956		
				64 64 6 6 64		11	1011 1	- 11 - 11
Alen	1.1.0	1.0.2	1.2.02	Mrs Maplesden-Allen Mail		Hama 0210716268	Wark	Cell
Ayla Briese	10	10.T	MI7	4A Outram Street	Mathar			
		_	_	Ahuriri Mail To	Father	0212104255 8337189		
				Napior		0.0.0 1 10.9		
Al-Samman				Mir Cocker and Mrs Al-Samman		Hama	Wark	Call
Lauren	10	10.T	1/4	107 Shakespeare Read	Mather	835 5254	131415	0211367368
	1.4	1.52.1		Napior	Father	835 5254		02102219950
-		-	_	· mala and				
Andersen				Mr & Mrs Anderson		Hama	Wark	Call
Sasha Kim	10	10.H	85	G/- Past Ofice	Mathar	8783868	876 2402	
				Pakowhai	Father	8783868	879 7928	
				Napior		875.0665		
Anderson				Mr & Mrs Anderson		Hama	Wark	Call
Sarah Louise	10	10.R	A2	12.7 Wharerangi Road	Mathar	8449933	8447264	
				Napior	Fathor	8449933	876 4958	
						8778567		

Figure 463: Family address lists

An example of a partial family address list, where the emergency caregiver is highlighted in yellow.

Caregiver/Electoral Rolls

ailable Lists	Caregiver and Electoral Lists
Principal's List Family Address Lists Guardian List Renamable Category Lists Ages / Birthday Lists Caregiver Flag Lists Popup File Lists Medical Lists Medical Lists Pupil Address Lists Random Groups Print Labels Picture Report Group Photo Report Barcode Report ID Card Report ID Card Report ID Card Report ID Card Report ID Card Siblings List Who was enrolled as at?	Format Caregiver mailing labels Student caregiver list Student caregiver mailing labels Number voting papers Initials on firstname Initials on firstname Flag set Voting rights Flag set All caregivers Pre-enrolled Constraints Iz/12/1990 Pupils who started Enable print to text file
	Font: Arial

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

vailable Lists	Renamable Category 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?	Categories Items MoE ethnicities House Old ethnicities Academic T Activity Week Category 6 Category 7 Cultural Activs Hobbies In Cultural Activs If no Item selection is made, records with blank entries will be sought. If the 'include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. Columns If no Item selection is made include blanks' box is checked, records with blank entries will be shown. If no Item selection is made include blanks' box is checked, records with blank entries will be shown. If no Item selection is made include blanks' box is checked, records with blank entries will be shown. If no Item selection is made include blanks' box is checked, records with blank entries will be s

Figure 485: Renamable category settings



Ages/Birthdays 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 D Card Report ID Card Report IW lists Future Siblings List Who was enrolled as at?	 Born after: 23/10/1990 Born before: 23/10/2008 Born between the above two dates Born in month: October ♥ Age at: 23/10/2008 Sort by date Show Year Form House
--	--

This list can be used to identify those of a particular age or birthday.

Figure 496: Age / birthday settings

Caregiver flag 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	Caregiver Flag Lists Invoices Include Show caregiver postal address Show student's Form Show student's Form Show student's House Look for Yes No Either
Who was enrolled as at?	Font: Arial

Figure 507: Caregiver flag list settings

Popup file lists

lable Lists	Popup File Lists
cipal's List	Categories Items
y Address Lists giver and Electoral Lists	make sure I keep up 🔥 🗹 Clutha
rdian List	💻 🗹 Hurunui
mable Category Lists	Accepting school name 🗹 Manawatu
s / Birthday Lists	Another School next y 🗹 None
egiver Flag Lists	Assistance approval 🗹 Otaki
up File Lists	Attainment Level 🗹 Rakaia
ical Lists	Awa 🗹 Rangitata
Address Lists	Before beginning an ui 🛛 🗹 Waikato
dom Groups	Before beginning an ui 🛛 🗹 Waimakariri
Labels	Before beginning an ui 🛛 🗹 Waitaki
re Report	Benchmark A - Catego 🛛 🗹 Waitara
o Photo Report	Billing status 🛛 🗹 Whanganui
ode Report	Birth CBenchmark A - Category
ard Report	Boarding Code
sts	Boarding Status 🖌
re Siblings List	
was enrolled as at?	Selected Awa
	(Small popup list. All items are listed.)

Figure 518: Popup file list settings

Medical lists 🕌 Special Lists Available Lists Medical Lists Principal's List Include Family Address Lists Caregiver and Electoral Lists All students in filter Guardian List Renamable Category Lists Only those with entries in: Ages / Birthday Lists Hearing / vision / speech Medical conditions Caregiver Flag Lists Popup File Lists Immunisations Medical Lists Pupil Address Lists Accident register notes Random Groups Extra notes Print Labels Picture Report Group Photo Report Page break between each student Barcode Report ID Card Report Iwi lists Future Siblings List Who was enrolled as at...? Font: Arial ~

Figure 529: Select required medical condition

Pupil Address lists

Available Lists	Pupil Address 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	 Show pupil address Show primary caregiver address
Pupil Address Lists Random Groups Print Labels Picture Report Group Photo Report Barcode Report ID Card Report IW lists Future Siblings List Who was enrolled as at?	
	Font: Arial

Figure 530: Address list settings

Student Labels

vailable Lists	L7161,38161 (6 x 3)
Principal's List Family Address Lists Caregiver and Electoral Lists Guardian List Renamable Category Lists Ages / Birthiday Lists Caregiver Filog Lists Poopo File Lists	Columns Bons 3 1 Number 6 1 Rons 5 Saparation 1 Separation 1 Separation 5 Width 40 Hotyle Hotyle
Medical Lists Papel Address Lists Random Groups Prot Lacke Prot Lacke Orouge Photo Report Seconde Report Seconde Report Di Card Report Juni kits Future Sikings List Who was enrolled as at?	(int the label bootes: forder colour [cm col(3)] (cm col(1)) [cm col(2)] [cm col(2)] [cm col(2)]
	Font: Arid
	Foot: Arial
aved List Definitions	Groupings
7161,38161 (6 × 3) 7068,17168,38168,17768 (2 × 1)	
7161,38161 (6:X 3) 7068,27168,38168,27768 (2 × 1) 7069,27169,38169,27769 (2 × 2) 7073 (5 × 2)	Groupings
7161,35161 (6 × 3) 7068,L7168,38168,L7768 (2 × 1) 7069,L7169,38169,L7769 (2 × 2)	Groupings Group by then by None Voter States of St

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")}"
```

Barcode report

The barcode report produces class lists of students and their barcodes.

Principal's List Family Address Lists Caregiver and Electoral Lists Guardian List Renamable Category Lists Ages / Birthday Lists Opup File Lists Medical Lists Pupil Address Lists Random Groups Print Labels Picture Report Group Photo Report ID Card Report Iwi lists Future Siblings List Who was enrolled as at?	Available Lists	Barcode Report	
	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 Jivi lists Future Siblings List	 Use first names Use preferred name Two lines Single line Include Year Form House Enrolment number Photo 	

Figure 552: The barcode settings

Iwi Lists

musac

ailable Lists	Iwi lists	
Principal's List	Iwis	
amily Address Lists	Aotea	
Caregiver and Electoral Lists Suardian List	Ngä Rauru	
auardian List Renamable Category Lists	Ngäi Tahu / Käi Tahu	
Ages / Birthday Lists	Ngäi Tai (Tauranga Moana/Mätaatua)	
Taregiver Flag Lists	Ngapuhi	
Popup File Lists	Ngäti Apa, area unspecified	
Aedical Lists	Ngäti Awa	
Pupil Address Lists	Ngäti Haua, region unspecified	
Random Groups	Ngäti Kahungunu, region unspecified	
Print Labels	Ngäti Porou	
Picture Report	Ngäti Raukawa, region unspecified	
Group Photo Report	Ngäti Ruanui	
Barcode Report	Ngäti Toa, region unspecified	
D Card Report	Ngäti Tüwharetoa	
wilists	Ngäti Wai	*
Future Siblings List Who was enrolled as at?	Select All Exclude iwis wit	
	Font: Arial	

Figure 563: The iwi list settings

Future Siblings List

Arges / Birthday Lists Images / Birthday Lists Caregiver Flag Lists Images / Birthday Lists Popup File Lists Images / Birthday Lists Aredical Lists Images / Birthday Lists Pupil Address Lists Images / Birthday Lists Random Groups Images / Birthday Lists	
Barcode Report	/ val Date / Sibling's Family / Sibling Name ing's family / sibling name æ of Birth / Sibling Name

Figure 574: The Future Siblings settings

Who was enrolled as at?

vailable Lists	Who was enrolled as at?
Principal's List	
Family Address Lists	
Caregiver and Electoral Lists	
Guardian List	February 2005
Renamable Category Lists	
Ages / Birthday Lists	Mon Tue Wed Thu Fri Sat Sun
Caregiver Flag Lists	31 1 2 3 4 5 6
Popup File Lists	7 8 9 10 11 12 13
Medical Lists	14 15 16 17 18 19 20
Pupil Address Lists	21 22 23 24 25 26 27
Random Groups	28 1 2 3 4 5 6 7 8 9 10 11 12 13
Print Labels	1 0 3 10 11 12 13
Picture Report	C Today: 23/10/2008
Group Photo Report	c1
Barcode Report	Show
ID Card Report	Year level
Iwi lists	Form
Future Siblings List	Group Sort by da
Who was enrolled as at?	
	Font: Arial

Figure 585: The Who was enrolled as at \ldots ? and settings

19.6 Tables

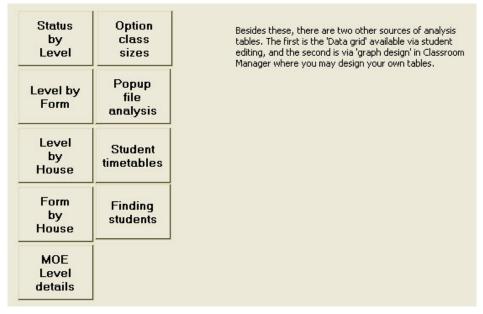


Figure 596: The table printing options

Status by level

The first step in generating a table is to make the decisions offered on the following screen.

Status	 Include O All students O Apply a filter 	Which Year? This year Next year
by Level	Print format Portrait Landscape	Year-Level Type Academic year MOE Year
	Generate the Table	

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.

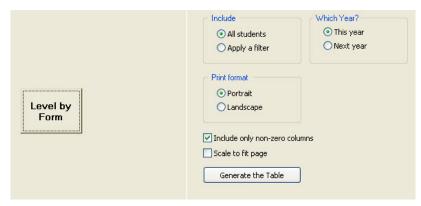


Figure 618: A Level by Form/Class selections

An example of a Level by Vertical Group table is shown below.

Level	Yea	r 7	Yea	ar 8	Yea	ar 9	Yea	r 10	Yea	r 11	Yea	r 12	Yea	r 13	Yea	r 14	Yea	r 15		Totals	
House	м	F	м	F	м	F	м	F	м	F	м	F	м	F	м	F	м	F	м	F	Т
Unknown										1			1		1	1			2	2	4
adul																3				3	3
boy																					
DUN		9		7		49		61		56		33		29						244	244
MALT		12		6		44		50		51		31		31						225	225
MAUN		8		6		56		50		56		27		39						242	242
VVAI M		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
Х																					
XXXX			5			7			8	2	20	2	24	2		1			57	14	71
Y																					
Totals		42	5	26		23		26	8	26	20	17	25	17	1	5			59	118	124
						8		1		0		9		7						8	7

Figure 629:		by Fo	rm/Class	/Group	table
1 iyure 027.	ALEVEI	Dyru		/ Group	lable

Level by Group/Tudor (Horizontal)



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.

Print format	
Portrait Olandscane	
Generate the Table	1
	'
	OLandscape

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.

ption	1. Select option set
ass zes	2008 First Choice Options 2008
	2. Select level
	Kndergaten J1 X2 Standerd 1 Standerd 2 Standerd 3 Standerd 4 Form 1 Form 2 3. ♥ Select from ourrent filter (else totals include leavers etc.)
	4. Pirit format O Portrait O Landscore
	5. Generate Table

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.



	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	
	Туре	Туре	
	Special Education	Special Education	
	Status	Status	
	Relationship1	Relationship	~
	Include	Print format	
	 All students 	Ortrait	
	O Apply a filter	O Landscape	
	Include only non-zer	o columns	
	Generate T	able	

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						
	O All on one line						
	Print format						
	 One timetable per page (portrait) 						
Student timetables	 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.

	Apply a Filter	Student	Y
	Select All	24011-0148-1 24020011108-10080-0 240200141-0148-1	
	Print order	AMERICAN, Manager, 1 AMERICAN, Manager, 1 AMERICAN, MANAGER, 1	
	 Alphabetical 	principal, Staphaner H	
1	O By year	manufr. cumbe in	
Student	O By Form	Sales Anna -	
timetables	O By House	barrage 11, Aller and he 12	
	O By room	Million, Specif	
	None selected	Ministri, Savati I Ministri, Savati I Ministri, Savati I	
		Automatic Street	
	Generate timetables	<	>

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.

	Select Day	Select period
	💿 Monday	Period 1
	🔘 Tuesday	O Period 2
	🔘 Wednesday	O Period 3
	🔘 Thursday	O Period 4
	○ Friday	O Period 5
	ODay 6	O Period 6
	ODay 7	O Period 7
	ODay 8	O Period 8
	ODay 9	O Period 9
1	ODay 10	O Period 10
Finding students		
	Select Stud	lents

Figure 707: Selection of the day and period

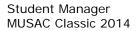
Once you have decided on the day and period, select the students whom you wish to find, using a screen similar to that for timetable printing above. The screen is shown below.

		Student	Year	Form	~
	Apply a Filter	ALABASTER, Kathryn I	9	9TC	
		AMEY, Emily J	13	13PM	
		ANDERTON, Helen E	9	9TC	
	Select All	ANDREWS, Emily V J	12	12BE	
		ANDREWS, Phoebe L J	13	13PM	
		ANSTIS, Elizabeth C	11	11AH	
	Print order	ANSTIS, Olivia Kate	9	9TC	
	O 1 1 1 1 1	ATMORE, Stephanie M	10	10JF	
	 Alphabetical 	AYLING, Kate E	11	11AH	
	O By year	BAILEY, Katelin A	10	10WO	
		BAKER, Emma L	13	13PM	
	O By Form	BALLINGER, Tessa M	10	10TB	
	O By House	BARNETT, Alexandra G	10	10JF	
Finding students	U by House	BARRY-GOSS, Hannah E	10	10WO	
	O By room	BEISSEL, Dana C	12	12BE	
		BENNETT, Sarah P	11	11AH	
	None selected	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	
	Search for students	POMINION Apparatel W		OTC	1
	students	<		>	

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

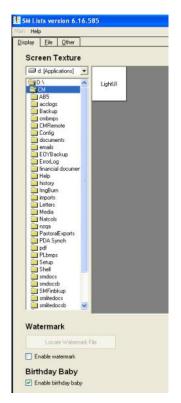


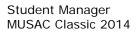
Figure 729: Environment settings

Note: If you are experiencing problems with performance speed the watermark should be unticked 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

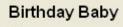
Several alternative colours can be found in the \cm\plbmps subdirectory. These are from the CMPlanner module. If you have this package installed then its colours will be available to you. The selection screen is shown below.





'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.



Enable birthday baby

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.

Sounds
Enable sounds

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.

					×
Option	ns	NZQA Standards	Schools		Activities
Years Forr	ns Houses	Gender, Place & Ethnicity	Columns		Mark Books
Years	Selected Form	ns Selected Houses	Status	Туре	
Year 0 Year 1 Year 2 Year 3 Year 4 Year 5 Year 7 Year 7 Year 8 Year 9 Year 10 Year 11 Year 12 Year 13 Year 14 Year 14	10JF 10TB 10W0 11AH 11BG 12BE 12LE 13AW 13PM 9PE 9TC	BARK BIRH SPRT STUD	Full time Patt time Leaver Pre-enrolment Delete Reset the filter to just Full and Part time students	Internat Internat Externa Regular Not atte Returnin Student Student Student Stellite Teen P Return.	student ional Fee-paying student ional Exchange student student Adult student Adult student in Alternative Education in separately funded unit at a Kura Teina (Developing I class student arent regular > max. roll arent regular > max. roll adult att. teen p. unit elig.+ enrolled regular
🔲 Select individua	ls from all studer	nts 🛛 🔲 Select individuals from curr	ent filter		
Sample Filter		🔽 🖳 💭 🔛 🕻	Apply		Save Cancel
Unspecified Sample Filter					

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.

Surname 🛆	Preferred Name	Year	Form	House	Gender	Status	^
add(), 715.	Eleabeth	11	11AH	BARK	Female	Full time	
415,86	K alte	11	11AH	BIRH	Female	Full time	
BENNETT	Sauth	11	11AH	BIRH	Female	Full time	
BRAUSCH	Shavenee	11	11AH	BARK	Female	Full time	
BRENNAN	Agreen	11	11AH	STUD	Female	Full time	
PURI.	Large	11	11AH	SPRT	Female	Full time	
RUPINEY	Wagan From	11	11AH	STUD	Female	Full time	
CALDER	C uniaño	11	11AH	SPRT	Female	Full time	
CHEE Truster	Sauth	11	11AH	STUD	Female	Full time	
COLEMAN	Whitep	11	11AH	SPRT	Female	Full time	
ONNOR	Form	11	11AH	BARK	Female	Full time	
08H	Brooke	11	11AH	SPRT	Female	Full time	
PROVIEY	Chelofina	11	11AH	BIRH	Female	Full time	
DENNER	Canifre	11	11AH	STUD	Female	Full time	
DRIVER.	Generation	11	11AH	STUD	Female	Full time	
EDMOND'S	Antes	11	11AH	BIRH	Female	Full time	~
Select individu	uals from all students	🗹 Se	elect ind	ividuals fi	om curren	t filter Ra	andom
Sample Filter			~ (Apply Save Car	ncel

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.

Random Selection	×
Enter the number of students for random selection (A number between 1 and 96)	OK Cancel
20	

Figure 784: Selecting a random group

You can arrange to view just the selected records by ticking the Show only selection check-box.

							×
Surname 🛆	Preferred Name	Year Form	House	Gender	Status		~
4N5715	Eloabeth	11 11AH	BARK	Female	Full time		
BENNETT	Sauth	11 11AH	BIRH	Female	Full time		
BRAUSCH	Shaveen	11 11AH	BARK	Female	Full time		
FINLA/SON	Sight	11 11AH	STUD	Female	Full time		
MARKED.	Annabal	11 11AH	STUD	Female	Full time		
HAPETA	Callin	11 11AH	STUD	Female	Full time		=
HARWOOK THE	Enma	11 11AH	BARK	Female	Full time		
JACHE	Anothelia	11 11AH	SPRT	Female	Full time		
KANE	Grace	11 11BG	BIRH	Female	Full time		
LAWPENCE	Eloabeth	11 11BG	BIRH	Female	Full time		
USSING/10N	Arra	11 11BG	BIRH	Female	Full time		
MARKETSH	LamX	11 11BG	SPRT	Female	Full time		
NACION:	Grant	11 11BG	BIRH	Female	Full time		
PESCINI	Lauren	11 11BG	BARK	Female	Full time		
MGOTT	Any	11 11BG	SPRT	Female	Full time		
ADSS	Enna	11 11BG	SPRT	Female	Full time		~
Select individu	als from all students	Select ind	ividuals fr	rom curren	t filter	Show only selection (20)	Random
Sample Filter		~ (2)	Apply Save	Cancel

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.

AP	Quick Entry Action Completed		Activi Mark B () Years Forr	ooks	Options Gender, Place & Ethnicity	NZQA Stand Columns		Schools Type
PLY FILTER	Print Pastoral Lists Pastoral <u>U</u> tilities User Specific Defaults		Years Year 9 Year 10 Year 10 Year 12 Year 13 Year 13 Year 14 Year 15	Selected Form 10EL 10JO 10MA 10WA 11ED 14A 9FA 9FA 9GS 9PA	\$	Selected Tutors	Status Full time Part time Leaver Pre-enrolme Delete Reset the I Full and I stud	filter to just Part time
	Pastoral <u>C</u> onfiguration Pastoral <u>D</u> ocument Design	Арр	ly this Filter	Cancel Selectio Redisplay all St				

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.

ABaggins, Biblo 9 9.A Total Transactions : 2 Total C		Kerit Points : 0 Net To	Next >> Date	columns Show All
No. / Date Teacher 1 21/02/2007 Z, Z 2 1/03/2007 Z, Z	Type Detail1 Offence Late - not signed in Offence Default offence		ts2 Action	Complete? N/A N/A
		column click on To view the c mn header individual tran	complete details of an nsaction double click it.	

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.

	Offence O Mer	it 🔘 Support			
Date	22/11/2011 *	Time			
Teacher		*			
Location					
		Points			
Offences and points					
Possible motivation					
Comment			•		
Action			r		
	Action completed 🔘 Yes	No ONO Not applicable			
Action comment			×		
Document					
Other					
Time taken	Minutes				
taken					
< <u>B</u> ack	<u>N</u> ext >>	Delete	Copy To Print	Apply	ОК

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.

Pastoral	transaction detail for BRAKUS, Stephen 10 Yr10 FC3
	Offence O Merit O Support
Date	22/03/2012 * Time
Teacher	MITH, JOHN *
Location	Points Offences
Offences and points	Points Offences Default offence
Possible motivation	
Comment	MUSAC Classic 2012
Action	Please select the required entry from the displayed list. New entries may be added via Pastoral Configuration.
Action comment	Action comple

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.



BRAKL	JS, Stepher	n 10 Yr1	0 FC3	•	<< <u>B</u> ack	Next >>	Show / I Type	hide columns	Show All			
Tota	al Transao	ctions:2	Total Offence Points : 0	Total Merit Poi	nts:0 N	let Total Poi	nts : 0					
No. /	Туре	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.

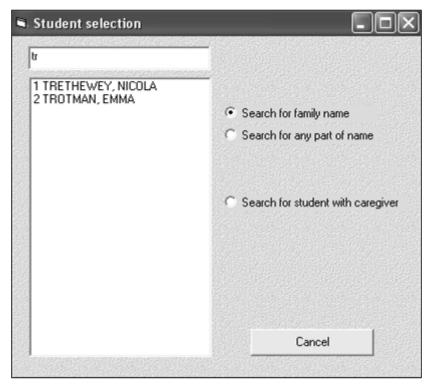


Figure 261: Searching for another student - method 1

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.

ABACROMBIE CAMPBELL, C CAMPBELL, C CAVU, TEEN, CHAINEY, LA CHRISTIE, KA CHRISTIE, MI CLARK, BRU(DUANE 1 SRANT 9 A 13 13 ITE 13 AREN 11 CHAEL	1 9HU SK 13SK 13 135	G long VF4 SK VF1	 vints :
CLARK, PHILI	_IP 10			~

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.

Date	25/06/2004			
Teacher	Davenport, Dennis	Points		Offence .
Offence and Points	Stealing	4		Merit C Support C
Comment	Took the apple from my desk	<u>^</u>		
Action	Detention	Action completed		
Action Comment	Must bring me a new apple tomorro	ow (Granny Smith)		
ocument	Letter sent home			
Other		Time taken 7	minutes	<u>P</u> rint a document
	<< Back	Next >> Delete	Save	Cancel

Figure 263: The repeated transaction

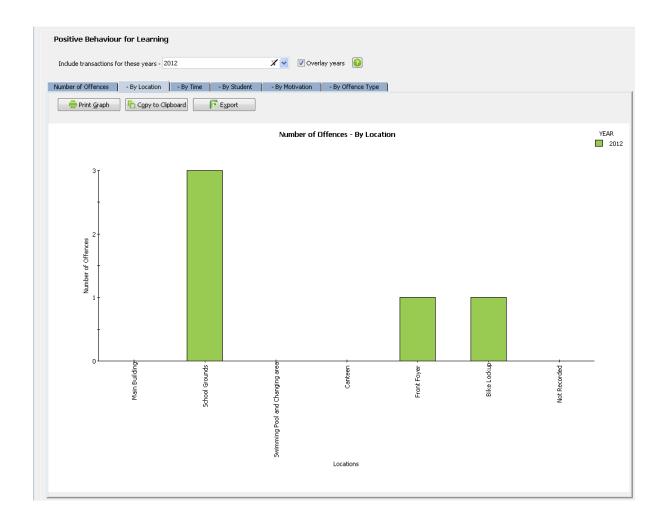
20.3 Offence data PB4L Graphs

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.

Positive Behaviour for Learning									
Include transactions fi	or these years -	2013		X 🗸 🔽 Over	lay years 🔞				
Number of Offences	- By Location	- By Time	- By Student	- By Motivation	- By Offence Type	- By Teacher	- By Action		
Print Graph	Copy to C	lipboard	Export	Average offer	nces per day per month	Offences p	er month		

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.

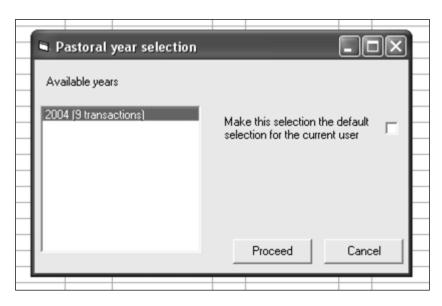


Figure 264: Selecting a different year

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.



A	BACROM	ibie, jimmy	, ,	4 9HG Ion	ıg					
										_
т.	4-1 T		T-+-					- i - i - i	NI-L T-L-I	D - 1 - 1
Тс	otal Trans	actions : 1	Tota	al Offence Po	oints : 4	Total M	erit Poir	nts : 0	Net Total	Point
_			Tota	al Offence Po						
To No		actions : 1	Tota ^{Type}	Detain		Detail2				Point
_							Pts			
_). Date		Туре				Pts			

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.

Documents available	
past1.dmt Pastoral.dmt	
	Either:
	Click on a document to select it and load the printing routine
	OF:
	Click the button below to return to the student's transaction.
	Exit without printing

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.



smpastoral	
The transaction just altered/entered has not yet been saved. Do you wish to save it now?	You may not print a document unless you save the transaction.
Yes	No

Figure 267: Saving the current transaction

Finally, you will arrive at the document preview screen, shown below.

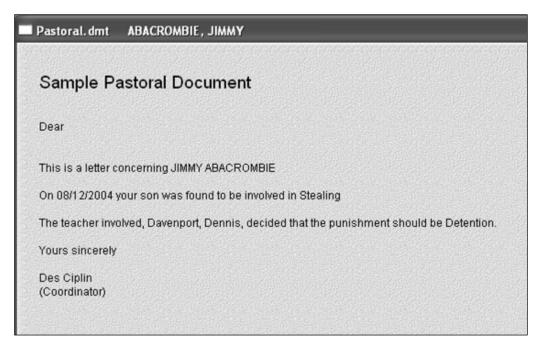


Figure 268: The document displayed

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.

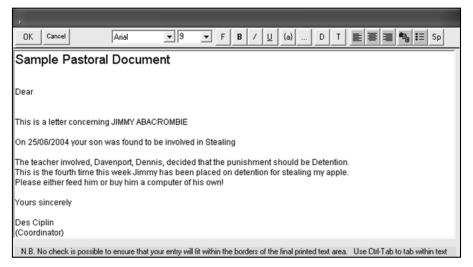


Figure 269: Editing the document

Once you have completed your alterations, click **OK** and the new version will be displayed, as shown below.

Sample Pastoral Document
Dear
This is a letter concerning JIMMY ABACROMBIE
On 25/06/2004 your son was found to be involved in Stealing
The teacher involved, Davenport, Dennis, decided that the punishment should be Detention. This is the fourth time this week Jimmy has been placed on detention for stealing my apple. Please either feed him or buy him a computer of his own!
Yours sincerely
Des Ciplin (Coordinator)

Figure 270: The edited document

Once you are satisfied you have a choice of two buttons at the top of the screen.

Printing	-
ontions	2011 N 21
options	~ µ

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.



🖬 Pas	toral printing opt	ions		- D ×
Youł	have the following optic	on available for this	s letter	
۰F	Print only			
C F	rint and file			
O F	Print, file and email to th	e following caregi	vers (please select)	
1	Caregiver		eMail address	Send
	Mr John ABACROMBI	E	johna@paradise.net.nz	
	Mrs June ABACROME	BIE	junea@paradise.net.nz	
Sc	hool email address			
	hool email address .g. smtp.xtra.co.nz			
em	ail message	Please find att {cm.col(3)}.	ached a document relating to	o your {cm.gs("son")},
			ocument you require Acroba downloaded from	t Reader, a free copy of
			Cancel	Proceed

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)



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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.

Name: hp deskjet 990c	 Properties 	
Driver: UNIDRV.DLL	DPI: 300	
Where: LPT1:		
^o rint range	Print for Print I	
• Al	C All students in current filter 🛛 🕤 All	
	Current student	
OPages from: 1 to: 1	C Design Mode (no students)	
Current Page	Orientation	oop
Restrictions		
Include labels		
Include frames	Emergency font over-ride	
Include hidden objects	Settings here will apply only to comments. These settings are NOT permanent. Please select BOTH settings.	
Add top and left margin	Font name Font size	Italic
	Select 💌 Select 💌	
Copies		- 2123382
Number of copies: 1	Print Cancel	

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.

Back B					
ddress 🛅 C:\CM\letters					
olders	×	Name	Size	Туре 🔺	Date Modified
Hillcrest	^	🔁 pdf		File Folder	16/02/2004 12:18 p
imports		12300001_1602041603_Pastoral16022004160321.pdf	3 KB	Adobe Acrobat Doc	16/02/2004 3:03 p.m.
🗆 🧰 letters		12300001_2506041358_Pastoral25062004135800.pdf	3 KB	Adobe Acrobat Doc	25/06/2004 1:58 p.m.
🗉 🗀 pdf		13600540_1802041255_Pastoral18022004125520.pdf	3 KB	Adobe Acrobat Doc	18/02/2004 11:55 a
🗉 🦳 media					

Figure 274: The document in the \letters subdirectory

If you wish to have the document printed, filed and emailed then:

- a Select one or more of the caregivers listed. (Only those with email addresses will be offered.)
- b Specify your school's email address ie. the address from which the email is being sent probably your own....
- c 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.
- d Specify any covering message which you wish to form the basic message of the email.
- e 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.

Date	Action	Action Completed		Comment	
Transactions bet	and 31/12/2004	_ 1		Eind transactions	S <u>a</u> ve changes
	Transactions bet	Transactions between dates	Date Action Completed Image: Completed Image: Completed Image: Completed Image: Completed Image: Completed Ima	Date Action Completed Image: Display which transactions Image: Display which transactions	Date Action Completed Image: Comment in the second

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.

SM Pastoral Selection	- DX
Offence Actions	
Detention Default offence action Step 1 Step 2 Time Out Step 4 Step 5 Detention completed Suspension Expulsion Interview with Dean Interview with DP Interview with Principal	

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.

ı desk		~	
		v	/
	Action c	ompleted 🔽	4
ple tomorrow (Gra	anny Smith) Com	pleted on \land	
		~	
)6/2004 Pastoral.	dmt - 25/06/200	14 past1.dmt -	

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.

Printed: 20/02/2007 at 14:06	Just list points Points < -20 (Calc Nt Pts)	Page 1
	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

Pastoral List Options	List includes
Just list points (SM Full only) Summarise transactions Provide full details Tabulate by teacher Tabulate by item/teacher Export transaction details Scan for referenced date Count actions by student Actions by teacher + student details	Offences Merits Supports Incl. only specified offences Incl. only specified merits Actions Incl. only specified supports Actions Net pts / student List transactions between
Print by	01/01/2010 and 01/04/2010
Full school Year level	Just <u>T</u> oday's Transactions
Form	Just This <u>Y</u> ear's Transactions (2010)
OTutor	All Transactions in Database
Print List	List just those with any v transactions
	Show zeroes as blank spaces Show sections with no transactions Use shading on report 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.



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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.

Default utility va Default points Default date	lues 1 25/06/2004
Access transac Year	
Changes made	by : MUSAC MUSAC
	ecommended that you make a backup. cold : 19/02/2004 12:09:17 p.m.
	Default points Default date Access transac Year Changes made

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.



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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 MUSA	4C		
- Steps reduction chart			
di seconda de la companya de la comp	Reduce	To	^
reductions which you wish	1	1	
		1	
		1	
column will have their total		-	
reduced to the number of		-	_
	6	2	*
column.	Reduce higher p	oints by	0
Reduction details			
Code Vandalism	•		
Applies to points between dates 25	5/06/2004 and	25/06/	2004
	Default points 1 Default date 25/06/2004 Access transactions for Year : Year Year 2004 Changes made by : MUSAC MUSA 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. Reduction details Code Vandalism	Default points 1 Default date 25/06/2004 Access transactions for Year : 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 higher p Reduce higher p Reduce higher p	Default points 1 Default date 25/06/2004 Access transactions for Year : 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 higher points by Reduce higher points by

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 selfexplanatory 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 deletes

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.

Reduction check by default Complex reduction by varying Reduction check by default	g points (Cha			
Remove ALL transactions!!!				
Global change of action betw	ween two dat	es		
Proposed change				
Reduction check by default (Chances)	points			
Any students with no offenc 25/06/2004 and 25/06/200 have points) will be credited points.	04 (and who			
,	Proceed	<u>C</u> ancel		

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	_ Default utility values	
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	Default points 1 Default date 25/06/2004	
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	□ Global action change between 25,	/06/2004 and 25/06/2004
Reduction check by default points (Chances) Complex reduction by varying points (Chances) Reduction check by default percentage	From Detention	to Expulsion
Remove ALL transactions!!!	From Detention	To 🔨
Global change of action between two dates		
		~
	<	
	Pause to approve each student	individually 🔽
	Global changes apply to Offences 🔽 Merits	
Proceed to change	Applies between dates 25/06.	/2004 and 25/06/2004

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.

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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.

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.	Accumulate transactions/points - C Displayed years only C All years	Choose how you would lik the transactions and point accumulated, e.g. carried over across all years ever though not all years are displayed
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	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.

Offences	Points	Def	^	Insert a new row
Annoying others	0	~		
Breaking Road Rules	0			Dalata calcutad com
Bullying		0 🗆 👘		Delete selected rows
Default offence	0			an a
Fighting	0			Move selected row up
Gambling	0			presidente de la companya de la comp
Hitting	0			Move selected row down
Inappropriate touchi	0			
Kicking	0			Move selected to top
Leaving School groun	0	0 🗆 🚬		more selected to jop
Not following Instru	0			Alababataalaadaa
Not in right place	0			<u>Alphabetical order</u>
Not keeping hands/fe	0			
Punching	0			Print this list (Offences)
Pushing	0			l <mark>y</mark> aan maraas kaan maraas
Spitting	0			Print ALL lists
<u> < </u>		>		2
Clicking in the Default column will	set that particu	ılar er	ntru to	
Save Defaults (Offences)	Exit without	savi	na	
	Annoving others Breaking Road Rules Bullying Default offence Fighting Gambling Hitting Inappropriate touchi Kicking Leaving School groun Not following Instru Not in right place Not keeping hands/fe Punching Pushing Spittion	Annoying others 0 Breaking Road Rules 0 Bullying 0 Default offence 0 Fighting 0 Gambling 0 Hitting 0 Inappropriate touchi 0 Kicking 0 Leaving School groun 0 Not following Instru 00 Not keeping hands/fe 0 Punching 0 Snitting 0 Clicking in the Default column will set that particut the default and uncheck any previously checked	Annoying others 0 Breaking Road Rules 0 Bullying 0 Default offence 0 Fighting 0 Gambling 0 Hitting 0 Inappropriate touchi 0 Kicking 0 Leaving School groun 0 Not following Instru 0 Not keeping hands/fe 0 Punching 0 Pushing 0 Schittion 0 Versition 0	Annoying others 0 Breaking Road Rules 0 Builying 0 Default offence 0 Fighting 0 Gambling 0 Hitting 0 Inappropriate touchi 0 Kicking 0 Leaving School groun 0 Not following Instru 0 Not keeping hands/fe 0 Punching 0 Pushing 0 Scitting • Clicking in the Default column will set that particular entry to the default and uncheck any previously checked entry.

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.

past1.dmt Pastoral.dmt	
Design a <u>n</u> ew document	 A4 - full size A4 - two per page A4 - three per page
Edit selected document	

Figure 288: Selection of a document

🖷 Pastoral. dmt	
Save 🖻 Print Preview	Data assistant Options Exit Doc
TOOLS General	
A 🖸 🔛 e 🖂 🗖	Sample Pastoral Document
₽ ~ ₩ ** 66 5	Gest/cm sm/"2"\\
\$ 🎱	
Properties	This is a letter concerning (cm.col(3)) (cm.col(1))
	On {cm.pastoral("0")} your {cm.gs("son")} was found to be involved in {cm.pastoral("2")}
	The teacher involved, (cm.pastoral("1")), decided that the punishment should be (cm.pastoral("9"))
	Yours sincerely
	Des Ciplin (Coordinator)

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.

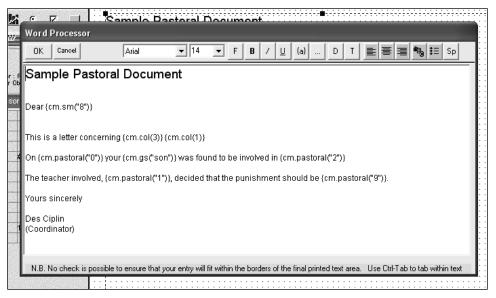


Figure 290: The contents of the word processor

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.

Caregivers	Financials	ancials Activities Pa		Columns	
	apply to a particular pa astoral document printi			s apply to all of a ent's transactions year	
Transaction date	Com	nment	Total pastoral	points	
Teacher name	Acti	on	Total offence	Total offence points	
Detail 1	Acti	on comment	Total merit poi	nts	
Points 1	, Oth	er	Number of offe	nces	
Detail 2	, Time	e taken	Number of me	its	
Points 2			Number of sup	ports	
Detail 3					
Points 3					

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.

Select student	Click document to view	Documents on f	ile : 2
ABACROMBIE, JIMMY (2)	Document	Time	Date
	Pastoral16022004160321	16/02/2004	16:03
	Pastoral25062004135800	25/06/2004	13:58

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.



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To view a letter click on its name in the right hand list and it will be displayed, using Acrobat Reader, as shown below.

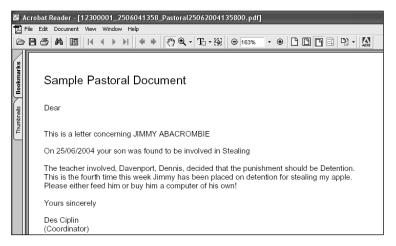


Figure 293: A letter in view mode

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).

6	Student	Manager - Personal notes files maintenance
		Phil
		Create a New Notes File
		Delete Selected Files

Figure 294: The existing files of notes

Click on the 'Create' button for the screen which follows.

Personal N	otes Creation
Step 1	Provide a short name for your notes file Phil
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 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

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.

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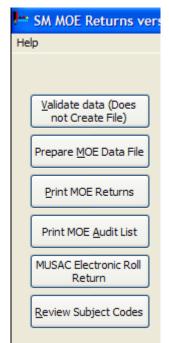


Figure 296: The Ministry of Education returns buttons

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.

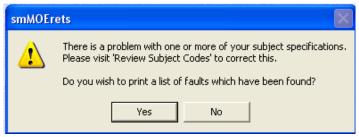


Figure 297: Faults are found in the subject codes area

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.

	Subject Specifications - List of faults found
	No hours specified for 11AC in Accountancy
	No hours specified for 12AC in Accountancy
	No hours specified for 13AC in Accountancy
	No hours specified for 9AT in Art (core)
	No hours specified for 11AT in Art (core)
- :	igure 200. Faulte list found in subject adde

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.

weeks active:	
▼ 20	
• 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 druing the year and how many weeks each set is running for
	Save and continue
	Continue
	 ■ 20 ■ 18 ■ 18

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.

chool number: 148 chool type: Composi	te	MOE Approved Enrolment Schemes YES, we have an approved scheme Effective from
Which Returns?	Active Database: CM (The main database)	 NO, we do not have an approved scheme When unusual data is found
 July Returns 	Leavers Database: CM (The main database)	 Print only those with warnings or errors Print only those with errors
Teacher code for externally st	udied subjects, e.g. CO/XX	C Pause on those with warnings or errors C Pause on those with errors C Don't pause or print
Excluded subjects, e.g. 13STL	1/13STY	
		Save <u>d</u> efaults

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.

chool number: 2647 chool type: Contribut	ing	MDE Approved Enrolment Schemes YES, we have an approved scheme Effective from 01/01/2003
Which Returns?		 ND, we do not have an approved scheme When unusual data is found Print only those with warnings or errors Print only those with errors Pause on those with errors Pause on those with errors Don't pause or print
Excluded subjects, e.g. 13STU	1/13STY	Save <u>d</u> efaults





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.

MUSAC Demonstration 29/11/2003	March Returns Date: 1st March 2004
School number: 3291 School type: Full Primary	
smMOErets Possible faulty data for W	
WARNING5: Student with date of first attendance prior to 1 Jan 2003 has had zoning sta	itus defaulted to 'Not applicable' for MOE returns
OK Cancel]
Validating data - main student data	
<u>V</u> alidate data	
Validating data in C:\CM\cm.mdb	

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.



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.

Porritt School (2647) an William : ERRORS: MOE121 - Date first attended at this school is missing MOE133 - Needs date first started school MOE151 - ORRS code is incorrect - no code specified	Date Pr
ERRORS: MOE121 - Date first attended at this school is missing MOE133 - Needs date first started school MOE151 - ORRS code is incorrect - no code specified	
MOE171 - Student type is missing MOE221 - Student in primary level must be full-time, FTE = MUSAC - Student has no FTE value MOE225 - Student aged <16 at Roll count date must be full-tim MUSAC - Student with status 'Leaver' requires a leaving date MOE301 - Zoning status is not applicable for student whose d MOE616 - Incorrect Zone status for student (). The Zone statu effective date must be NAPP	e date of first attendance is prior to 1 Janua

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.



1		and a second second	NACTOR OF STREET, SACTOR	and the second
X			MOE year	1
	Full time		Foreign Fees Paid	6000.00
	Foreign fee paying stude	ent	Special Ed.	
	1.0		Special Ed. Hours	
	Female	non ORRS		
	Korea - South	ORRS - High level ORRS - Very high leve		
	13/03/1999			Learning Taha Maori
	15/03/2004	1		
	15/03/2004	۱		

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.

	smMOErets 🛛 🔀
	During validation of your C:\CM\cm.mdb database: 0 ERRORS were found and 0 WARNINGS were found
L	OK
	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.

chool number: 2647 chool type: Contribut	ing	MOE Approved Enrolment Schemes (* YES, we have an approved scheme Effective from from
-Which Returns?	Active Database:	C ND, we do not have an approved scheme
	CM (The main database)	▼ When unusual data is found
 March Returns July Returns 	Leavers Database:	• Print only those with warnings or errors
	CM (The main database)	 C Print only those with errors
Teacher code for externally str		Pause on those with warnings or errors Pause on those with errors Don't pause or print
Excluded subjects, e.g. 13STL	J/13STY	Save <u>d</u> efaults

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.

smMOErets 🛛 🔀
During the creation of your MOE returns file:
0 ERRORS were found and 0 WARNINGS were found
You may proceed to print your MOE Returns
ОК

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.

F	Report of Errors and V	Varnings - July 2004 returns
Inter	mediate (3037)	
	:	
WARNINGS: Student with date of fi	rst attendance prior to 1 Jan 2	2003 has had zoning status defaulted to 'Not ar
	:	
WARNINGS: Student with date of fir	: rst attendance prior to 1 Jan 2	2003 has had zoning status defaulted to 'Not ap
Student with date of fi	st attendance prior to 1 Jan 2	2003 has had zoning status defaulted to 'Not ap
Student with date of fir		2003 has had zoning status defaulted to 'Not ap 2003 has had zoning status defaulted to 'Not ap
Student with date of fir		

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.

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musac

SM MOE Returns version	11.8.12 26/10/2011 MUSAC MUSAC MUSAC	AC Demonstration 06/01/2011 C:\ \CM\cm.mdb
Help		
Validate data (Does not Create File)	Printing MOE returns	MUSAC Demonstration 06/01/2011 School number: 1
Prepare MOE Data File	Which returns?	Which tables?
Print MOE Returns Print MOE <u>A</u> udit List	MarchJuly	 J2 - Number of International students J3 - School roll by type and funding year level J4 - School roll by age and funding year level J5 - School roll by age and ethnic group
MUSAC Electronic Roll Return <u>R</u> eview Subject Codes	✓ Include MUSAC logo The logo (being graphical in nature) requires a modest amount of printer memory. If your printer has insufficient memory to include the logo you may exclude it.	 J6 - School roll by funding year level and ethnic group J7 - Highest Level of Maori language learning J8 - Participation in Early Childhood Education J9 - Highest Level of Pacific Medium Education J9 - Highest Level of Pacific Medium Education
	Proceed to Print C	ancel

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.

Printing MOE Returns	MUSAC Demonstration 29/11/2003 School number: 3291
Which Returns? March Returns July Returns	 Which tables? ✓ J2 - Number of overseas students ✓ J3 - School roll by type and year of schooling ✓ J4 - School roll by age and year of schooling
Include MUSAC logo The logo (being graphical in nature) requires a modest amount of printer memory. If your printer has insufficient memory to include the logo you may exclude it.	 J5 - School roll by age and ethnic group J6 - School roll by year of schooling and ethnic group J7 - Highest Level of Maori language learning J8 - Participation in Early Childhood Education J9 - Highest Level of Pacific Medium Education List of possible data faults
Proceed to Print Cancel	
Illustration 17 : The Ju	uly 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.

Printing Possible faults	
smMOErets	
As per Ministry of Education Audit requirements the Full School Roll audit list and the Maori	anguage Resourcing List will automatically be printed.
ОК	

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.

ĺ	smM0Erets
	The Ministry also requires schools to print a set of class/form/whanau lists to be signed by individual teachers and kept with your school's copy of the return.
	Click 'Cancel' if you do not wish to print these lists now. (You may print them later via the 'Print MOE Audit List' button.)
	If you wish to print these lists now, do you want to print by horizontal group?
	YES - horizontal group, e.g. class or form NO - vertical group, e.g. room
	Yes No Cancel

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.

able N	/12			1 March Overseas St	Date 26/06/200			
hool Na	me: MUSAC Demonstration 29/11/20 Name (for audit purposes only)	003 Gender (MorF)	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
	tal Exchange Students				0			
	tal NZAID Scholarship Students				0			
1 KI		F	10/10/1997	KOR	FF	10/11/2003	1	6000.00
2 Y0	ie .	м	15.08/1998	KOR	FF	08/09/2003	1	3000.00
3 CH	on	F	03/12/1996	KOR	FF	28/01/2004	3	6000.00
4 SH		F	03/08/1996	KOR	FF	06/10/2003	3	6000.00
5 BE	helsi Srikand	F	13.07/1995	IDN	FF	26/01/2004	4	3000.00
6 LE		F	05/05/1996	KOR	FF	21/07/2003	4	3000.00
7 HC	ong	M	01/07/1996	KOR	FF	26/06/2003	4	6000.00
8 LE 9 HC		M	11.06/1996	KOR	FF	04/12/2003	4	6000.00
9 HC		F	21/01/1994	KOR	FF	26/06/2003	6	6000.00
10 LE		M	12.03/1994	KOR	FF	28/01/2004	6	6000.00
10 LE 11 LE		F	19.02/1993	KOR	FF	04/12/2003	7	6000.00
12 SH		F	08/11/1993	KOR	FF	06/10/2003	7	6000.00
For	reign Fee Paying Students				12			
GR	AND TOTAL				12			
e tobe/num pe of O∘ EX - Fo FE - NZ	nberofFE studen to mustagnee with the balas nberofFF studen to mustagnee with the tobals verseas Student: reign Exchange Student [AID (Formerly MFAT) Scholarship Stu reign Fee Paying Student	in Table M3 colu	mo 7 mo 8					

Illustration 21 : An example of a printed returns table



L

chool Name: Heretaunga Intermediate																			
		Students Eligible for Ministry Funding									Other Students								
	nt Fulltime Parttime Fulltime Parttime Eligible for Regular Regular Adult Adult Ministry Students Students Students Funding		6 7				8	8	9										
Type of Student Year of			e Parttime r Regular		Fulltime Adult		Parttime Adult		Eligible for Ministry		Alternative Education Students		No. of NZ AID (formerly MFAT) Scholarship Students		No.of Foreign Fee Paying Students		Total No. of Stude		udent
Schooling	Male	Female	Male	Female	Male	Femile	Male	Female	Male	Female	Male	Femile	Male	Female	Male	Female	Male	Female	TOTA
Year 1	11	13							11	13							11	13	24
Year 2	14	7			5				14	7							14	7	21
Year 3	12	20							12	20						1	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		88			3				1	1		2		2		2	2		1
Year 10																			
Year 11																			
Year 12					_														
Year 13																			
Year 14		6 B			2		6 - 3		1							1			
Year 15																			
OTAL ROLL	103	88							103	88			**	**	8	1.8	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.

🔀 Micr	osoft Excel	- 3037J	ul3.csv							
🖲 Eile	: <u>E</u> dit ⊻iev	v <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ools	<u>D</u> ata <u>W</u> indow	Help					
0 🖻		60	🖤 🐰 🖻 🛍	• 🛷 🗠 •	cu + 🍓		1	00% • ?	•	
齿 💼	12 2 6	6		ly with <u>C</u> hanges	End Reviev	loc 🖕				
Arial		• 10 •	BIU		\$%,	+.0 .00 €		• <u>ð</u> • <u>A</u> •		
J.	2 🗸	f _x	1							
	A	B	C	D	E	F	G	Н	I I	J
1 Far	mily nar First	t name St	tudent ID	Gender	Ethnicity	1 Ethnicity 2	Ethnicity 3	Year of schoo	Туре	FTE
2 AH	Hu	M	303700001	M	AFR			5	RE	1
3 BA	ECEs		303700002	F	EUR			8	RE	1
4 BA	Lai	th	303700003	F	EUR			5	RE	1
5 B/	Wi	Gr	303700004	М	EUR			6	RE	1
6 BI	Dy		303700005	M	EUR			8	RE	1
7 B0	WI Fel	qe	303700006	М	EUR			6	RE	1
8 BR	OF Dre	10 A	303700007	М	EUR			4	RE	1
9 BL	RI[Kai	Ba	303700008	F	EUR				RE	1
10 BU	Ka	or	303700009	М	AFR			7	RE	1
11 BU	2 An	elc	303700010		EUR				RE	1
10 01			000700011		Ene					

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 "HCls" and the Vertical group title to be "Class" then the following will be displayed:

Validate data (does NOT create file)	Audit List Printing At the time of Ministry returns all class lists should be printed and signed by the class teacher concerned.
Prepare MOE file	Print Audit List as at Print Audit List as at Print class list - horizontal (HCIs)
Print MOE Returns	C Print class list - vertical (Class) C Print Maori Language Resourcing list C Today
Print MOE Audit List	Print Audit List

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:

Validate data (does NDT create file)	Audit List Printing At the time of Ministry returns all class lists should be printed and signed by the class teacher concerned.	
Prepare MOE file	Print Audit List as at Print Audit List as at Print class list - horizontal (Class)]
Print MOE Returns	C Print class list - vertical (Room) C Print Maori Language Resourcing list C Today	
Print MOE Audit List	Print Audit List	

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.

	Family	Name	Firs	t Names	Att	Status	Gen- der	Date of Birth	MOE Year	Class	Room	FTE	
1	AD		Tav		<u> </u>	Full time	F	29/01/1992	8	Yr8	Rm19	1.0	
2	AV		Ros	Scott	<u> </u>	Full time		21/07/1991		Yi8	Rm17	1.0	
3	вн		Han			Full time		03/05/1991		Yr8	Rm18	1.0	
4	BU		Zoe			Full time		20/04/1992		Yi8	Rm19	10	
5	CA		Sea	an Evars		Full time		02/05/1991		Yr8	Rm17	1.0	
6	CR		Dav			Full time		20/04/1992		Yr8	Rm17	1.0	
7	DO		Rob	m		Full time		19/01/1992		Yr8	Rm17	1.0	
8	ED		Lau			Full time			8	Yr8	Rm17	1.0	
9	EN		San Rich	.ge		Full time	м	17/09/1991	8	Yı8	Rm18	1.0	
10	FIL		Meg	ra		Full time	F	17/07/1991	8	Yı8	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		Yıß	Rm17	1.0	
13	GA		Bob	as		Full time	M	09/08/1991	8	Yı8	Rm19	1.0	
14	HE		Cait			Full time		16/12/1991		Yı8	Rm17	1.0	
15	KA		Gar)		Full time	M	31/10/1991		Yr8	Rm19	1.0	
16	KA		Jord			Full time		29/02/1992		Yr8	Rm17	1.0	
17	KH	DSON	Atai			Full time		22/07/1991		Yr8	Rm18	1.0	
18	LE		Tay			Full time		11/03/1992		Yı8	Rm19	1.0	
19	LO		Beth	2		Full time		06/04/1992		Yr8	Rm17	1.0	
20	MA		Fran	ау		Full time		30/06/1991		Yı8	Rm19	1.0	
21	Mc		Ash	candra 🛛	<u> </u>	Full time		20/10/1991		Y18	Rm18	10	
22	MIL		Cait		<u> </u>	Fulltime		11/03/1992		Yr8	Rm19	1.0	
23 24	NIC PE		Mich Giar	am. Jo	<u> </u>	Full time Full time		04/06/1991		Y18 Y18	Rm18 Rm19	1 <u>0</u> 10	
24 25	PIE		Brei		<u> </u>	Full time		25/07/1991		118 Yr8	Rm19 Rm17	1.0	
20 26	RA		Rich	ies el		Full time			8	118 Yr8	Rm17 Rm19	1.0	
27	SIL		Isaa			Full time		07/11/1991		Y18	Rm18	10	
28	SIL		Tyse		<u> </u>	Full time		07/11/1991		Y18	Rm18	10	
29	so		Jam	Roval	<u> </u>	Full time		07/12/1991		Yr8	Rm17	10	
30	TE		Zak	rgy Troy		Full time		28/09/1991		Yi8	Rm18	10	
31	TR	NT	Zoe			Full time		26/10/1991		Yr8	Rm19	1.0	
32	VIN		Nat.	avera		Full time		21/03/1992		Yr8	Rm18	1.0	
33	WF		San			Full time		08/04/1991		Yr8	Rm18	1.0	

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.

ło.	Family Name	First Names	Att	Type	Gen- der	Date of Birth	MOE Year	Form	TGRP	FTE
					-		_			
		Kate		RE	F	20/11/1990			FROF	1.0
		Simeon		RE	M	20/09/1998			KEMF	1.0
	Bl	Susan		RE	F	10/03/1999				1.0
	Co	Roy Repunga Charles		RE	M	24/01/1987			WICN	1.0
	Go	Thisisatestforsixtychar		RE	F	20/11/1990	10			1.0
		actersaaaaaaaaaaaaaaaa								
		aaaaaaaaaaaaaaaaaaaaaa								
	Gr			RE	F	12/03/2000				1.0
	Gr	Helen		RE	F	13/12/1996	4			1.0
	Gr	Rose		RE	F	02/02/2000	1			1.0
	Jo	Richard		RE	M	11/03/1999				1.0
0	Ka			RE	F	19/11/1990			KALM	1.0
1	Ke	Patricia		RE	F	16/09/2000				1.0
2	Sr	Jane		RE	F	01/03/2000				1.0
3	Thisisastudentwithsixt	James		RE	M	20/11/1990			FROF	1.0
- -	ylettersintheirnamenn	Cambo		1.2		20/11/1000	ľ		1.100	1.0
	nnnnnnnnnnnnnnn									
	try of Education Re All of the stu class list are	those who are present to <i>quired Declaration:</i> dents in the class ar attending school.	e on	the class		-				
	Teacher									

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'.

OpCollege		AUDIT LIST			Omitted Student Types (Form order						
No.	Fam	ily Name	First Names	Att	Туре	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	G		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.

No.	Family Name	Family Name First Names		Maori MOE Language Year Learning Level		Ethnicity 2	Ethnicity 3
			Index				
	Hu	Whaiora Jamie-Lee Danelle	D	14	NZM		
		Yvonne	D	14	NZM		
		Otenhen Kinni De 11	Index	42			
		Stephen Kiingi Ropiha	D	13	NZM		
	Pi Pi	Nancγ Ani Matekitatahi Justin	D D	13	NZM NZM		
evel 4			D s=3 Total nur Maori Language	13 mber of Mar MOE Year		Ethnicity	Ethnicity 3
ev el 4	1(a): 12-30%, Year 13:	Matekitatahi Justin Total number of student	D s=3 Total nur Maori	13 mber of Ma MOE	NZM ori students = 3 Ethnicity	Ethnicity	
evel 4 No.	(a): 12-30%, Year 13: Family Name	Matekitatahi Justin Total number of student First Names Jamie-Lee Catherine	D s=3 Total nur Language Learning Index	13 mber of Ma MOE Year Level	NZM ori students = 3 Ethnicity 1 NZM	Ethnicity	
ev el 4	(a): 12-30%, Year 13: Family Name	Matekitatahi Justin Total number of student First Names	D s=3 Total nur Maori Language Learning Index	13 mber of Ma MOE Year Level	NZM ori students = 3 Ethnicity 1	Ethnicity	

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.



Subject Specifications - List of faults found
MOE code is blank or not a valid code for 12COM in Communications
MOE code is blank or not a valid code for 13COM in Communications
No hours specified for 9INF in Computer Studies
No hours specified for 10INF in Computer Studies
No hours specified for 10DET in Design and Technology
No hours specified for 7PER in Drama
No hours specified for 8PER in Drama
No hours specified for 9ESL in English second language
No hours specified for 10GRA in Graphics/Graphics & Design
No hours specified for 9GRA in Graphics/Graphics & Design
No hours specified for 8HLT in Health Education
No hours specified for 9HLT in Health Education
No hours specified for 10HLT in Health Education
No hours specified for 9INF in Information Technology
No hours specified for 10MAO in Maori (Te Reo Maori F3-5/Te Reo Rangatira F6-7)

Illustration 30 : A list of subject code errors

On clicking the button above, the following screen will be displayed.

ClassRoom Manager / Student	Manager subject spec	ifications			
Subjects offered by your school	Subject details				
by your school	Subject name	Communications		The name by which known in your scho	
Accounting Applied Mathematics	Default Learning Area		•	for each associal	
Art - Painting (Practical Art) F7 Art - Photography (Practical	Default MOE subject		•		
Art (F3-5) Practical Art F6 Aviation Studies	Default MOE Code	COMR School Co	ode COM	Record subject	changes
Biology/Biological Science Business Studies Chemistry	Option classes	Options NZQA standard	ds Hours	Unattached options	Print list
Classical Studies Communications	12COM	Option details			
Computer Studies Design	13COM	Option code	12COM		
Design Design and Technology Drama		Hours as if for full year	150		
Economics English		Mode of instruction	This school	-	Predominant
English second language French		Predominant mode	Face to face teach	ning 🔽	mode has not yet been finalised by
Geography Graphics/Graphics & Design		Learning zone	Year 12	•	the M.O.E.

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.

Subject details		
Subject name	Communications	The name by which the subject is known in your school
Default Learning Area	Language and Languages / Nga Reo 📃 💌	for each associated option
Default MOE subject	Communication Skills	
Default MOE Code	COMM School Code COM	Record subject changes

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.

Subjects offered by your school		Subject details		The name by which the subject is
Accountancy Alternative Mathematics Applied Mathematics	-	Default Learning Area		known in your school for each associated option
art (core) art (Other) art Design		Default MOE Code	School Code	Record subject changes
ut History ut Painting ut Photograpy ut Sculpure iological Technology iology/Biological Science usiness Studies Jatering & Hospitality		Option classes	Options NZQA standards Hours Option details Option code Hours as if for full year	Unattached options Print list
atering & Hospitality hemistry hinese			Mode of instruction Predominant mode	Predominant mode has not ys been finalised b
Classical Studies Clothing and Textiles Computer Studies			Learning zone	the M.O.E.

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 h	nour setting	js	
			2003) requires schools to provide information relating to the number of hours during the year.
Enter here th	e number of ho	urs v	which would be spent in each option if the option was taken for the FULL year.
			lents move through (say) three sets of options per year) then these entries will s scenario for Ministry returns.
Option	Hours		1
10BUS	90	H	Either enter the hours for
10DET	0		each option separately
10ENG	150		
10ESL	90	Ξ	or select options from the
10FRE	90		table, enter the hours below,
10GRA	0		and click 'Set hours'
10HLT	0	-	Hours :
10INF	0		
10INF	90		Set hours
10JPN	90		Set nours
10MA0	0		
10MAT	150		
10MUS	90		
10PED	60		Record changes
10SCI	120		
10SOC	90		

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) via the Software Download page or the MUSAC Software CD, or alternatively it can be downloaded from Microsoft (www.microsoft.com/download).
- 2 A PDF file viewer such as Acrobat PDF Reader will be required, eg. from 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 M 1. Printed the tables 2. Recorded the last five digits of the che and 3. Signed and posted the tables to the M	cksum printed on the bottom right of the tables		
System Admin - Reset Message			

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

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 <u>http://web.minedu.govt.nz/webservices/DEX-DexServiceX509-Prd-01.00.00.wsdl</u>
- Wrapper server address: http://localhost

Once these settings are set up, clicking **Test Connection** can verify whether these settings are working.

-	Help				
www.musac.co.nz					
8					
ğ	2	Settings for MUSAC En	rol		
มัน		Enter or check your school na	me and Enrol password(provided by the Mo	oE's eAdmin Team):	
W.F		School Name and ID	College		
ž		Service Password	F	Reset Password to Default	
			 _		
B			only if required by your technician otherwis	e changes may not be necess	ary to complete the submission
S		Proxy User Name			
Ĕ		Proxy Password			
<u> </u>		Proxy Address			Port
		Enable Keep-Alive	true		S
		MOE Service	http://web.minedu.govt.nz/webservices/	DEX-DexServiceX509-Prd-0	
		Wrapper server address	localhost		
					Test Connection
					nt
				(Save Close
	L				

Figure 308: Settings for MUSAC Enrol details



23.2 Adding a New Student

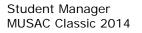
- 1 Enter new student data
- 2 Click Get/Check NSN button
- 3 Wait for processing results from MOE Enrol server
 - Response B = Confirmed NSN.
 - Response F = New NSN. No further action is required for either of these response types. The NSN will automatically fill the National Student Number field.

Essential details	s for Middle Earth School 🔻	Once the family name has been entered,
Family name	TestBOne	other students with the same family name will be listed below.
First names	Fredda	If you wish to duplicate selected details
Preferred name	Fredda	then select a name from the list.
Date of birth	17/04/1997	
Gender	Female	
Ethnicity Help	•	
Status		
Optional deta	ils for 💿 2008 🔵 2009	
Year	Year 8	
Form	•	Please waiting for MOE server to processing request
Tutor	•	Sel
Enrolment number	27196	
National student no.		



v Student		
Basic details	Default data	Default documents
Essential details Family name	for Middle Earth School 🔹 TestBOne	Once the family name has been entered, other students with the same family nam will be listed below.
First names	TestBOne will be listed below. Fredda If you wish to duplicate selecter then select a name from the list	If you wish to duplicate selected details
Preferred name	Fredda	then select a name from the list.
Date of birth	17/04/1997	
Gender	Female	
Ethnicity Help	·	
Status	•	
Optional detai	ls for 💿 2008 🔵 2009	
Year	Year 8	
Form	•	
Tutor	-	Selected sibling :
Enrolment number	27196	
National student no.	0117318462	Select an Unlisted Student
	Get / Check NSN	





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.

🦽 Bad	National Student Number			<u> </u>					-
🛩 🕛	National Student Number								_
	National Student N	umber for selected	d student:						
	NSN (National Student Number)	114024723		First Name	LastName	Year	Form	Tutor	Status
	Hort (Holonal etaderit Hambel)	114024725			TestDOne		i Yr 5	AB1	Full time
A Cha	First Name:	Xiao			TestFOne		2 Yr 2	AB1	Full time
					TestCThree		2 Yr 2	AB3	Full time
	Last Name:	TestAOne		Fredda Joyc			5 Yr 6	AB1	Full time
					Nachor		5 Yr 5	AB2	Full time
	DOB (Date of Birth):	12/12/1999	-		TestEOne		5 Yr 5	AB4	Full time
		1		Margrett Hai			2 Yr 2	AB3	Full time
🛟 Eam	Gender:			-			×	AB2	Full time
Eam								1.0.4	
					-			AB1	Full time
	Enrol URL:	The process encount error code(53):ErrorMe invalid. BirthDate must /StsStudentRecord/Per	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud			AB1 AB4	Full time Full time
View		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
View		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud				
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			
Prec		error code(53):ErrorMe invalid. BirthDate must	ssage: BirthDate be in the past /I	e ' 2010-12-12 ' ErrorMessage: X	of this stud	lent is			

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.

musad

School Name	Start Date	Last Date	NSN	First Name	Last Name	DOB	Gend	URL		-
Wakefield School			0129344177	Margrett	TestCOne	16/04/2002	м			_
ound partially	matched	record list f	rom Enrol:							
ana paraany	materieu									
School Name	Start Date	Last Date	NSN	First Name	Last Name	DOB	Gend		Conf	
Wakefield School			0117224527	Margrett	TestCOne	16/04/2002	F	Enrol URL	False	
							_			
• [Н



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	Gen der	URL	Confid ential
Data from SM:		Date							
Wake field School			0129344177	Margrett	TestCOne	16/04/2002	М		
Discrepancies Data from MOE Enrol:									
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.

•			
All Documents	Student : Kaycee TestEOne	Year: 5 Class: Yr 5 Roc	om : AB4
 Personal details.dmt Errolment details.dmt Personal details Prim.dmt 	Family Name TestEOne First Names Kaycee Preferred Kaycee Other personal details Room Family Teacher	This year Next year 5	Right-click to connect picture
	Address 1 Address 2 Address 3 Address 4 Address 5 Enrol front end by either searching with differ new record: Address 5 Enrol URL: https://web.minedu.govt.nz/leadspace/sia_log Address Info k	Enrol system at all. Please visit ent parameters or by creating a	Gender Male Date of birth 11/06/1998 Age at Jan 1 09.06.21 Age at today 10.05.08 Enrolment 11/008
	Home phone URL: Student's phone Student's email	URL not set Ministry details	Enrolment details
Add Document	Medical Caregiver details Sensitive Financial details IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Options Timetable Fiter <page< td=""> Fiter <page< td=""></page<></page<>	Pastoral

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:

8			
All Documents	Student : Merill TestCTwo	Year:7 Class:Yr7 Roo	m : AB2
	Family Name TestCTwo	This year Next year	Right-click to
	First Names Meril	Year 7	connect picture
	Preferred Merill	Class 2008 Yr 7	
Personal details.dmt	Other personal details	Room 2008 AB2	
Enrolment details.dmt	Family	Teacher / Dean	
	Family details	House	
	Address 1 Address 1 Address 2	Register details	Gender Female
	Address 2 Address 2 Address 2 CITY	Local 323400026	Date of birth 29/11/1995
	Address 4	Type Regular student	Age at Jan 1 12.01.03
	Address 5	Status Full time	Age at today 12.11.21
	Address Info Withheld (MoE Privacy Indicator)	Nat. Student Number	Enrolment 11/006 number
	Mailing details	Get/Check NSN	
	Home phone	https://www.minedu.govt.nz/goto/sms URL: <u>View NSN online</u>	Enrolment details
	Student's phone		
	Student's email	Ministry details	Maori details
	Medical Caregi	ver details Options	Pastoral
Add Document		ial details	
			▶ //
	Add Prev Next Print View	v Alarms Filter < Page 1 / 1 Page	e > Help Close
	Figure 215, Updat	od Porsonal Dotails scroop	

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

Data Coptions	Ext Doo 🖄
Student : {cm.col(3)} {cm.col(1)}	Year : {cm.col(16)} Class : {cm.col(17)} Room : {cm.col(
Family Name First Names	This year Next year Year
Preferred	Icm spec
Family {cm.sm("7")} Family details	Viceanit
Address 1. Address 2	Register details
Address 3 Address 4	Local
Address 5.	Status Age at today (cm.special
Mailing details	Nat.Student Enrolment Enrolment Get/Check NSN
Home phone:	URL: Enrolment details
Student's email	Ministry details Maori details

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

1/1 Data 20ptions	Exit Doc	
Student : {cm.col(3)} {cm.col(1)}	Year : {cm.col(16)} Class :	{cm.col(17)} Room : {cm.col(1{
Family Name First Names First Names Other personal details Family Com.sm(7") Family details	This year Next year Year	
Address 1: Address 2:	Register details	Gender
Address 3 Address 4 Address 5	Local student ID Type Status	Date of birth Age at Jan 1 (cm.special Age at today (cm.special
Address Info Withheld (MoE Privacy Indicator)	Nat. Stüdent	Enrolment
Home phone:		Enrolment details
Student's email	Ministry details	Maori details

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.

National Student Nu								
ISN (National Student Number):	117224527		First Name	Last Name	Year	Form	Tutor	Status
			Alice	TestDOne		Yr 5	AB1	Full time
irst Name:	Margrett Harroet		Chantey	TestFOne		Yr 2	AB1	Full time
			Emory	TestCThree		Yr 2	AB3	Full time
ast Name:	TestCOne		Fredda Joyce	TestBOne		Yr 6	AB1	Full time
			Heloise	Nachor		Yr 5	AB2	Full time
OB (Date of Birth):	16/05/2001	-	Kaycee	TestEOne		Yr 5	AB4	Full time
	1		Margrett Harroet	TestCOne		Yr 2	AB3	Full time
ender:	Male		Merill	TestCTwo		Yr 7	AB2	Full time
			Sheba	TestCFour	6	Yr 6	AB1	Full time
		Get/Check NSN	Xiao	TestAOne	6	Yr 6	AB4	Full time

• Response type F = No further action is required. The NSN will automatically fill the National Student Number field.

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
21/10/2	008 11:00:58 a.m.	MUSAC MUSAC	1	Heloise Nachor	0120668519	0	ОК	E
21/10/2	008 11:01:21 a.m.	MUSAC MUSAC	1	Fredda Joyce	0117318462	0	ОК	В
21/10/2	008 11:01:46 a.m.	MUSAC MUSAC	1	Alice TestDOne	0000000000	0	ОК	D
21/10/2	008 11:18:54 a.m.	MUSAC MUSAC	1	Kaycee TestEOne		0	ОК	E
21/10/2	008 11:19:13 a.m.	MUSAC MUSAC	1	Kaycee TestEOne		0	ОК	E
21/10/2	008 11:29:48 a.m.	MUSAC MUSAC	1	Xiao TestAOne	0114024723	10	Error from external system.	
21/10/2	008 11:30:50 a.m.	MUSAC MUSAC	1	Merill TestCTwo	0114024445	0	ОК	С
21/10/2	008 11:37:30 a.m.	MUSAC MUSAC	1	Margrett Harroet	0117224527	0	ОК	С



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.

NROL / NZQA N	ational Student Number Import	
1	0 Records Available (from NSN import file)	
	4 Records Matched (to Student Manager records) but require checking before update	
2	Records Require Manual Matching (no unique match found between import file and Student Manager)	
68	8 Records Remain (in Student Manager but not found in import file)	
	0 Records have been Automatically Updated	
	1 Records did not Require Updating	
File	Paths	
Stu	dent Manager: D:\Projects\SM\cm.mdb Browse	
10000	D File: D: \Projects\SM\WSID2353.txt	
load Comple	te2 records require manual matching.	Close



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, <u>www.musac.co.nz</u> 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.



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'.

	Backup	5 III Student Manager	SM	10-11-09 15:37
		ClassRoom Manager	СМ	25-08-04 19:56
		V Absences	AB6	31-10-08 12:13
	Restore	Timetable for SM	TTSM	30-01-09 11:50
		Kaff Manager	ST	10-11-09 15:37
	Special Backup	All files	All	15-10-01 14:30
	Special backap			
0	Utilities			
υ				
sa				
2				



Utilities

🚇 Utilities Available drives Search drives Backup icon and title ▼ C: 🗐 e: Student Manager SM 10-11-09 15:41 ClassRoom Manager 25-08-04 19:56 СМ Absences AB6 31-10-08 12:13 Timetable for SM TTSM 30-01-09 11:50 Staff Manager 10-11-09 15:41 ST II Files 15-10-01 14:30 All Add New Remove SM SM • Where in the world is... Checkbox definitions Caption Included files Excluded files sm.mdb,calendar.mdb,cm.mdb,u *.ldb Databases Where in the world... Look for the SM Documents smdocs*.dmt,smdocsb*.dmt,fir sm.exe, sm.mdb Other Documents documents*,dmt/s,documents* Backup log Staff files staff leave documents*.*,staff letters*.* ○ New each time O Continuous Letters media*.* Media Dossiers sm*.dos Delete .dmt, .bkl and .dos before restoring files Data *.dat Single click to open folders in directory lists Create directories as shown in file path E<u>x</u>it

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)

Wh	ere in the world Look for these	
cm.e	exe, cmadmin.exe, cm.mdb	
	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.

Available drives	Search drives
🖃 c: 📃	c:
Path\File	Modified
c:\CM\cm.exe	05/04/04 11:07
c:\vb5\cm\cm.exe	13/11/03 13:07
Illustration 6 : The sea	arch 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.

<mark>7</mark> Class	Room Manager	СМ	2	9-04-118:00
Caption	Included files			Excluded files
Databases	cm.mdb, units.mdb, sta	aff.mdb, cmplan.	mdb, su	
Documents	*.dmt, *.bkl,documents	*.*/s		
Dossiers	cm*.dos			
Graphs	*.gph			
Layouts	*.I??			*.log, *.ldb
Data	*.dat, acc*.txt			
Images	*.bmp, *.jpg, media*.jp	og, media*.bmp	, media ^v	

Illustration 7 : ClassRoom Manager file specifications

Student	Manager SM 2	9-04- 18:05
Caption	Included files	Excluded files
Databases	sm.mdb,calendar.mdb,absences????.mdb,cm	n ×.ldb
SM Documents	smdocs*.dmt,smdocsb*.dmt,financial docum	1
Other Documents	documents*.dmt/s,documents*.lyt/s,docum	ε
Staff files	staff leave documents*.*,staff relief files*.*,s	t
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.

	- T	Direct Filename	Date Time	Size		- Selected Files
9 c: 	un un un un de la	cm.mdb	29/04/2004 17:54	21,590,016	8	🔽 Databases
∎C:\	<u>^</u>	units.mdb	28/04/2004 20:18	737,280		Documents
CM		staff.mdb	27/04/2004 12:02	1,294,336		Dossiers
📄 backup		cmplan.mdb	30/01/2004 11:00	974,848		Graphs
		subjects.mdb	06/01/2004 12:03	133,120		Layouts
	24	cmlv2000.mdb	31/07/2003 14:04	1.773.568		🔽 Data
config	<	cmlv2001.mdb	31/07/2003 14:09	643.072	1 2	Images
documents emails	4	cmlv2002.mdb	01/04/2003 15:02	3.055.616		
oRoturns		cmly2003 mdb	27/01/2004 08:42	2,902,016		
ackup Drive	Fre	e Space: 31379 MB	Backup Date: No exist	ing Backup		Colooted Files
ackup Drive				<u></u>		- Selected Files-
ackup Drive		e Space: 31379 MB Direct Filename	Backup Date: No exist Date Time	ing Backup Size ZipSi	ze	Selected Files
<u>11213222111111111111111111111111111111</u>				<u></u>	ze	
© c: ₩C:\ ▼CM				<u></u>	ze	🔽 Databases
				<u></u>	ze	 ✓ Databases ✓ Documents
C: C:\ CM backup cmbmps				<u></u>	ze	 ✓ Databases ✓ Documents ✓ Dossiers
C:\ C:\ CM backup cmbmps CMRemote				<u></u>	ze	 Databases Documents Dossiers Graphs
C:\ CM backup cmbmps CMRemote CMRemote config				<u></u>	ze	 Databases Documents Dossiers Graphs Layouts
C: CM Dackup cmbmps CMRemote config documents				<u></u>	ze	Databases Documents Dossiers Graphs Layouts Data
C: C: C: Dackup combrps CMRemote config documents emails				<u></u>	ze	Databases Documents Dossiers Graphs Layouts Data
C: C: C:A Deckup cmbmps C:MRemote config documents				<u></u>	ze	Databases Documents Dossiers Graphs Layouts Data

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

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.

Dc:	TD	virect Filename	Date Time	Size 🔺	Selected Files
- 0. 1944 - 1944 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947 - 1947		cm.mdb	29/04/2004 17:54	21,590,016	🔽 🔽 Databases
3 C:\	<u>^</u>	units.mdb	28/04/2004 20:18	737.280	💈 🔽 Documents
CM CM		staff.mdb	27/04/2004 12:02	1.294.336	🖉 🔽 Dossiers
📄 backup	<u> </u>	cmplan.mdb	30/01/2004 11:00	974.848	🖇 🔽 Graphs
	<	subjects.mdb	06/01/2004 12:03	133,120	🖇 🥅 Layouts
CMRemote	<	cmlv2000.mdb	31/07/2003 14:04	1,773,568	🔽 Data
documents	<	cmlv2001.mdb	31/07/2003 14:09	643,072	🖡 🗖 Images
	<	cmlv2002.mdb	01/04/2003 15:02	3,055,616	and a second second second
eReturns	🗸 🖉 <	cmlv2003.mdb	27/01/2004 08:42	2,902,016 🗸	
o backup			kup: (40.573,566-bytes four of 5	April 2014 and a	<u>B</u> ackup
et this restore directory as the backup c: C: CM backup cmbmps					
o backup c: C:\ CM backup					

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.

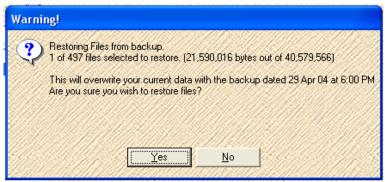


Illustration 14 : Ready to begin the restoration process

If you proceed then the first file will be extracted s shown below.



rom backup	Free Sp	pace: 31369 MB	Backup Date: 29 A	vpr U4 at 6:Ul	JPM		Coloria d Eller
D c:	 T Direct 	Filename	Date Time	Size	ZipSize		Selected Files
ひょうりょう ひとうちょう しょう ちんかいけんせいひょう	<u> </u>	cm.mdb	29/04/2004 17:54	21,590,016	375,597		🔽 Databases
		units.mdb	28/04/2004 20:18	737,280	114,709	2	Documents
CM		staff.mdb	27/04/2004 12:02	1,294,336	81,268	1	Dossiers
🔁 backup		cmplan.mdb	30/01/2004 11:00	974,848	8 107,412		🔲 Graphs
	2	subjects.mdb	06/01/2004 12:03	133,120	20,183		🗌 Layouts
		cmlv2000.mdb	31/07/2003 14:04	1,773,568	349,959	2	🗖 Data
	8	cmlv2001.mdb	31/07/2003 14:09	643,072	65,051		🔲 Images
		cmlv2002.mdb	01/04/2003 15:02	3,055,616	337,419	V	1
	2				>		3. A.M. A.S.
いわ じ ち ち ち ち ち ち ち ち ち ち ち ち ち ち ち ち ち ち	and law of the	source and the second	0000-00-0000000000000000000000000000000		SUCCESSE	ser h	
o	lt 1 of 497	files selected to restore.	(21,590,016 bytes out of 40	(579,566)			<u>R</u> estore
et this backup directory as the defar	1 of 497	files selected to restore.	(21,590,016 bytes out of 40	.579.566)			<u>R</u> estore

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.

Overwrite	e files?					
	831.ZA	lb already exists ir o replace it with th	n the target direct nis file?	огу		
	Yes	Yes to <u>a</u> ll	<u>N</u> o	Notoa <u>l</u> l	<u>C</u> ancel	

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



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

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.

Username:	
Password:	
Exit	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.

	Enter the configura password	ition access
	Cancel	Proceed
Illustrati	on 2 : The reques	st for the special password

Enter the special password and a further small button will appear, as shown below.

Enter the configuration access password					

Cancel	Proceed				

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.



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: 📘 💌 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:	
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.



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	deòiìé	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 of she can enter their new password.

New Password:	*****
Verify Password:	*****
Cancel	Proceed

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
	Gender, Place & Ethnicity	Columns	Type	
Years Select Year 10 104K Year 10 10ED Year 11 10ED Year 12 10F0 Year 13 10MK 11DN 11DV 11DN 11DV 11DN 11DV 11PA 11PK	11PT 9KA 11RA 9ML 12CJ 9NU 12MA 9PE 12MC 9ST 12DA 12TH 12WS 13AD 13SK 9HG 9HU 9HU	Selected Group VF1 VF2 VF3 VF4	ps Status Full time Part time Leaver Pre-enrolment Delete Reset the filter to j 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 fulland 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.

Options	NZQA Standards	Schools	Activities	
Years Forms Groups	Gender, Place & Ethnicity	Columns	Туре	Mark Books
Gender	MOE Five	MOE Ethnicities		
🔽 Male	European Maori Polynesian	Australian	Indian Italian	
Female Place in family	Asian Other	Chinese	Japanese Khymer/Kampuchean/Camb Korean	
r lace in lainny		Dutch	Latin American/Hispanic Middle Eastern	
 Eldests 		German	New Zealand Maori Niue	
O Non-eldests		Greek	None	
	Test ALL four ethnicity	columns (if not then only the	FIRST column will be tested)	

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.

Place in family
C Youngests
C Eldests
O Non-youngests
O Non-eldests

Illustration 3: Student Manager 'Place in family' options

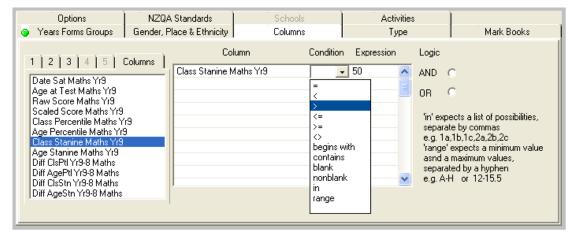
Student Manager offers a wider range of possibilities than ClassRoom Manager.

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.





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.



Options	NZQA Standards	Schools	Activities	
🧿 Years Forms Groups	Gender, Place & Ethnicity	Columns	Туре	Mark Books
Regular student Foreign fee paying student Exchange student Regular Adult student Not attending Returning Adult student Student in Alternative Edu Student in Alternative Edu NZAID (MFAT) scholarship Satellite class student Student in separately fund Teen Parent regular 5 max	cation Developing Kura) cation o student ed unit			

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.

		nicity	Columns		Туре			Mark Books		
	Options	N.	ZQA Standards		Schools			Activities	۲	Years Forms Groups
							•			
'ear A		В	С	D	E	F	~	Search in :		
9 9T	DTM	9TYPS	9TEST					Year: 2003	-	
90	VWPA	9TYWS								
9T	YPS	9FRGI						Set No.: Set 1	•	
90	LMC	9CLSP								
9M	1WDV	9wwPa								
9M	1U0A	9HOJS								
9T	YSP	9MSMA								
		9TDDV								
10 10	ГРНР	10CPHP		10TDTM		10.0	, ~ _			
: [1111					>				

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).

Gender, Place & Ethnic	ty Columns	Туре	Mark Books			
Options	Options NZQA Standards		Activities	0	Years Forms G	roups
required 9014201E F standards 9014301E E from the 9014401E C 9014401E C 9014601E C 9014701E L 9014701E L 9014801E S 9015001E L 9015101E S	Ian and prepare food to meet Ian and prepare food to meet xplore cultural influences on fi- malyse nutritional information a escribe the impact of societal se straightforward algebraic n ketch and interpret linear or q olve problems involving meas se geometric techniques to pi olve straightforward number p olve right-angled triangle prob ♥	Achieved Merit Excellence OR Just filter those v (ignore all other	X - removed Failed to sit No restriction vho have standards attached. restrictions relating to units) save blank for no restriction)		Hooked statu Hooked on Tagged Neither NSI Known Not known	

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.

Gender, Place & Ethnicity	Columns	Туре	Mark Books	
Options NZG	QA Standards	Schools	Activities	🧿 Years Forms Groups
,				

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.

Options NZQA Standards Activities Years Forms Groups Gender, Place & Ethnicity Columns Mark Books Туре 13PX 2004 13TE 2004 ^ 9AT 2004 9CL 2004 9EG 2004 9ES 2004 9FR 2004 9HO 2004 9MA 2004 9MS 2004 9MU 2004 9MW 2004 9PE 2004 9SC 2004

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.

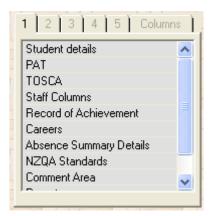


Illustration 1 : Selection of the first category – Student details

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.

1 2 3 4 5 Columns
Personal 🔨
Caregivers
Ministry
Medical
Rename1
Rename2
User
History1
Other
Attendance
Sensitive
Photographs
Notes
Financial 🤜

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.

1 2 3 4 5 Columns Family Names Frist Names Preferred Mail to whom Invoices Reports Address 1 Address 2 Address 3 Address 4 Ward Nationality Language Origin school Changes of school This Year Form Form(Next year) Group(Next year) Group(Next year) Gender	1 2 3 4 5 Columns D0B Image: Columns Image: Columns Image: Columns Image: Columns Date first started First started here First started here Image: Columns Image: Columns Special Education Status Image: Columns Image: Columns Image: Columns Image: Columns Iwi Iwi Iwi Image: Columns Image: C	1 2 3 4 5 Columns Iwi Hapu Waka Maunga Awa School history House Teacher/Dean Student email Buddy/Mentor Teacher/Dean Student email Buddy/Mentor Teacher/Dean Student email Buddy/Mentor Teacher/Dean (Next year) Visa expiry date Buddy/Mentor (Next year) Visa expiry date Buddy/Mentor (Next year) Bith Cert. sighted Card received Card requested Card received Date enrolled Enrolment details National Student Index A,K,A. Photograph 2 Photograph 3 V	1 2 3 4 5 Columns Passport number Address 5 Postal address 5 Page 1 photo Mail to which Post code Post code Post code Post code (Post) Pay by autopayment Report name Report name Report full name Bursary Bursary Total Image: Column Part Part Part Part Part Part Part Part
--	---	--	--

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....

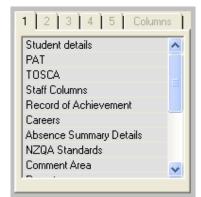


Illustration 4 : Selection of the first category

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.

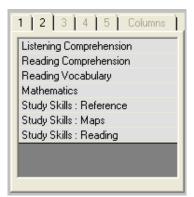


Illustration 5 : Selection of the second category

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.

1 2 3 4 5 Columns
Year 8
Year 9 Year 10

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.

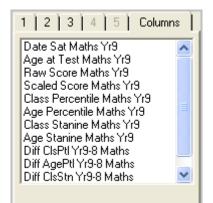


Illustration 7 : Selection of column(s)

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.

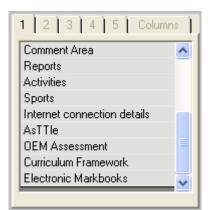


Illustration 8 : Selection of Electronic Markbooks

Click on 'Electronic Markbooks' and the list of available markbooks will be displayed, as shown below.

1 2 3 4 5 Columns
Display ALL markbooks 🛛 🔥
10AT 2004 🤍
10CL 2004
10CP 2004
10CR 2004
10DM 2004
10EG 2004
10ES 2004
10FR 2004 🔍
Leour coole

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).

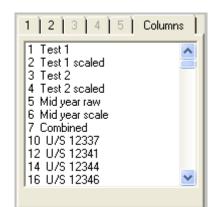


Illustration 10 : Selection of markbook column(s)

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.

1 2 3 4 5 Columns
9TE 2004 🔨
9TY 2004
9wW 2004
Generic Markbook
Markbook Option A
Markbook Option B
Markbook Option C
Markbook Option D 📃
Markbook Option E 🤍 🤜

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.

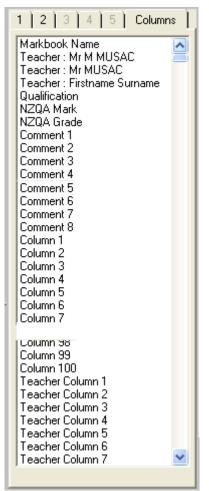


Illustration 12 : Selection of generic or option related markbook column(s)

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}

28.1 Using the {a} tool in the word processor

One of the buttons at the top of the word processor is titled $\{a\}$.

Source Processor		×
OK Cancel Arial	✓ 10 ✓ F B / U (a) D T E = = Sp	Zm
{cm.spe		

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.



8	RTF code selection						
	Columns Caregivers CF Specials	Specials Financials Count	Genders Activities Grade specials	· · · · · · · · · · · · · · · · · · ·	Attendance	Standards	
	Absence dates Term Week 1 Date e.g. 05 / Open days e.g. Xxx Both e.g. 05 / 11 Xx: Student's data e.g. X Proceed	x	year	Medical details Poctor name Poctor - contact details Poctor - notes Pental name Pental - details Pental - notes Has medical data	Family details Family title Family salutatio Timetable detai Timetable year Timetable option Timetable option Timetable numbe	is set name set number	
-						Close]

Illustration 2 : Student Manager 'Specials'

There are only a few specials. These are displayed above.

	Count			Column titles SM Specials
Columns	Specials		Names	Standards
Caregivers	Financials A	ctivities Pastora	al specials Attend	Jance
ep 1 Select caregiver	Postal zip code	Logon	Emergency contact	Caregiver User field 1
aregiver 1 🗸 🗸 🗸	Physical address 1	Password	Living with	Caregiver User field 2
ep 2 Select field	Physical address 2	Occupation	Legal guardian	Caregiver User field 3
mily name	Physical address 3	Workplace	Access rights	Caregiver User field 4
st names	Physical address 4	School assistance 1	User flag 1	Caregiver User field 5
le	Physical address 5	School assistance 2	User flag 2	Caregiver User field 6
lationship	Home phone	School assistance 3	User flag 3	Caregiver User field 7
stal address 1	Work phone	School assistance 4	User flag 4	Caregiver User field 8
stal address 2	Fax number	Notes	User flag 5	Caregiver User field 9
stal address 3	Cell phone	Invoices	User flag 6	Caregiver User field 10
stal address 4	Other phone	Reports	User flag 7	Title initial family name
stal address 5	Email address	Voting rights		First names Family

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.

RTF code selection			
 RTF code selection CF Specials Columns Specials Caregivers Financials Student's financial details Total current debt Current month's debt Outstanding one month debt Outstanding three months debt Outstanding four months debt Outstanding four months debt Outstanding more than one month Outstanding more than two months 	Genders	Linked comments Column titles Names Pastoral specials Pastoral specials Attendance Financial document components Page count Invoice number Statement number Receipt number Credit note number Addressing financial documents Financial documents should be addressed using the 'caregivers' tab above and by then selecting 'first financial = Yes' as the required caregiver. Note that address	SM Specials Standards
Outstanding more than three months Outstanding more than four months		component selections will be over-ridden during printing by the 'postal' or 'physical' selection on each student's 'mailing details' screen.	
			Close

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.

RTF code selection	
CF Specials Coun Columns Specials Caregivers Financials Amalgamated details	Grade specials Linked comments Column titles SM Specials Genders Names Standards Activities Pastoral specials Attendance
These apply to all of a student's transac	tions in the selected year
Report by Select either : Either calendar Total pastoral r 2008 Total offence p Or academic year Number of offer Year 8 Number of sup	1. Select type noints Offences its Merits inces Supports
	Proceed

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

RTF code selection				
Caregivers Financi CF Specials Count	als Activities Grade specials	Pastoral specials Linked comments	Attendance Column titles SM Spe	cials
Columns Specials	Genders Genders Display column contents Display column title (excluding markbook name) Display column title (including markbook name) Display column Long title N.B. You may quickly add the s preferred name by typing Ctrl- in the word processor.	Names	s from markbook : round to t whole number?	
			Add Columns	Close

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.

1 2 3 4 5 Columns	1 2 3 4 5 Columns	1 2 3 4 5 Columns
Comment Area Reports Activities Sports Internet connection details AsTTIE OEM Assessment Curriculum Framework Electronic Markbooks	Display ALL markbooks 10AT 2004 10CL 2004 10CP 2004 10CR 2004 10CR 2004 10DM 2004 10EG 2004 10EG 2004 10FR 2004 10FR 2004	1 Test 1 2 Test 1 scaled 3 Test 2 4 Test 2 scaled 5 Mid year raw 6 Mid year scale 7 Combined 10 U/S 12337 12 U/S 12341 14 U/S 12344 16 U/S 12346

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.

1 2 3 4 5 Columns	1 2 3 4 5 Columns
9TE 2004 Image: Constraint of the second s	Markbook Name Teacher : Mr M MUSAC Teacher : Mr MUSAC Teacher : Firstname Surname Qualification NZQA Mark NZQA Grade Comment 1 Comment 2 Comment 3 Comment 4

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

RTF code selection	
Caregivers Financials Activities Pastoral specials Attendance CF Specials Count Grade specials Linked comments Column titles SM Specials Columns Specials Genders Names Standards	s
School Middle Earth School Current age Time since started schooling (yy.mm) Date 1 Date 3 Current age (yy.mm) Time since enrolled here (yy.mm) Date 2 Date 4 Jan 1st age Time since leaving school (yy.mm) User name 1 MUSAC MUSAC Jan 1st age (yy.mm) Time since leaving school (yy.mm)	
Form teacher Mr F Teacher Time at this school (yy years mm months) Tutor teacher Mr F Teacher Time in NZ (yy years mm months) Current date dd Month Year Current year Horizontal title	
Current date dd / mm / yyyy Next year Vertical title Tutor Page number Page number	
Clo	se

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 genderspecific 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'.

Caregive	ers	Financials	Activities	Pastoral specials	Attendance		
CF Specials	: <u>]</u>	Count	Grade specials	Linked comments	Column titles	SM Spec	ials
Columns		Specials	Genders	Names		Standards	
he	She						
he	She						
His	her						
His	her (use	his)					
Him	her (use	him)					
Воу	Girl						
Son	Daughte	er					
Son's	Daughte	er's					
Himself	Herself						
,	,						
						_	lose

Illustration 10 : Gender insertions

Names

This allows you to insert one of the four possibilities shown below.

В,	RTF code selecti	on					
	Caregivers CF Specials Columns	Financials Count Specials	Activities Grade specials Genders	Pastoral specials Linked comments Names	Attendance Column titles) SM Specials Standards	
a t c	The following codes all alternate between the and the relevant prono han one of these code combined comment.	e student's name oun where more les occurs within a					
	Preferred name - Preferred name - Preferred name's -						
	Preferred name's -						
						Close	

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.

Columns Specials Genders Names '	Standards
Standard and credit counts Grade counts Specific standard details Literacy and Numeracy	
Select the standard's information which you wish to report.	
Year attached 2008 🗸 Option line All lines 🗸 (Not available if 'all years' selected)	
Level Lev 1 Lev 2 Lev 3 Lev 4 Lev 5 Total	
Incomplete units L1 inc. L2 inc. L3 inc. L4 inc. L5 inc. Total inc.	
Complete units L1 cmp L2 cmp. L3 cmp. L4 cmp. L5 cmp. Total cmp.	
Credits gained L1 crd. L2 crd. L3 crd. L4 crd. L5 crd. Total crd.	
Warning : the calculation of these items can be time consuming and can slow down the viewing / printing of your document.	

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.

Columns Specials	;	Genders		Names	м	arkbooks	Standards	s
Standard and credit counts	Spe	ecific standard details						
Select standard		Select element (if requi	red)		Standard	detail		
90501 1 E	^				Code	Short title	Long title	
90502 1 E	_				Complet	ion Cu	bmission	
90503 1 E					j complet	ion j su	DITISSION	
90504 1 E					No.	of elements pa	assed	
90505 1 E					FI			
90506 1 E		Select performance cri	teria fi	f required)	Element	detail		
90507 1 E					Title	Passed or	r not	
90508 1 E					No. of per	formance crite	ria passed	
90509 1 E	~				Jito, or por	ronnariee ente	na passea	
< · · · >					Performa	nce criteria	detail	
Display code 💿 Short 🔿 Long	С				Title	Passed or	r not	

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.

CF Specials) Cou	unt	Grade specials	Linked comments	Column titles	SM Specials
Select a Curricul	Im Framework o	- <u> </u>	ollowed by one of the rig	ht-hand-side		
NZQA Standar	s		Begun cou	int		
Numeracy					_	
AsTTle			Achieved	count		
STAR			Mastered	count	-	
Essential Skills	Assessments		Mastereu	count		
Internet Conne	tion details					
Activities						
ESOL						
Fees Paid		~				
Report Commer	ito					

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.



CF Specials Count	Grade specials Linked comments Column titles SM Specials
CF Specials Count Select column 1 2 3 4 5 Columns 1 2 3 4 5 Columns Age at Test Maths2-2 Yr9 Image: Scale Score Maths2-2 Yr9 Image: Scale Score Maths2-2 Yr9 Scale Score Maths2-2 Yr9	Count students whose entry in this column is : The same as the current student Equal to
Error Maths2-2 Yr9 Stanine Maths2-2 Yr9 Number Knowledge Mths2-2 Yr? Number Strategies Mths2-2 Yr9 Algebra Mths2-2 Yr9 Geometry & Measurement Mths: Statistics Mths2-2 Yr9	Greater than (or after) Less than (or before) 20 Not equal to Between

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.

CF Specials Count	Grade specials	Linked comments	Column titles) SN	4 Specials
1. Select the required column 1 2 3 4 5 Columns	2. Specify the entry to be counted	3. Select the you wish to pe	calculation which erform		
Date Sat Maths2 Yr9 Age at Test Maths2 Yr9 Test sat Maths2 Yr9 Raw Score Maths2 Yr9 Scale Score Maths2 Yr9 Error Maths2 Yr9	10-20 Including a hyphen (e.c 14-21) indicates that you wish to test for a). Calculate t	number of students ne specified entry the percentage of vith the specified ent		
Error Maths2 Yr9 Stanine Maths2 Yr9 Number Knowledge Mths2 Yr9 Number Strategies Mths2 Yr9 Algebra Mths2 Yr9 Geometry & Measurement Mths:	N.B. This procress can to columns of type Nun text. and Curriculum F	ber, Text, Short			
			1	Proceed	

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.



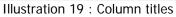
CF Specials	Count	Grade specials	Linked comments	Column titles	SM Specials
If column	5 Columns	contains	then display		^
Record of Achieve School Reporting Careers Absence Summary NZQA Standards Numeracy AsTTIe STAR Essential Skills As Interpret Connection) Details				
			Enter comments direction O Another column's sho entry in the left hand column a t will be displayed for any resu	ort O Another c	olumn's data 🔿 olumn's long title 🔿 Proceed

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.

CF Specials Count	Grade specials	Linked comments	Column titles	SM Specials
1 2 3 4 5 Columns Student Manager PAT PAT PAT PAT TOSCA Curriculum Framework Staff Columns PAT OEM Assessment Record of Achievement School Reporting Careers Absence Summary Details Patients	the column title is Subj	ject To Change. In othe , then the display will be	lay a column title in an Rtf b er words, if you subsequentl e updated dynamically to the	y change



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 ye 2008	Include awards information Include tagged columns	د ا	Counting activities ust select the year and the category(s) then click the message below Just count the number of activities in which the student is involved
or academic ye Year 8 Use These Acti	Printing format : No line feeds - all in one line Each activity in one line All separate lines		,

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 Past	oral specials A	ttendance				
Amalgamated	Amalgamated details							
These apply to all of a student's transactions in the selected year								
Report by	Select either :	Or the total number of	2. Select one or mor	e details or actions				
Either calendar 2008 Or academic year Image: Second secon	Total pastoral points Total offence points Total merit points Number of offences Number of merits Number of supports	1. Select type Offences Merits Supports						
				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.

Caregivers	Financials	Activities Pas	toral specials A	ttendance				
Amalgamated details								
	These apply to all of a student's transactions in the selected year							
Report by	Select either : Total pastoral points	Or the total number of	2. Select one or more Default offence	Default offence action				
Either calendar	Total offence points	1. Select type	Alcohol abuse Assault on student Assault on teacher	3 day suspension Apology to teacher/st				
Or academic year	Total merit points	O Merits	Bullying Classroom Misbehaviou Danger/Behvr/seriou	Guidance Counsellor Home smoking imposin Home Visit				
💿 Year 8 💌	Number of merits	0.1111	Drug use Graffitti Language in class	Letter home Letter requesting meet Mediation				
	Number of supports		Vandalism	Positive points report				
				Proceed				

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.

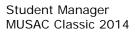
Secondly, you can either select one of the 'Total calculations' from the left hand side of the screen, or you can choose offences, merits or supports in the middle of the screen, followed by one or more from either the associated details list or actions list.

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.





CF Specials	Count		·····, (Column titles SM Specials
Columns	Specials		Names	Standards
Caregivers	Financials A	ctivities Pastora	I specials Attend	Jance
Step 1 Select caregiver	Postal zip code	Logon	Emergency contact	Caregiver User field 1
Caregiver 1	Physical address 1	Password	Living with	Caregiver User field 2
Step 2 Select field	Physical address 2	Occupation	Legal guardian	Caregiver User field 3
Family name	Physical address 3	Workplace	Access rights	Caregiver User field 4
First names	Physical address 4	School assistance 1	User flag 1	Caregiver User field 5
Title	Physical address 5	School assistance 2	User flag 2	Caregiver User field 6
Relationship	Home phone	School assistance 3	User flag 3	Caregiver User field 7
Postal address 1	Work phone	School assistance 4	User flag 4	Caregiver User field 8
Postal address 2	Fax number	Notes	User flag 5	Caregiver User field 9
Postal address 3	Cell phone	Invoices	User flag 6	Caregiver User field 10
Postal address 4	Other phone	Reports	User flag 7	Title initial family name
Postal address 5	Email address	Voting rights		First names Family

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.

RTF code selection					
CF Specials Count Columns Specials Caregivers Financials	Grade specials Linked comments Column titles SM Specials Genders Names Standards Standards Activities Pastoral specials Attendance Standards				
Attendance details N.B. These code inserts will only generate information if the attendance columns for the relevant year have been filled with attendance information for that year using the importation routine in					
Enter the number of half-days for each term in the required year(s) before selecting a Year Term 1 Term 2 Term 3 Term 4	Then select according to Finally select the required insert • Report on half-days Either calendar year Either calendar year				
2000 2001 2002 2003	O 2008 ▼ Explained Explained truancy Guidance Music				
2004 2005 2006 2007	Year 8 Query School activity Sick Bay Wagging Attendance				
Save Changes * = columns found	Cancel Proceed				
	Close				

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 CMAdministrator 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 waggedhalf 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.

MUS	SAC				Nationwide
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	Postal: MUSAC PN912, Private Bag 11 222, Manawatu Mail Centre, Palmerston North 4442				ntre,
	Delivery:	Room T1:21, Te Ara Buildin	g, Centennial	Drive, Palmer	rston North 4410
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	Fax:	(03) 331 6217	Web:		dservices.co.nz
	T UX.		WCD.	Solutionsan	
	Financial and A	Asset Manager Support			Nationwide
	accountshelpdes	k@solutionsandservices.co.n	<u>Z</u>		
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