Classic - Document Design

ClassRoom and Student Manager

2012.4.1

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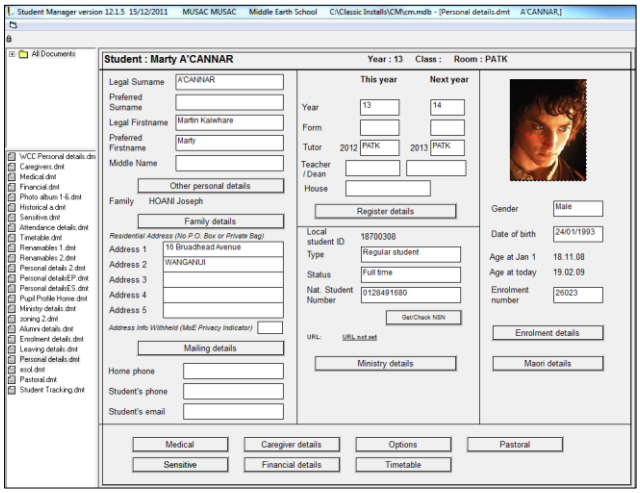
Introduction

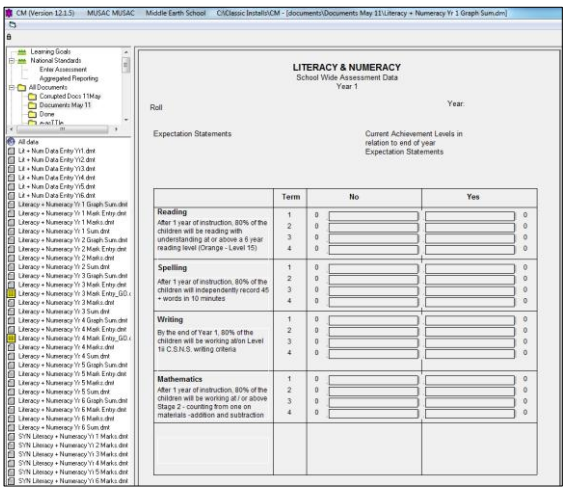
Both ClassRoom Manager and Student Manager have a very similar 'Document Page' that can be used to both enter data and print it out. This allows an extremely high degree of flexibility. You are not restricted to data entries and reports which have been pre-designed in the package. You may design your own documents and your own database.

Perhaps the most powerful feature of ClassRoom Manager and Student Manager is their reporting capacity and use of documents.

Each document doubles as a data-entry screen and data entered on one document is stored in the database, automatically appearing on related documents.

This seminar covers the basics of document design, illustrating along the way some of the features and facilities that have been built into the package to facilitate the design process.





Documents

There are several options that can be taken when designing a document:

1. Modify an existing document.
2. Create a new document.

New documents can be created in one of several ways:

Modifying an Existing Document

We can modify an existing document in two ways:

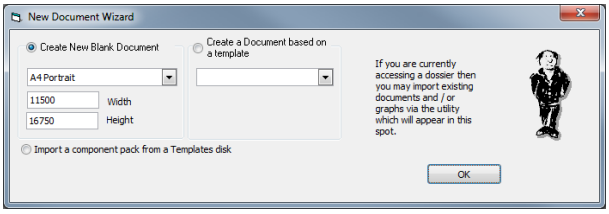
1. If a document is already open simply right click in a blank place on the document and choose 'Edit Document' from the resulting menu (if you have the rights).

2. If you have no documents open right click on a document's name on the left hand side of the screen.

Creating a New Document

The first step in creating a new document is to click on the 'Add Document' button (lower left of the screen).

The New Document Wizard screen will then appear.



Options for creating documents:

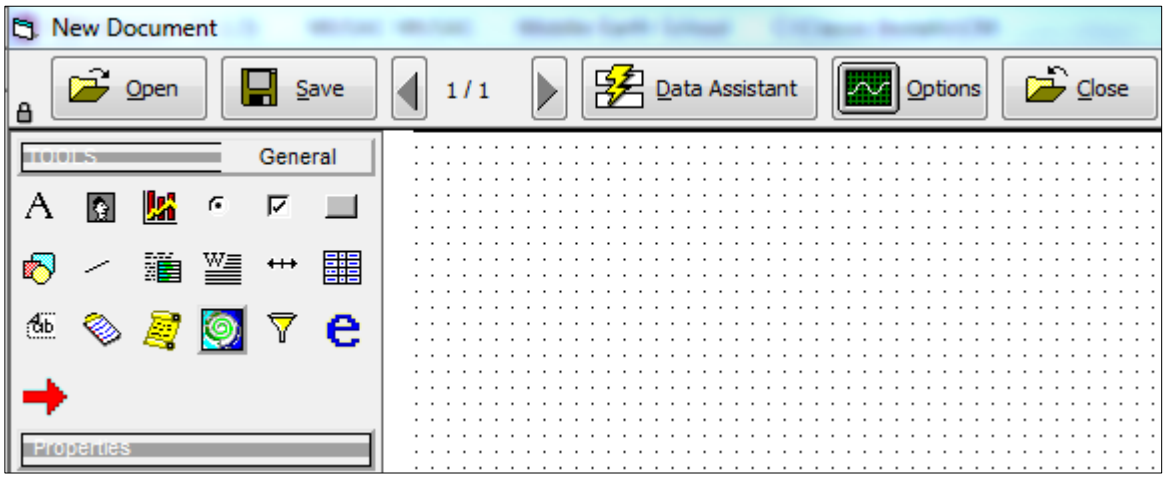
1 *Create a New Blank Document.*
Select the document size you require or create a custom size, (eg. A3 = 16840 x 23814) then click enter.

2 *Create a document based on a template*.
If there are any templates (files with extension .tpl) within the Templates folder of ClassRoom Manager, they will appear in the dropdown menu.

3 *Import a component pack from a Templates disk*.
MUSAC or their agents can create a templates that can be accessed using this method if you have commissioned some documents design.

Designing a Document

Once you've gone through the New Document Wizard you'll be presented with the Document Design window (below).



Elements of the Document Design Window

Open – Open an existing Document

Save – Save the document you are working on. Once clicked you have the choice of using the existing name or entering a new one.

Left/Right arrows – Add a new page to your document or move between existing ones.

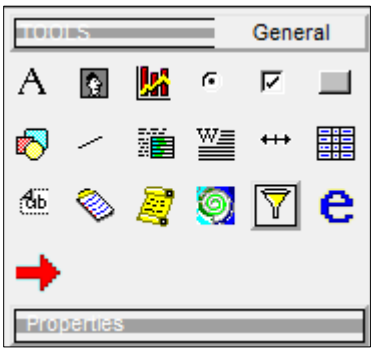
Data Assistant – A two-step wizard for adding fields to your document. (details below)

Options – Allows you to change the Grid, zoom, undo, etc.

Close – Close your document. You will be prompted to Save the document if you haven't already.

Design Tools

A document is basically a collage of elements and the process of creating a document is similar to that used in Desktop Publishing.



The design tools used to create the various document elements can be found on the left-hand side of the screen. They are on a slide that can be locked in position by clicking on the padlock icon next to the **Design Tools** button (upper left of screen).

If an object is selected or highlighted on the document its properties will be shown below the design tools.

However, this area will remain blank if no object is selected.

The Student Manager tool box is very similar. It has the extra tools available for Lists, Financial and a 'Light up' button to show if a field has data in it e.g. Sensitive information.



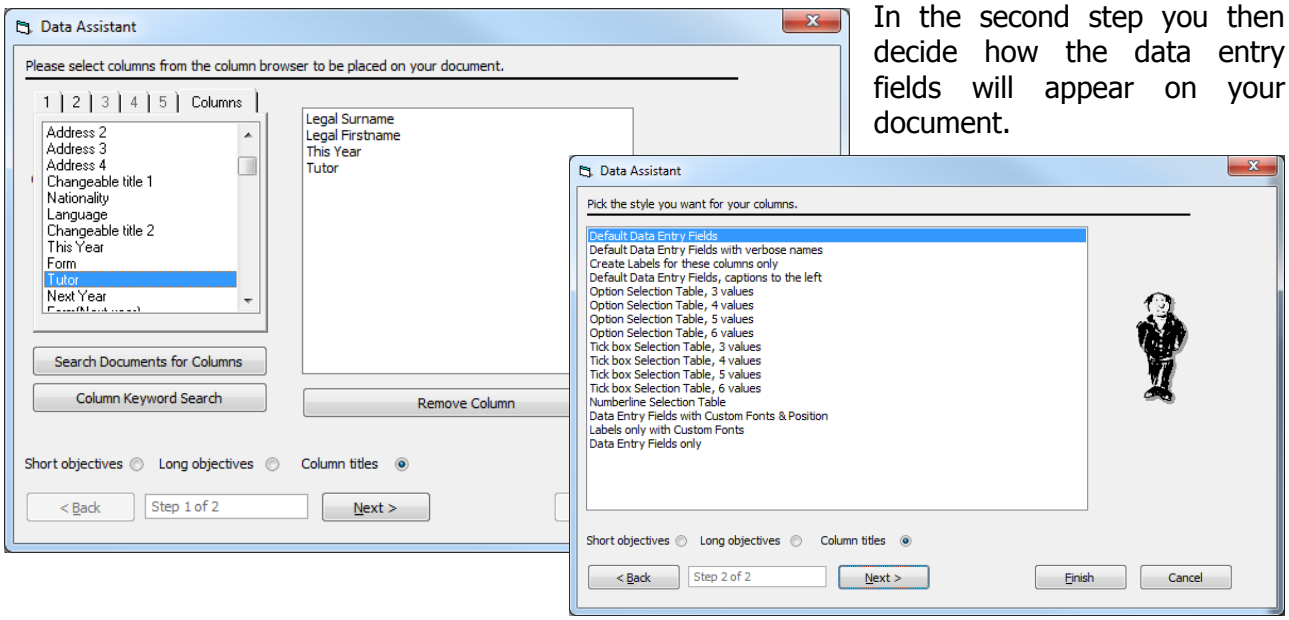
Data Fields



Data entry fields are used in documents to input information into the database and can be added to documents in two ways:

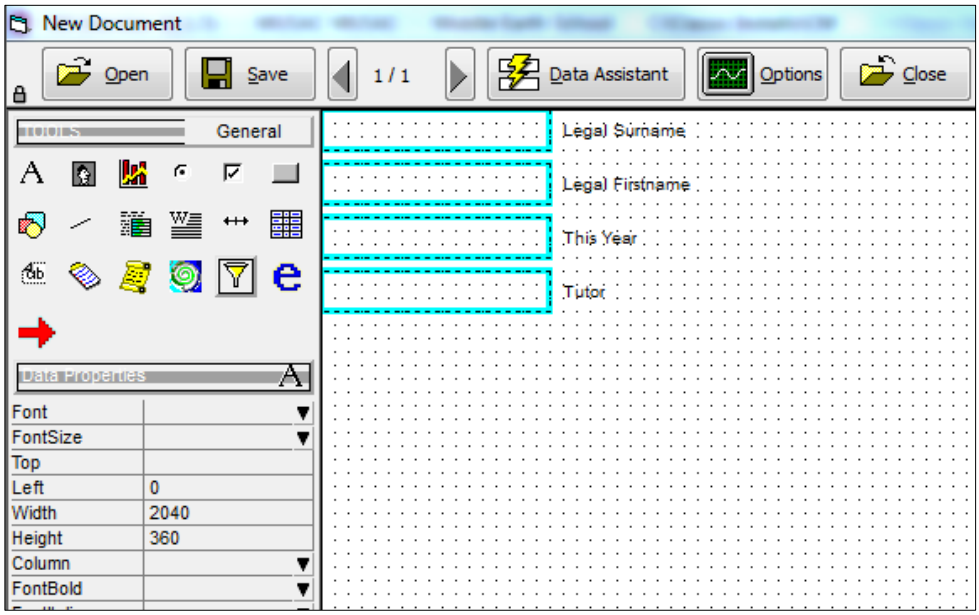
The Data Assistant

The easiest way of adding data entry fields to a document is by using the Data Assistant (mentioned earlier). It is a two-step process. In the first step you select the columns the data will be entered into.



In the second step you then decide how the data entry fields will appear on your document.

Clicking Finish completes the wizard process. The data entry fields then appear on the document at the top left hand corner highlighted in blue.

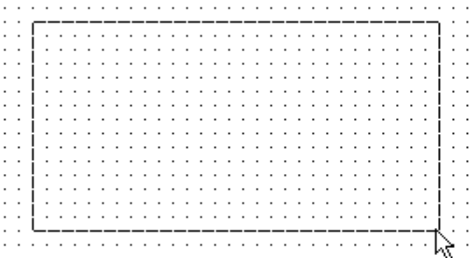


The fields can then be arranged (dragged) and resized (click on a box then drag the handles) on the page as you require.

The field Caption can also be edited by clicking into the Caption property. The position of the Caption can be altered by editing the CaptionPos values (use -1200 for example to move the Caption to the left of the field.

The Data Tool Button

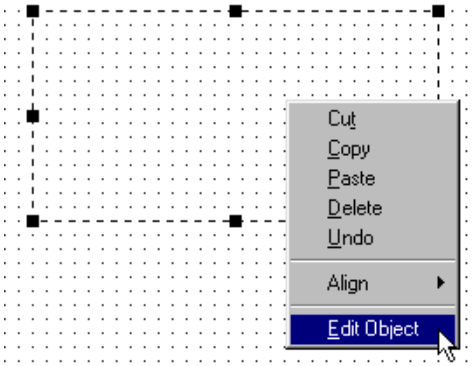
A slightly more involved and lengthy way of adding data fields is by using the data button. The process is as follows:



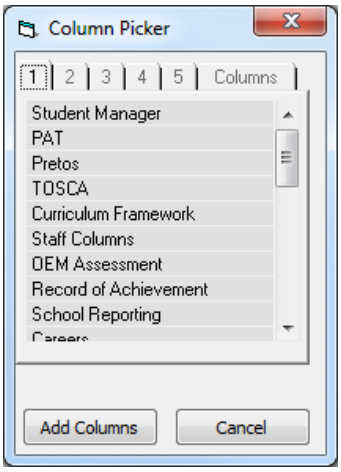
1. Click the Data Tool button

2. On the document hold down the left mouse button and drag over the area where the data entry field will be.

3. Once the data field is the right size release the mouse button and right click within the data field. On the resulting menu click the Edit Object option. The data field has to be edited because it has yet to be connected to a column.



4. The final step in the process is connecting the field to a column. This is achieved by choosing the correct column from the Column Picker that appears from selecting the Edit Object menu option.



Rich Text Objects

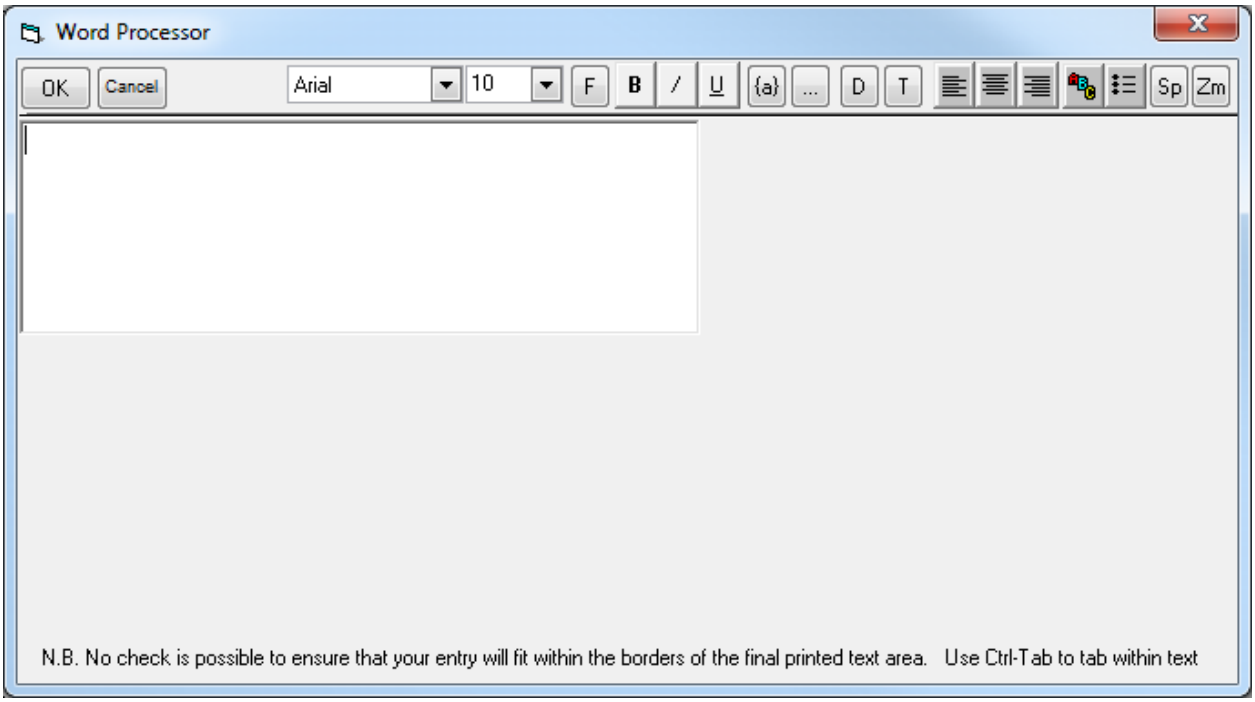


Rich text objects can be used in documents as headings, captions or text, or to merge in existing data.

They are created using the Rich Text Tool button in the same way as a data entry field.

The Word Processor Window

The tool used to edit rich text objects is the Word Processor (also known as the RTF editor). This tool is used in exactly the same way as any other word processor. There is however, one or two specialised buttons that need to be explained.



Here is a list of all the buttons:

OK — Saves and closes the word processor window.

Cancel — Closes the word processor window without saving.

F — Sets the chosen font as the default.

B / U — Allow the font to be **Bold**, *Italic* or Underlined.

{a} — Relates to data that is held in the ClassRoom Manager database and is the mail merge button. This will be explained more later.

... — Comment selection button. Again, this will be more fully explained further on.

D T — Insert the Date and Time.

Control the paragraph alignment.

Allows the text to be coloured

Inserts bulleted lists



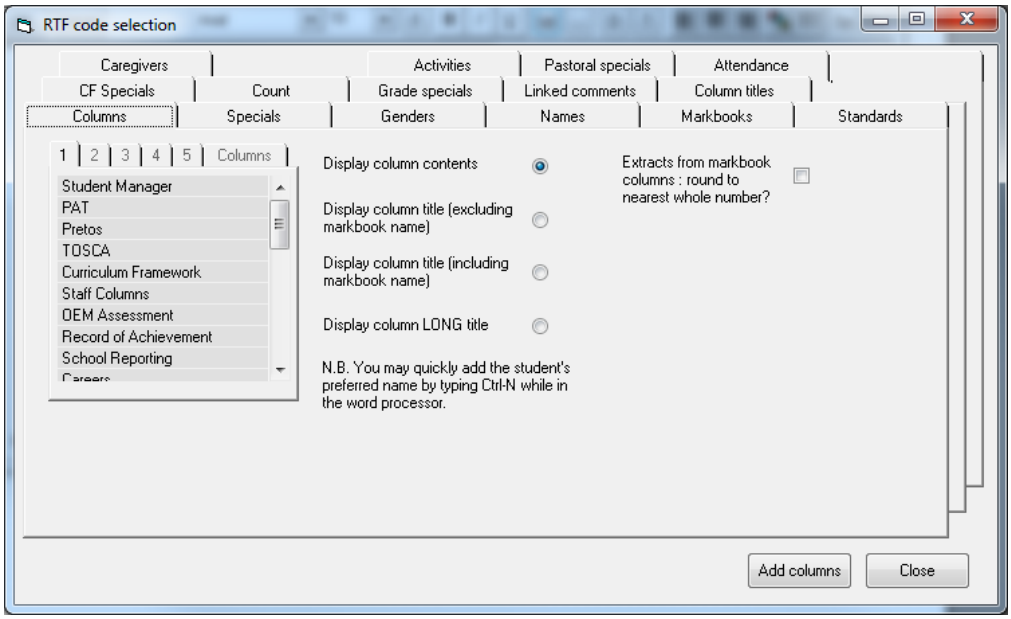
Enables/disables the Spell Checker (misspelt words then appear in red).



The 'zoom' button that toggles the word processor window size. This option allows you to more accurately gauge the size of a text box by opening a text window of corresponding size.

Mail Merge

The mail merge facility allows data stored in the ClassRoom Manager database to appear on a document. Clicking on its button causes the RTF code selection wizard to appear.



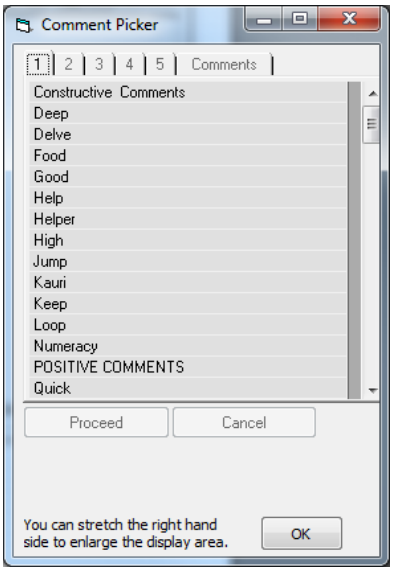
Select a column, then click 'OK' and a code appears in the RTF editor.
{cm.col(3)}

This tells the computer, when drawing this document for a particular student, to 'Go and get the contents of ClassRoom Manager column number 3 and place the text found into the document'.

This functionality is very useful in SM for inserting 'calculated' data such as 'Jan 1st age' or 'Time at this school' from the Specials tab. In CM a wide range of NCEA data can also be merged.

Note: This data is non-editable. Data boxes need to be used if you wish to enter or alter data.

Inserting Comments

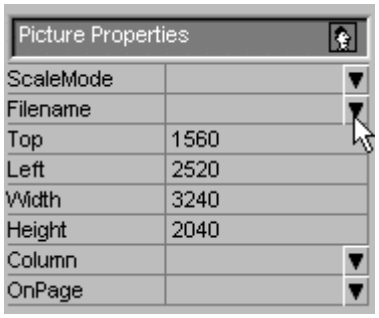


Comments can be simply typed into the RTF editor or, if you click on the comment bank button, the comment bank selection wizard will appear. One or more comments from the bank can then be selected, and they will then be brought into the word processor.

Note: Editing of the contents of Comment Banks is done through CMAdmin.

Pictures

This button allows for the insertion of pictures in documents i.e. a school logo, which have been saved into the CM folder.



Pictures are inserted in the same way as rich text fields but to finish the process the pictures properties need to be edited. Click 'Filename' to select the picture you require.

Most of the popular picture file formats can be imported into ClassRoom Manager including .BMP, .JPG and .WMF.

The other important picture property is ScaleMode. This is where a picture can be cropped or stretched to fit a picture frame.

Lines

Lines can be used to separate sections of a document or to form tables and to create more complex designs within a document.

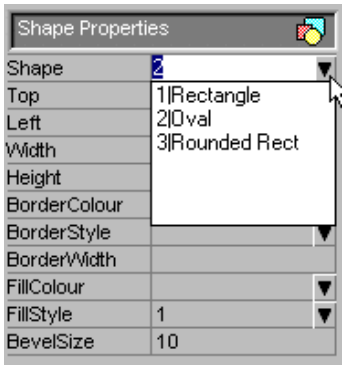


Again, clicking on the line icon and dragging across the page will insert a line. (Click on the page where the line is to start then drag the mouse to where it will end, then release the mouse.)

As with all the other objects, lines have their own set of properties that can be adjusted as needed.

Shapes

Shapes can be added to a document to act as containers for other objects or to provide background shading.



There are three possible shapes, chosen via the first property, 'Shape'.

- Rectangle
- Oval
- Rounded rectangle

Shapes have borders, which may, in turn, have different colours, styles, and widths. In addition, shapes may be filled with any one of several colours in any one of several styles.

Other Objects

- Multi-Option report – Secondary Schools – Create a report linked to markbook columns

- Labels – Used to add labels to a document – including rotated text

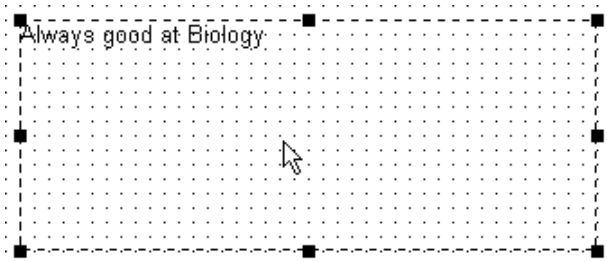
- List Tool – a multi-purpose tool for listing financial items, pastoral transactions, NCEA standards, etc.

- NCEA Reports in several configurable formats.

Document Fine Tuning

Having mastered the techniques of adding the various objects to a document, now go one stage further. Documents may need a bit of further refinement for lots of reasons.

Moving Objects



To move an object, left click on it (for shapes you have to click on or near its border) to select it. Then hold down the left mouse button and drag the object to its new location. You can also use the arrow keys to move an object around.

Copying Objects



To copy an object it first has to be selected as shown before. Then, instead of left clicking on the object right click on it.

NOTE:

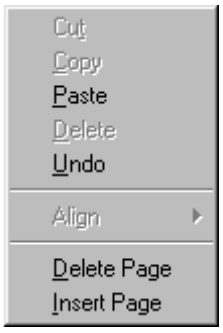
Although the right click doesn't show it the keyboard short cuts for cut, copy and paste are the same as in other Windows programs:

Cut Ctrl-X Copy Ctrl-C Paste Ctrl-V

Deleting Objects

Like all the other refinements that have been discussed you can only delete an object if it selected or highlighted. Once an object has been selected simply press the delete key.

Multiple Page Documents



For documents or reports of more than one page - to add pages to a document, right click on an empty part of the document (Inside a shape is also considered an empty part of a document) and select the 'Insert Page' command. Likewise to delete pages select the 'Delete Page' command.