Staff Manager
User Guide

2014.5.8

MUSAC © 2014

www.musac.co.nz

t. 0800 600 159
f. 0800 500 159
support@musac.co.nz

Contents

1 Copyright / License Agreement 4
1.1 Copyright 4
1.2 License Agreement and Warranty 4
1.3 Conventions used in this manual 4
2 MUSAC Support and Agent Contact Details 5
3 Installation of MUSAC software 6
3.1 Installation of MUSAC software 6
3.2 Overview - installation instructions 6
3.2.1 System Files 6
3.2.2 Staff Manager 6
3.3 Minimum requirements 7
3.4 Server Requirements 7
3.5 Client Requirements 7
3.6 Network Requirements 7
4 An overview of Staff Manager 9
4.1 The purpose of Staff Manager 9
4.2 The components of Staff Manager 9
5 Configuration 11
5.1 Overview 11
5.1.1 Daily Times 11
5.1.2 Duty times and areas 12
5.1.3 Appraisal column headings 13
5.1.4 Keys, Passwords and Buildings 13
5.1.5 Alarm settings 14
5.1.6 Default settings 15
5.1.7 Specifying eMail groups 16
5.1.8 Visible Sections and User-defined screens 17
5.1.9 Leave Reasons 20
6 Editing Staff Details 22
6.1.1 Overview of staff members' details 22
6.1.2 Personal details 24
6.1.3 School details 29
6.1.4 Payroll details 29
6.1.5 Responsibilities 31

6.1.6 Professional development 31
6.1.7 Medical details 34
6.1.8 Timetable 34
6.1.9 Leave 37
6.1.10 Review/Appraisal 38
6.1.11 Duties 39
6.1.12 Qualifications 40
6.1.13 Keys, Passwords, Building access and Laptop details 41
6.1.14 EOTC 42
6.1.15 Notes 42
6.1.16 User defined pages and alarms 42
7 Apply Filter 1
7.1.1 Overview of filtering 1
7.1.2 The filtering process 1
8 Printing Lists 6
8.1.1 Overview of printing 6
8.1.2 Printing lists 6
8.1.3 Printing tables 11
8.1.4 User-defined lists 18
8.2 Designing and printing documents 20
9 Utilities 26
9.1.1 Overview of utilities 26
9.1.2 Duty Roster 26
9.1.3 Import and Export of relief data 27
9.1.4 Archive Management 31
9.1.5 OSH Management 32
10 Alarms 1
10.1 The configuration of alarms 1
10.1.1 The use of alarms 1
11 Day reliefs 3
11.1 Overview of day reliefs 3
11.2 Single teacher entry mode 3
12 Printing Options 25
13 FAQs 35

1 Copyright / License Agreement

1.1 Copyright

The software described herein (hereafter referred to as “the software") is copyrighted and all rights are reserved by Massey University (hereafter referred to as "Massey"). MUSAC stands for Massey University School Administration by **C**omputer.
Copying for the purpose of selling or otherwise distributing the software is a violation of the law.
Copyright © 1998/2010
MUSAC
Massey University, Palmerston North, New Zealand

1.2 License Agreement and Warranty

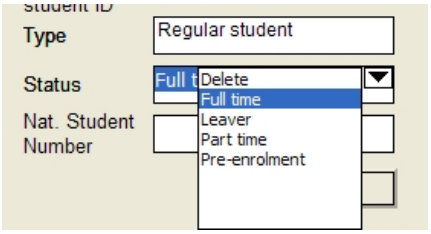
The complete License Agreement and Warranty are available in the Release User Guide which accompanies the release of this software on CD. For contact details, please see our website www.musac.co.nz.

1.3 Conventions used in this manual

Many of the illustrations are taken from the on-line help screens, built in 2003. Some screens have undergone modifications. Where necessary these screens have been recaptured for this manual. In some cases, dates used in illustrations differ from those in the text.

<Enter>	means ‘Press the Enter key’
Ctrl	press the Control key ‘Ctrl’ on your keyboard
Alt	press the ‘Alt’ key on your keyboard

Each chapter begins with an overview of the topics covered therein.



These are popup lists, even though they pull down.

Thanks to teachers around in 1989 at Waiopehu College where an old staff file has been used without gaining their permission. Rory trusted that the use of this file will be seen as a tribute to those teachers.

2 MUSAC Support and Agent Contact Details

MUSAC **Nationwide**

Telephone:	(06) 350 9254	Email:	support@musac.co.nz
Fax:	0800 500 159	Web:	musac.co.nz

Software Support (software errors) **Tel:** **0800 600 159**

Postal: MUSAC PN912, Private Bag 11 222, Manawatu Mail Centre, Palmerston North 4442
Delivery: Room T1:21, Te Ara, Centennial Drive, Hokowhitu, Palmerston North 4410

Product Specialists Sales and Training **North Island**

Email	training@musac.co.nz	Web:	musac.co.nz
Phone:	Bruce Graves on 0800 600 159 option 2		

Postal and Delivery – see MUSAC as above

Solutions & Services Sales and **Training**, Financial Manager Support **South Island**

Telephone:	(03) 331 6210	Email:	admin@solutionsandservices.co.nz
Fax:	(03) 331 6217	Web:	solutionsandservices.co.nz

Financial and Asset Manager Support – nationwide

accountshelpdesk@solutionsandservices.co.nz

Tel:	0800 600 159 (option 4)		
	(03) 331 6213	Fax:	(03) 331 6217

Postal: PO Box 33357, Barrington Mall, Christchurch 8244
Delivery: 99 Rose Street, Somerfield, Christchurch

3 Installation of MUSAC software

3.1 Installation of MUSAC software

MUSAC strongly advises that you seek the services of one of our agents to carry out the installation process for you to ensure that :

1 The installation process goes smoothly and efficiently
2 The software is designed to run in its own directories (eg. \cm) and will only operate correctly if correctly installed.

MUSAC software is sophisticated and does require at least initial training to get you under way. The software is designed to make your school more efficient and this can only be achieved if you understand the correct procedures for the use of the software. To avoid difficult situations we encourage expert advice and assistance.

3.2 Overview - installation instructions

3.2.1 *System Files*

Install the **system files** from the CDRom supplied on to every computer which runs MUSAC software, including remote machines.

3.2.2 *Staff Manager*

For installation of MUSAC software to the file server tick to ensure Staff Manager is installed.

NOTE: If another user, elsewhere on the network, is currently using Staff Manager it is entirely likely that everything in the installation process will be installed EXCEPT the main program itself. Please ensure that, when you install MUSAC software (even an update) that NO users are currently running the program.

Staff Manager MUST be installed into a \CM directory, even if your school does not own ClassRoom Manager. Both packages share the same files and ClassRoom Manager certainly expects to find the staff database (staff.mdb) in a \CM directory.
The \cm directory can be a subdirectory off an applications directory however if you already have either ClassRoom Manager or Student Manager running, you MUST install into the existing directory. Ensure that you select the root directory which holds your \cm directory, ie. not C:\CM\CM

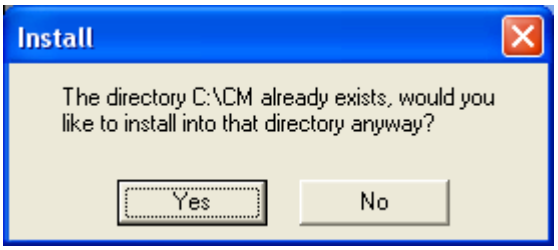


Illustration 14 : You've found the correct existing directory

Click 'Next' again, and the installation process should proceed smoothly, and quite quickly.

3.3 Minimum requirements

The following are the recommended and minimum system requirements for running MUSAC software. If you are purchasing or acquiring hardware you should use the recommended hardware levels combined with your anticipated future needs. See our website for current minimum requirements.

3.4 Server Requirements

See our website www.musac.co.nz for our latest software recommendations.

3.5 Client Requirements

Recommendations for our latest software are available on our website: www.musac.co.nz.

3.6 Network Requirements

Please contact your local MUSAC agent if you have queries about whether or not a specific hardware configuration is suitable for use with MUSAC software.

For further advice on your network, including advice on who to contact for Infrastructure auditing, please contact MUSAC or our agents.

Recently some schools have been using Terminal Services to operate our software very successfully on Apple computers. You need sufficient hard disk space to hold the various components and the database itself. The more memory your machine has the better the programs will operate.

See our website for the latest product requirements.

The screen will display the message 'Checking structures and loading data…' as shown below. From time to time you may also see the flood panel shown. This indicates that we have released updated versions of the configuration files which include, for example, the official Ministry of Education codes for various items, eg. the list of schools. This process is installing the updates into the main database.

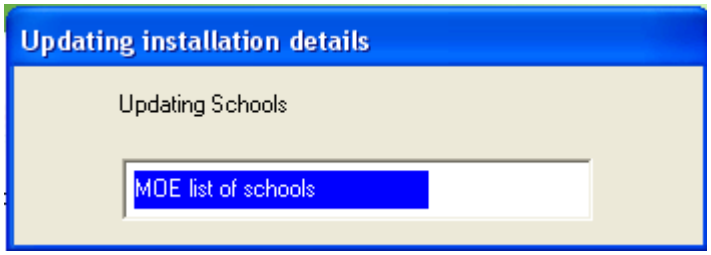


Illustration 30 : Updating the database with the latest MOE codes

‘Structure tests’ are performed each time you enter the software, and it is at this point we ensure any changes to the structure of the database which modifications and enhancements require, are made. The fact that each test has been successfully performed is recorded in the CM database to ensure that unnecessary delays do not happen on future entry.

4 An overview of Staff Manager

4.1 The purpose of Staff Manager

Staff Manager is designed to make it easy for those responsible for the management of information relating to staff members to keep a track of all of the various details in one central location, and to generate lists, arrange reliefs and other processes relating to staff members. The data for Staff Manager is held solely within the staff database used by ClassRoom Manager and Student Manager. This database is expanded a little to hold all of the extra information.

4.2 The components of Staff Manager

Staff Manager comes in a single program, titled st.exe.

All functions and utilities are accessed from the one central screen, shown below.

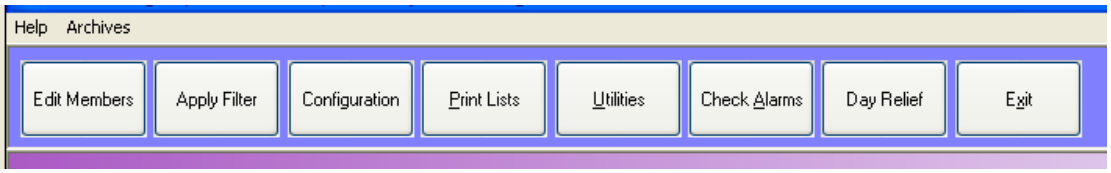


Illustration 1 : The main screen

Edit members

All of the details relating to individual staff members can be viewed and/or edited.

Apply filter

This process allows you to select a particular group of staff members. Once a filter is in place, then, until the filter is cleared again, only those staff members in the filter will be seen in the editing process. The members of the filter may also be selected (as a group) for the basis of list and document printing.

Configuration
This is where you can specify all of the default settings which make the package adapt to your school environment.

Print lists

This process allows you to print any of the pre-designed lists, tables and documents, and to design further lists and documents of your own.

Utilities

The utilities available in Staff Manager include :

Specifying the duty roster
Importing and exporting staff related data

The management of staff archives
eInput – the Staff Manager version of the ePayments process from Pay Serve.

Check alarms

From Configuration, turn the alarm process on, specifying for example the number of days in advance which you wish to have the process identify certain key dates relating to staff members. These dates include visa expiry dates, contract expiry dates and, optionally, their birthdays.

This button will flash a red dot on entry to the module if one or more dates trigger the alarm.

Day relief organiser

To arrange day reliefs this utility includes the recording of all of the information necessary for the submission of your relief/leave data to Pay Serve.

Each of the processes is a new section.

5 Configuration

5.1 Overview

The configuration area is accessed via the Configuration button at the top of the main screen. The settings made will be used in the following chapters.

This button reveals eight configuration areas, each of which is accessed by clicking on the relevant button. They have been moved to two columns for this illustration.

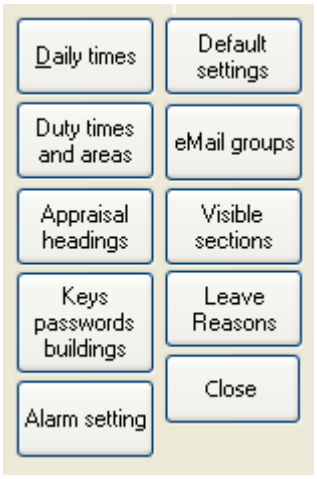


Illustration 1 : The configuration buttons

5.1.1 *Daily Times*

Specify the times used in determining the total hours for part-time teachers. One of the data screens allows you to use a calculator to determine the total hours worked by each part-time teacher. The time slots which you specify here will be displayed and you can click on each area for each day to have the total time calculated.

Illustration 2 : The time slots

You may use this screen to set up the time slots and their number of minutes. These are NOT used in the allocation of daily reliefs which have a wider range of possibilities including split periods and duty slots.

5.1.2 *Duty times and areas*

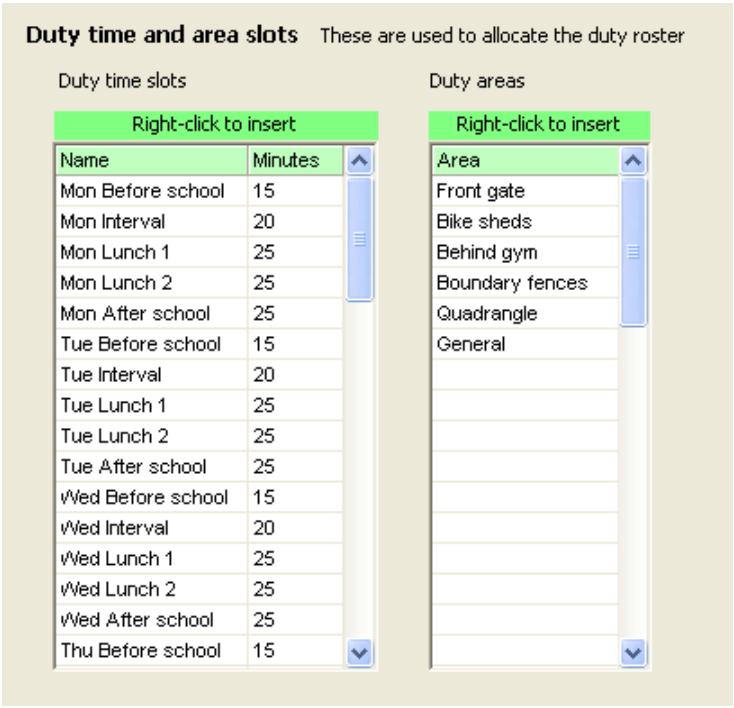


Illustration 3 : Duty times and areas

Specify various duty times and their areas, and alter the settings to your own requirements. These will be used in allocating duties to staff members and, optionally, in the allocation of reliefs.

5.1.3 *Appraisal column headings*

The process of reviewing or appraising staff members is done through the member's data screens. Each of the various categories of staff member (Teacher, Ancilliary staff, Caretakers, Cleaners etc) can have their own format of appraisal column headings. This is where that specification process occurs.

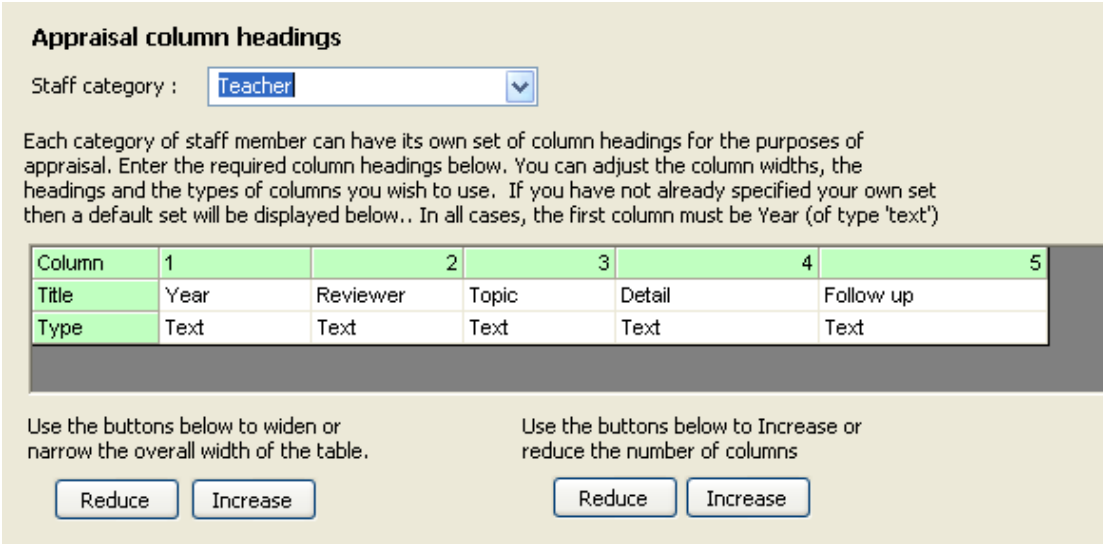


Illustration 4 : The appraisal column headings

Select the designation in which you are interested and their current columns will be displayed. Using the on-screen possibilities you can adjust the number and width of the various columns, as well as specifying their titles and their types. Type is selected from 'Text', 'Date', 'Tickbox', or 'Comment'. (Numeric data would be stored in a 'Text' field).

You can also click the button at the bottom to apply your column headings to another designation. If you have a set of column headings which you wish to use for another category then display the set which you wish to copy then click on the button at the bottom of the screen to 'Use these headings for another category'. When you select the desired category, the new headings will be offered.

5.1.4 *Keys, Passwords and Buildings*

The screen below allows you to specify the details relating to the various keys, passwords and buildings which can then be recorded as being held or accessed by members of staff.
It is very important to know which members of staff have the various passwords used around the school – particularly on the computer network. The passwords themselves are not recorded here (unless you chose to do so via their descriptions). Some schools have lost the only person who knew the password to the school's network configuration area either leaving teaching, or the country!

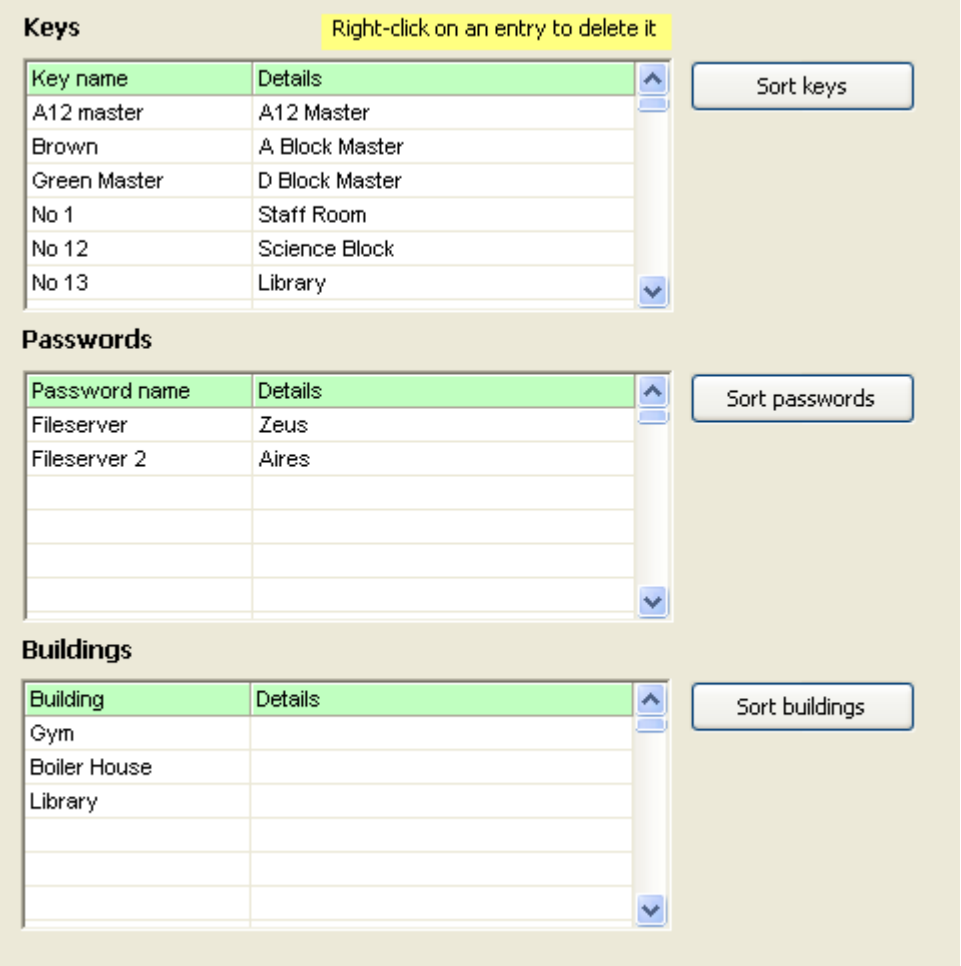


Illustration 5. Keys, passwords and buildings

5.1.5 *Alarm settings*

If you have switched ‘alarms’ ON then, each time you enter the program, or on request, the program will check for any dates relating to events which are due to occur in the next xxx number of days. (xxx is the number specified on the screen below).

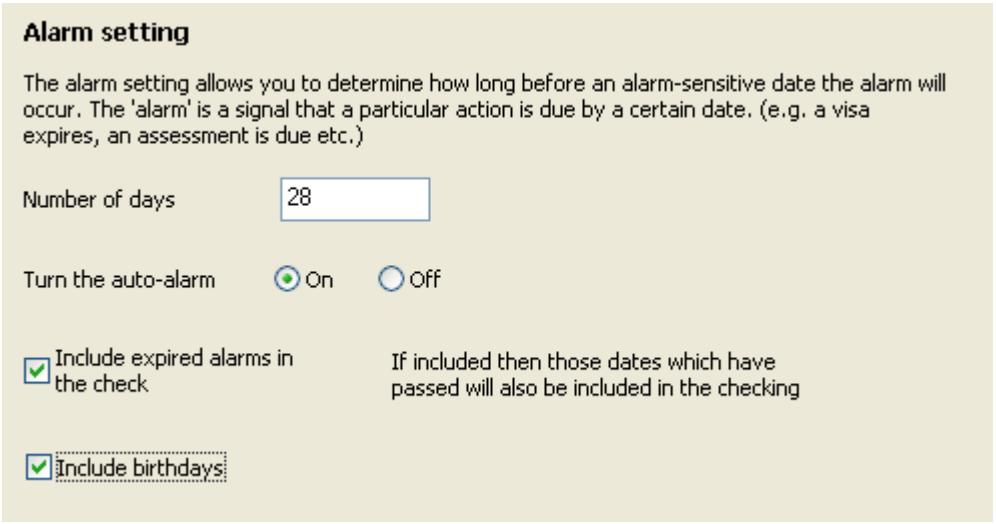


Illustration 6 : Alarm settings

On this screen you can specify

a The number of days in advance which upcoming dates will be listed.

b Whether the auto-alarm is turned off or on. If it is turned ON then, each time you enter the package, the database will be checked for upcoming dates within the specified number of days and, if any are found, the 'Alarm' button will begin flashing....

c Whether or not you wish to include recently passed dates (expired alarms) in the search.

d Whether or not you wish to have the check include staff members' birthdays.

5.1.6 *Default settings*

As seen on the screen below, there are five default settings.

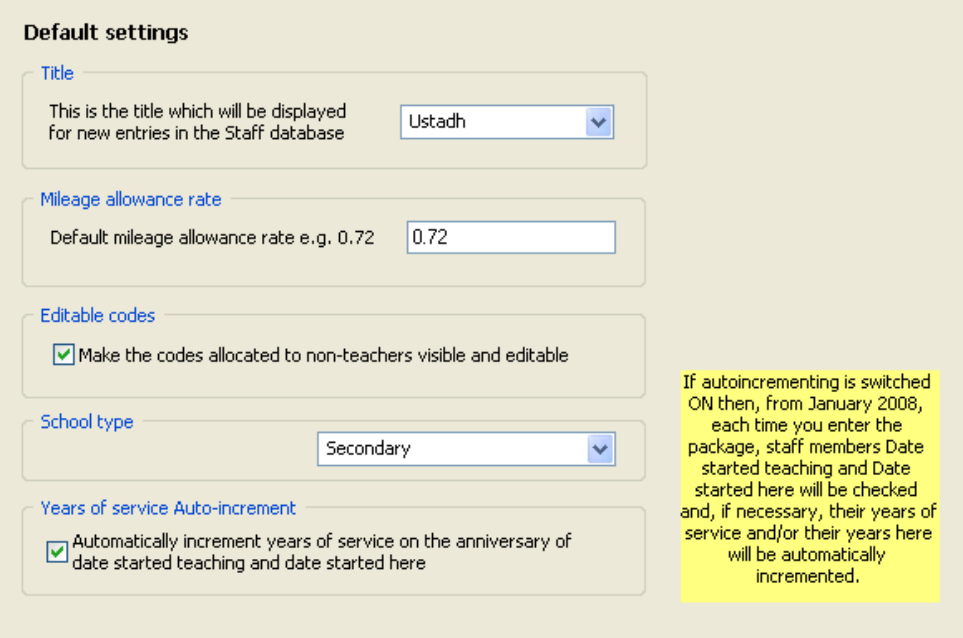


Illustration 7 : Default settings

1 Title

This is the default title which will automatically be allocated to new entries in the staff database.

2 Default mileage allowance rate

This is applied to staff members using their own cars to attend professional development courses.

3 Editable codes

Indicate whether or not codes allocated to non-teachers and relievers should be visible and editable.

4 School type

Indicate what type of school your school is.

5 Years of service auto-increment.

You can have staff members' years of service (here and teaching) automatically incremented on the anniversaries of the start date and date first attended here.

5.1.7 *Specifying eMail groups*

You can send emails, eg. the list of daily reliefs, to one or more staff members by making staff members of eMail groups, and the documents are sent (as PDF attachments) to each member of the group or groups selected.

The screen below displays the process of creating of and adding members to a group.

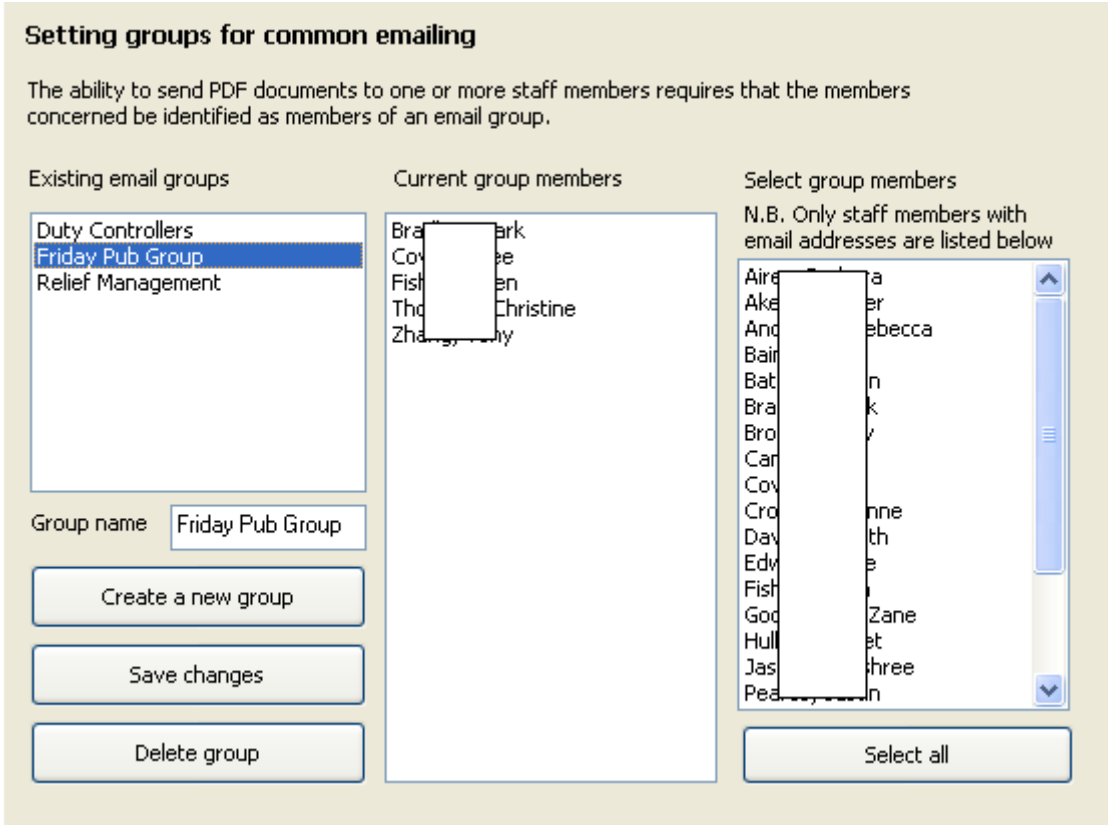


Illustration 9 : Specification of email groups

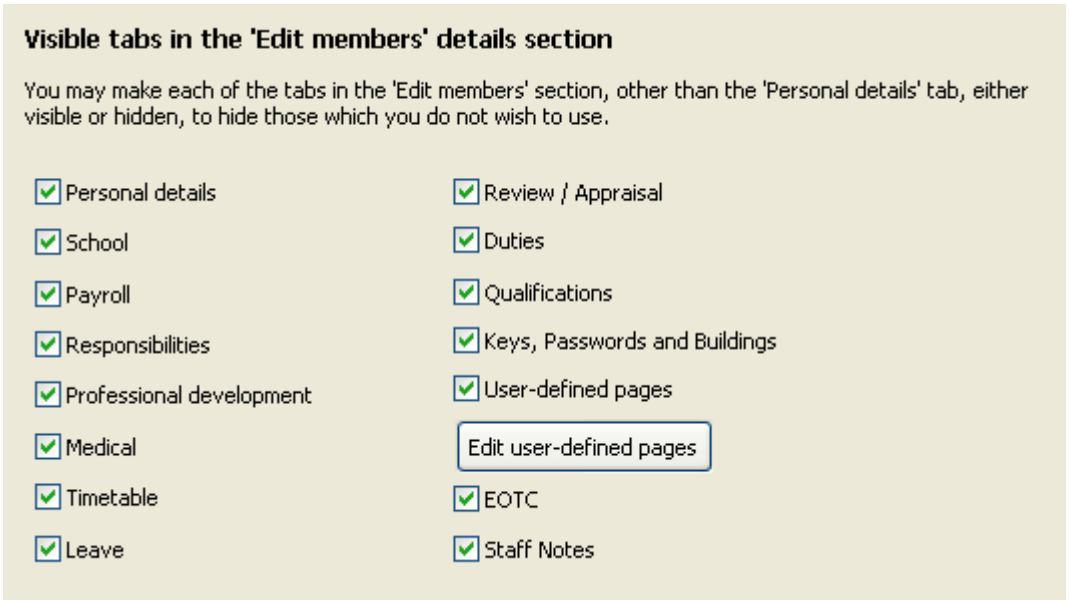
To create a new group, click 'Give the group a name', and select from the staff members listed on the right of the screen. This list only displays those staff members who have had an email address specified.

Select group members from the list on the right of the screen either by clicking on the individuals or by using the 'Select all' button at the bottom of the list. Re-selecting a staff member allows them to be removed from the group.

Above you can see that there are three members of the 'Senior staff' group.
Group memberships may be edited, and groups may be deleted.

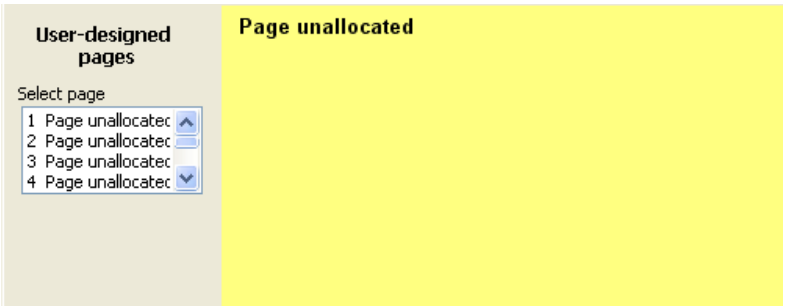
5.1.8 *Visible Sections and User-defined screens*

You may have individual tabs on the Staff Details screen made globally invisible if, for example, you have no interest in recording details relating to eg. EOTC.



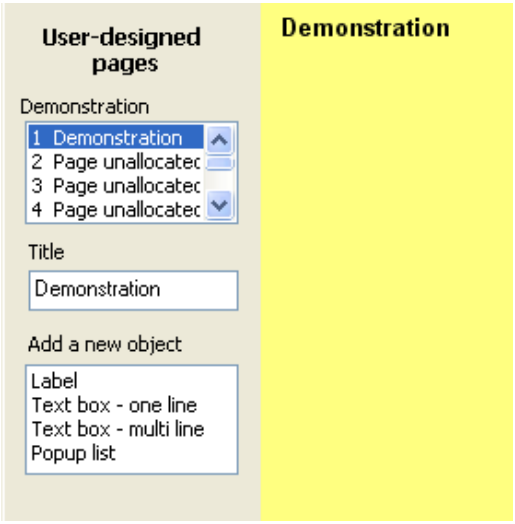
If you untick one or more tick boxes then the corresponding staff member detail screens will not be available.

User-defined pages
It is possible to design your own screens with your own data fields on them. Click 'Edit user-defined pages' for the following screen.



The left list shows the names of the pages already defined. You can define up to twenty screens of your own. To begin a page, select the first unallocated page.

Give your screen a name, via the 'Title' text box. For example 'Demonstration'. After entering the name it will appear at the top of the page and in the list of pages, as shown below.

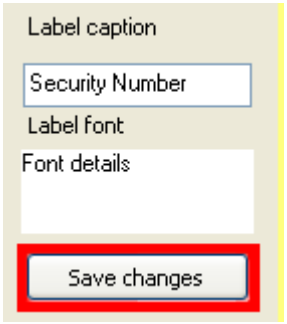


There are four items which you can place on the page, and you may have as many as you wish of each. The following explanation has at least one of each item.

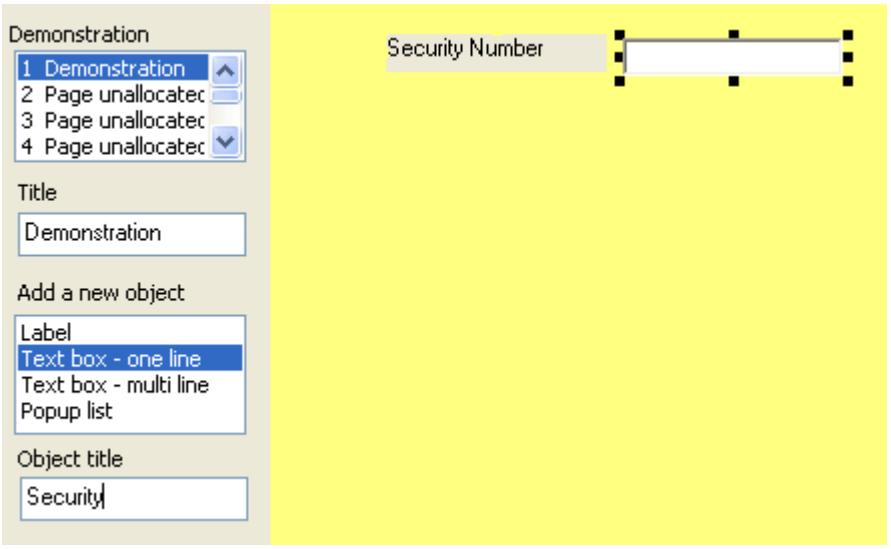
1 Label

Click on 'Label' and a label will appear behind the page name…

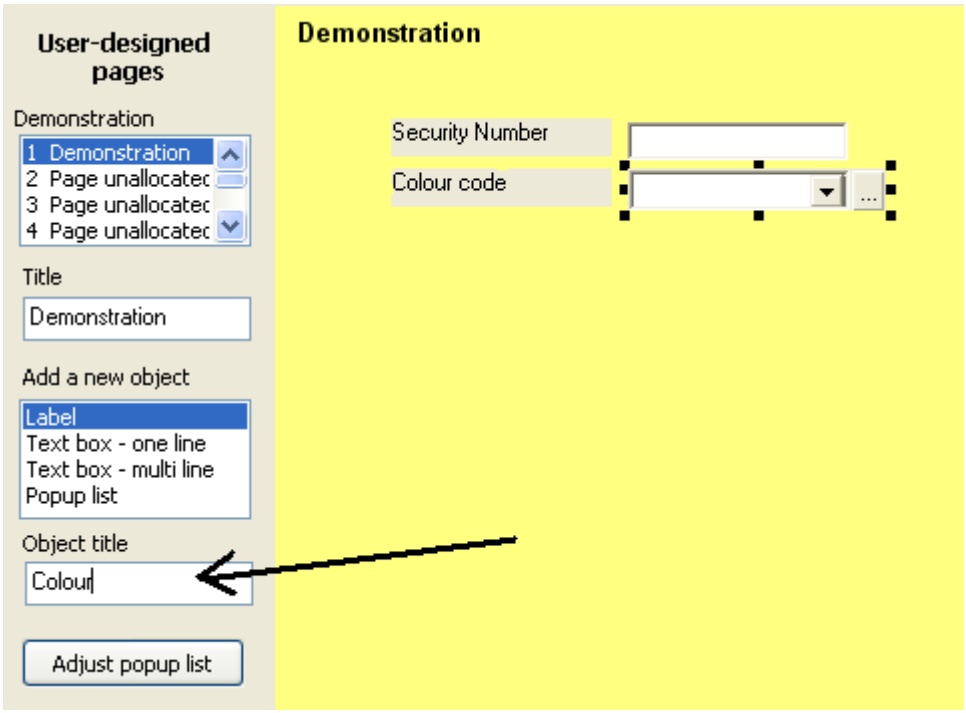
Click on it then drag it into position on your page then enter your required caption in the text box at the bottom left of the screen. 'Security Number' has been used as the demonstration, as shown below.



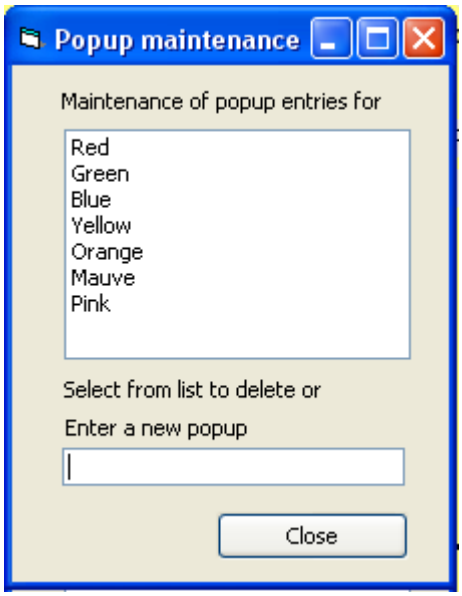
Now a text box for the entry of each staff member's security number. Select 'Text box, one line' from the list and drag the resulting object into place on your form. Then give the new object a simple name, under which the data will be stored in the database. 'Security' has been used below.



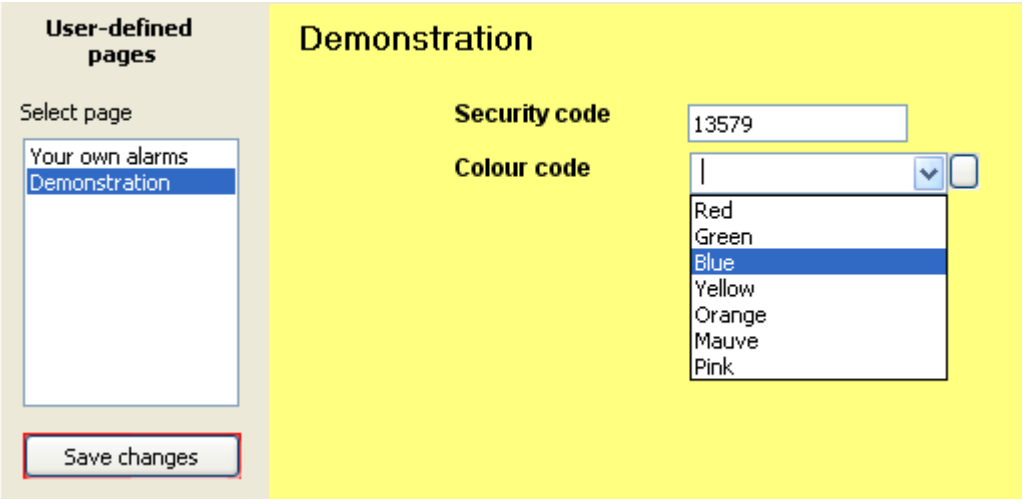
Now add a second label, given the caption 'Colour code', and a popup list to go beside it. The Popup list has been given the name 'Colour'.



You will notice that the popup list includes a small '3 dots' button. Later, when viewing the screen during data entry you will be able to enter the various possibilities for the popup list by clicking on this button. In the meantime, while in the design process, you can do the same by clicking on the button labelled 'Adjust popup list', as shown below.



Type each possibility into the text box at the bottom of the small window and press the <Enter> key. Enter all of the possibilities.
There is one further object which can be placed on a user-designed data screen – the text box – multi line. This is a text box which allows the user tp type in more than one line of text.
Finally, click on the 'Save changes' button and your page will be saved, ready for use. This use and an example of the screen's appearance is shown below.



5.1.9 *Leave Reasons*

You can send emails, eg. the list of daily reliefs to one or more staff members.
There are three types of leave, and each has its own set of leave reasons. Initially these were set to those specified by the school payroll service, but as further reasons pertinent to individual schools were requested, the functionality was added to 'Configuration'.
Select the type of leave at the top of the screen, then enter your required reasons on to the list below, using the text box under the list to enter each reason.

Edit Leave reasons
Annual Leave
Sick Leave
Discretionary Leave
Anticipated Sick
Disregarded Sick
Emergency Sick
Even more sick
Really very sick
Serious Illness
Sick
Type in a new entry below and press <Enter> to save it

6 Editing Staff Details

6.1.1 *Overview of staff members' details*

Click Edit Members (from the menu bar) for Staff members' details.

Note that use of the Options menu allows grid mode view:

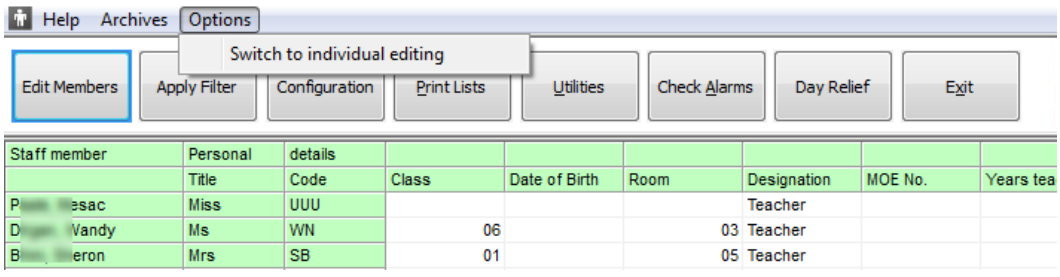


Illustration 1 : The main data screen

Along the top of the main screen are all the main feature buttons and you may jump directly to any of these, which will exit from the editing screen, but it is safe to click on any of the buttons. These remain visible behind all of the main functions, except 'Daily reliefs' which has its own screen. Below the main buttons are the tabs which take you to each of the areas concerned with the particular staff member displayed.

Illustration 2 : The data tabs

On the left of the screen is a blue bar 'Staff Selector – Click to Select'. At the bottom of the screen are:

Illustration 3 : The 'bottom row' buttons

1. 'Add a new staff member' clears all details relating to the current staff member and provides you with blank entries to add a new staff member.
2. Through 'Delete selected member' delete the currently displayed staff member.
3. 'Save changes' changes its colour to a background red whenever you alter any of a member's details, alerting you to the need to save the changes you have made before leaving or moving to another member.
4. 'Print Document' to print a (previously designed - see Printing Utilities) document relating to the currently displayed staff member. One of these documents is provided for you and prints ALL details for the selected member.
5. 'Search' moves to a particular staff member. When you click 'Search', (or press Alt-S), a small search screen appears.

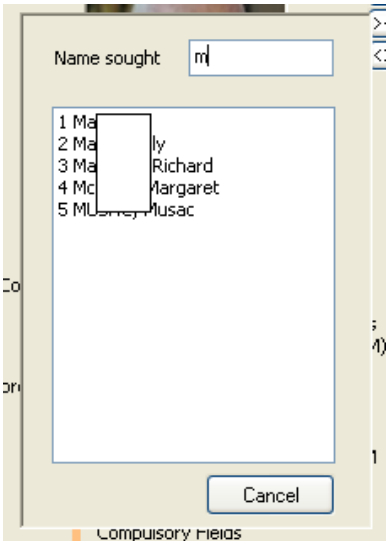
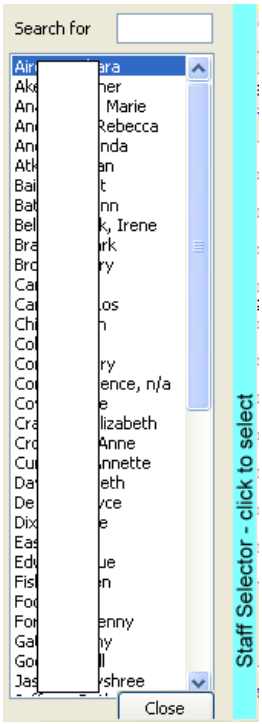


Illustration 4 : Searching for a staff member

Type in the first letter (or more) of the member's surname and all of those matching will show. Either click on the required member or press the corresponding number key and you will return to the display with your selected person being the currently displayed member. Using Alt-S, a couple of letters, and a number you can quickly move to any member of staff without touching the mouse.

Returning to the blue panel down the left edge of the screen, if you click on it then a full list of all staff members will slide out.



Click on the staff member you wish to view. You can, if the list is very long, enter the first few letters of their surname in the box at the top of the slide.
The Alt-S method of moving to a staff member is the fastest.

There are three further buttons in the bottom right-hand corner of the screen.

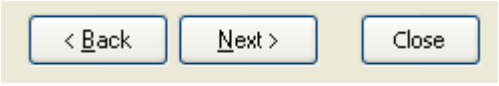


Illustration 5 : Navigation buttons

'Close' shuts the current screen down, leaving just the top menu displayed.
The other two allow you to move to the previous and to the next member on file. You can also access these members without using the mouse by pressing Alt-B (back to the previous member alphabetically) or Alt-N (to move to the next member).

Please note that all of the data displayed in the following data screens is entirely spurious and was entered during the testing phase of the module.

6.1.2 *Personal details*

The personal tab shows four sub-tabs, shown below. Whenever you first enter the editing area, the first of these tabs will be displayed. It shows some basic details relating to the staff member. The teacher's class has a drop down field to assist in avoiding data entry errors.

Personal

Illustration 6 : The personal details screen - Personal

Those which might require clarification are:

a Designation

There are a number of designations already in place. Two of these, 'Teacher' and 'Reliever' are essential and should not be changed. The smooth working of various parts of the software depend on these two designations.

If you do require more, click on the small '3 dots' button to the right of the designation pull-down and you will be able to alter, add to and delete from the list of designations. This process, where you can adjust possibilities within Staff Manager, is available for several of the pull-down boxes. You can see two others next to 'Title' and 'Marital status' above.

b Code

Each teacher and reliever must have a unique alphabetic code. Again, this is used elsewhere in Staff Manager, particularly relating to daily reliefs. All other designations will automatically be allocated a numeric code which you never see. You can view the allocated codes via 'View codes'.

c The member's photograph

To attach a photograph to a member, right-click in the photo area and a dialogue will appear, via which you can select, resize, crop and otherwise adjust the photo for each staff member.

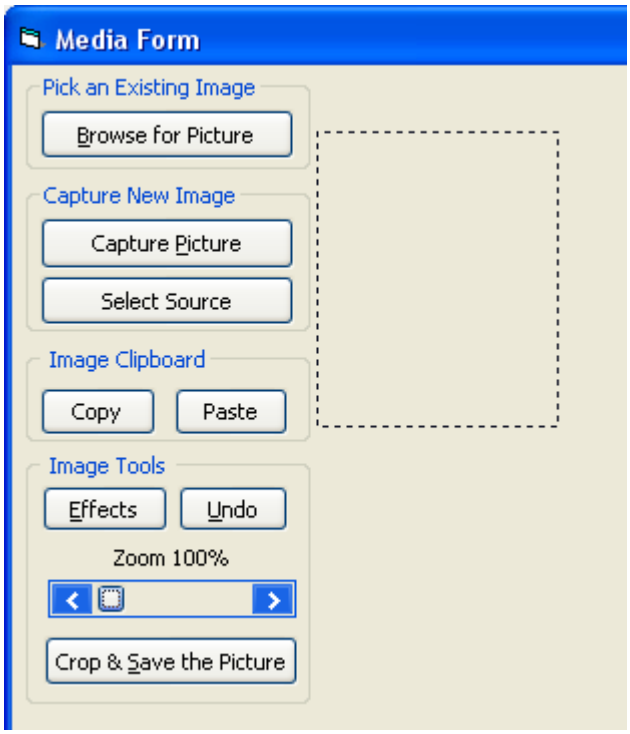


Illustration 7 : The photograph selection window

Above is the photo-capture screen. The normal process is to click on 'Browse' and identify the required photograph (which should be stored in the '\cm\staff photos' subdirectory). Once selected, you can resize it using the Zoom control, and re-crop it by dragging the dotted rectangle over the required area. When you are satisfied, click on 'Crop and Save the picture' and the member's photo will be saved into the 'Staff photos' subdirectory.
To the right of the photo are four small buttons which may be used to resize the photo image area.

The resized area will be 'memorised' and will be subsequently used to display and select photographs.

d Entry code and password

These two fields are used to provide the information which the staff member will subsequently use to enter this package – provided that they have the right to do so. (More on rights follows).

Note the small message in orange which indicates those fields which have an asterisk beside them are compulsory fields. If you are entering a new staff member you MUST provide entries in each of these fields. There are two further compulsory fields on the CM/SM tab.

Contact details

Illustration 8 : Personal details - Contacts

The ‘Contact details’ sub-tabs records the staff member’s contact details, along with those of his or her partner and emergency contact details. If the partner is the emergency contact, click on 'Copy from partner' and the relevant details will be duplicated.
Make contact by: You have a choice of Post or email. Elsewhere in Staff Manager it is possible to print address labels for just those who have 'Post'. If a member is a teacher or reliever then details relating to reliefs arranged which involve this member can be emailed directly to them.

Other details

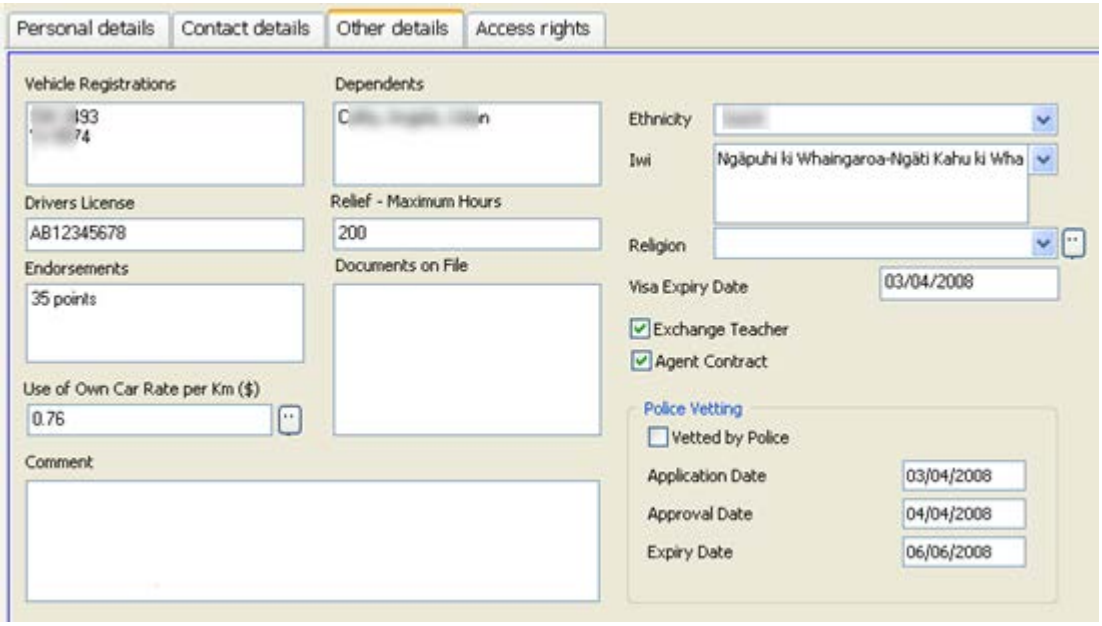


Illustration 9 : Personal details – Other details

The 'Other details' tab holds a number of details relating to the staff member, including information concerning exchange teachers, their visa expiry date and whether or not they have an agent contract.
The entry in 'Use of own car' is used to calculate the cost of attending professional development courses on the relevant tab (see 'Professional development' below).

Access Rights

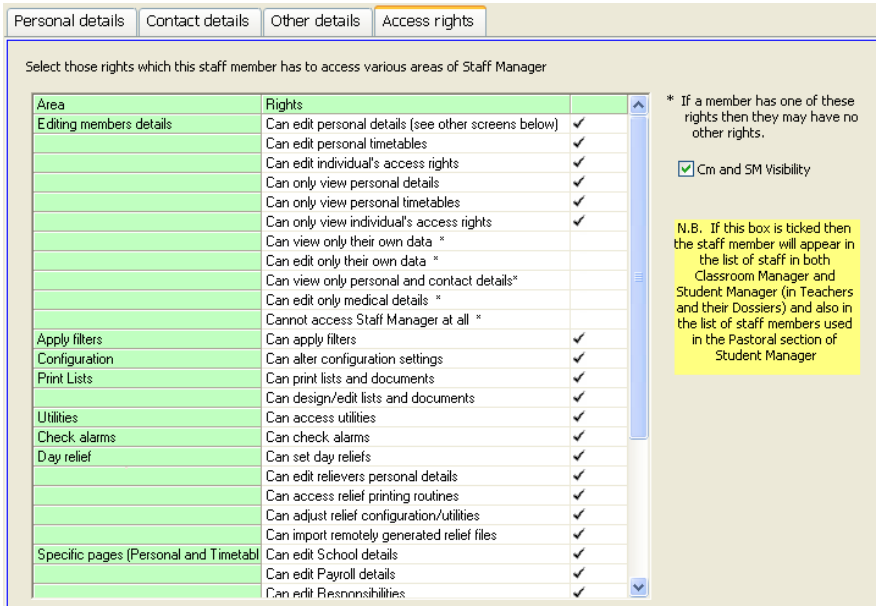


Illustration 11 : Access rights

Each person gaining access to Staff Manager must have one or more of the possible rights listed above. Note that some rights are exclusive. If a staff member has ONE of the asterisked rights (and they can have only one of them) they may have no other rights.

The last of the editing rights provides access for a staff member to just his or her details. At least one person MUST have the right 'Can edit individual's access rights'. For example see the top of the screen as seen by someone who has entered with just this right:

Illustration 12 : Restricted rights

They will also find that the button to save any changes has also been disabled, as shown in the full screen below (even though it still has a red background).

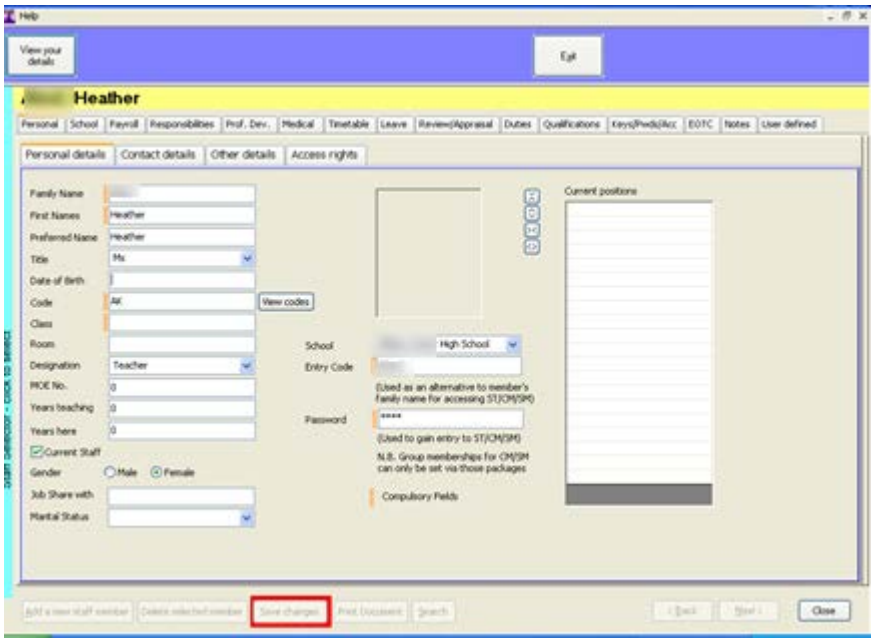


Illustration 13 : Disabled saving changes

6.1.3 *School details*

The 'School' screen appears as shown below.

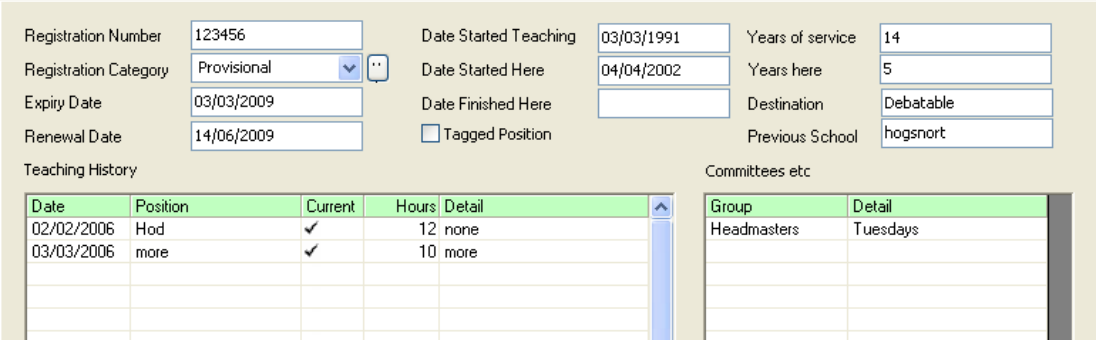


Illustration 14 : School details

On this screen appear details relating to the member's Teacher Registration Number and various dates associated with their position.
Below these fields are two tables. The left side can be used to record the member's teaching history and the right hand one to record details of committee memberships and the like. Teaching history details are also recorded, differently, under the 'Responsibilities' tab.
The 'Renewal date' entry is subject to the 'Alarms' system which operates within the package. It is possible to have the package alert you to upcoming important dates. See 'Alarm setting'.

6.1.4 *Payroll details*

The ‘Payroll details’ tab reveals information relating to the staff member's employment and payment details.

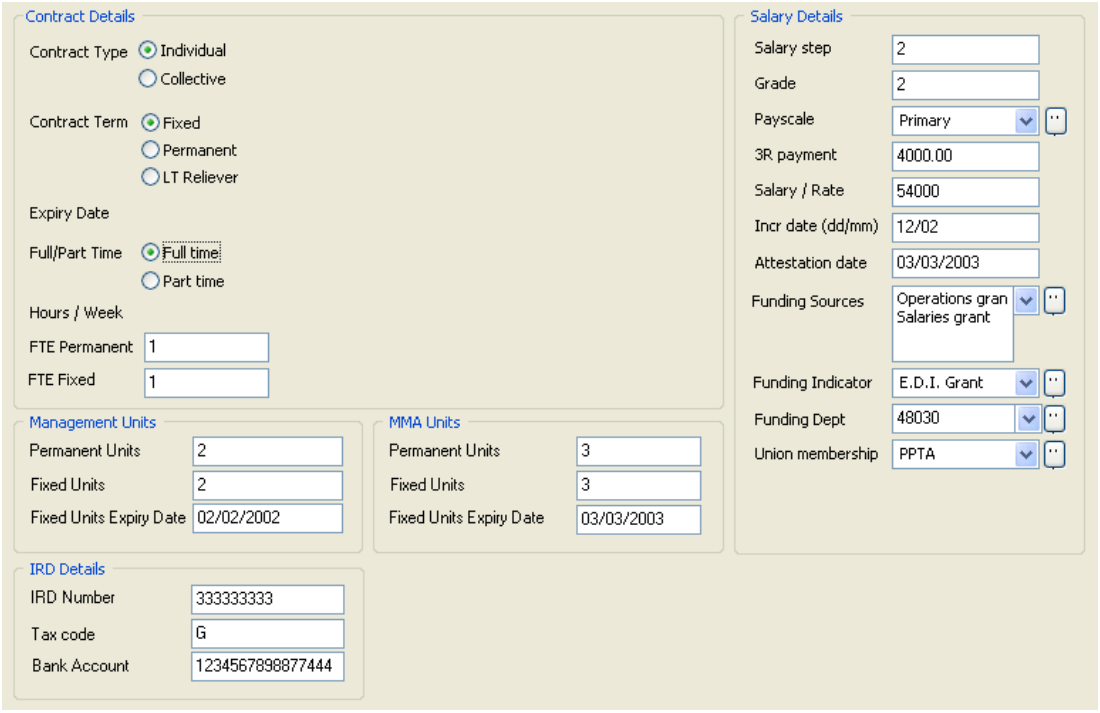


Illustration 15 : Payroll details

Some details may not apply to individual staff members. In the example above, the staff member is full time and is on a salary of $54000. If they were part time then an 'Hours calculator' appears in the open space above.

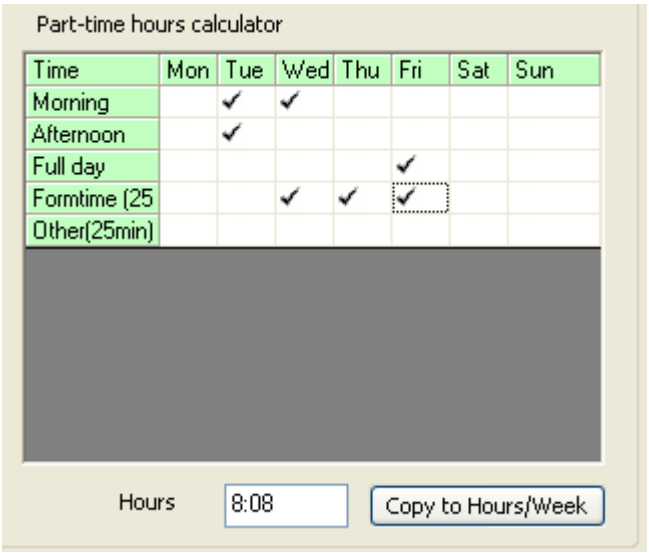


Illustration 16 : The ‘Part time’ calculator

As you click in the various cells in the right table, the total hours are calculated and displayed below. You can set your own time slots and times under 'Configuration'. Once you have completed the task, and are happy with the total hours, click 'Copy to Hours/week' and the number of hours will be transferred, as shown above, to the 'Hrs/Wk' field. In the case of a part time employee then the salary / rate field should be altered to display their hourly rate. (This is used elsewhere in the calculation of relievers' payments.)

6.1.5 *Responsibilities*

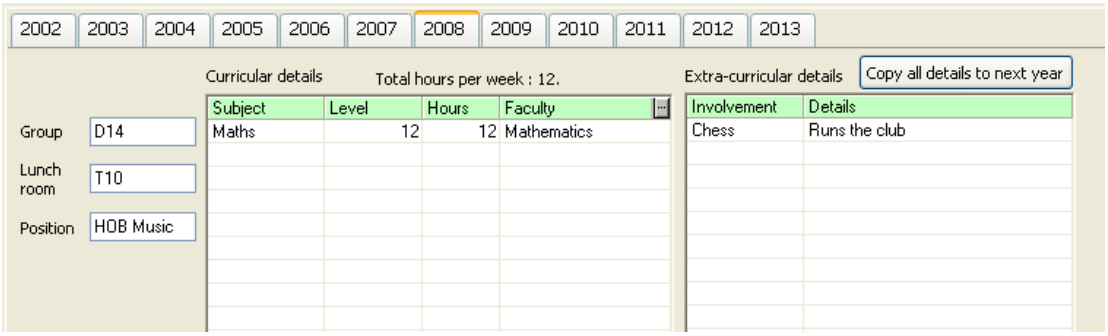


Illustration 17 : Responsibilities

This page records the teacher's teaching and extra-curricular activities. The data in the 'Faculty' column provides the basis of faculty lists via the Printing utility, and the small '3 dots' button at the top of the column allows you to adjust the various faculties. Some schools have switched from the traditional subject faculties to those based on Essential Learning Areas. These schools can delete the default set and replace them with ELA based entries. At the top of the area is a row of tabs which reveal separate screens for each year, and the orange button enables you to make a complete copy from the current year to the next year at any time.

6.1.6 *Professional development*

This tab allows you to keep a tab on each member's professional development. You can record the various courses which they have attended, along with the associated costs. The width of the table means that the use of the horizontal scroll bar is necessary. Shown below are two illustrations. The first shows the left side of the table and the second, the final nine columns.

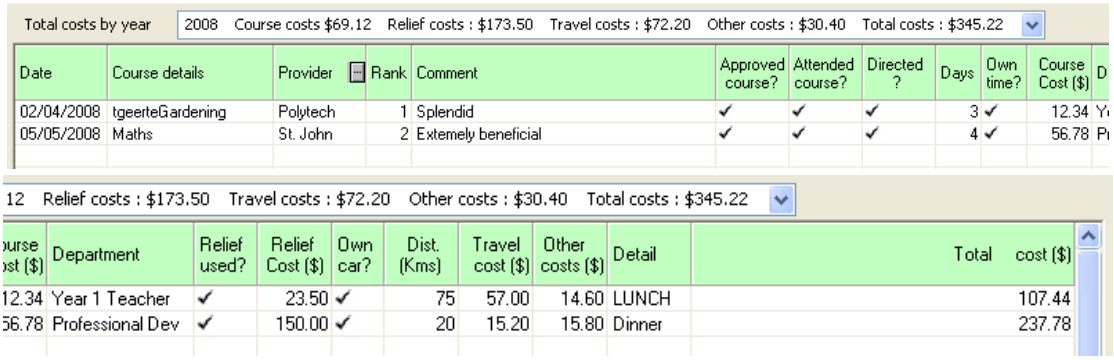


Illustration 18 : Professional development

You can add your own providers (using the small '3 dots' button), as you can for the Distance column. When you click the '3 dots' then, as usual, the relevant list is presented for editing.

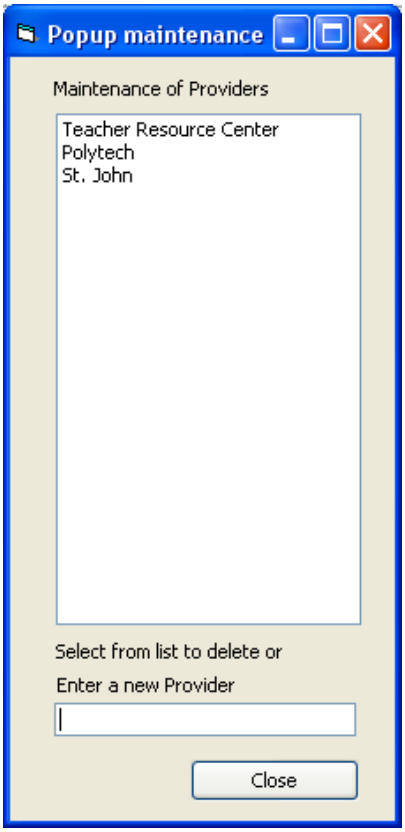


Illustration 19 : Maintaining the Prof. Dev. Providers list

Enter a new provider at the bottom and press the <Enter> key. To edit an entry, select it from the list, delete it, and re-enter it.

The 'Department' column has been added to enable a list of Professional development sorted by Department to be printed. This list is populated by the official department headings from PayServe, but you can also add your own entries (via Day relief / Configuration / Funding Departments.

Click the 'Distance' column for the following popup-list.

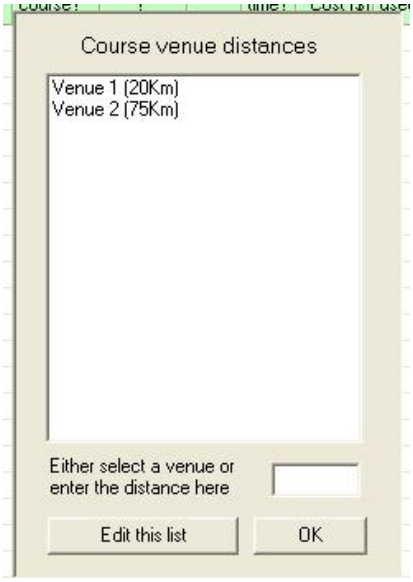


Illustration 20 : The travel distances popup

Enter your own venues and their distances as shown. Then, when you select one, the associated distance will be recorded in the 'Distance' column, and the distance multiplied by the member's 'rate per Km' as entered in their personal data screen, and the result displayed in the 'Travel cost' column. The four cost columns are automatically totalled to show the total cost of the course.

At the top of the window is a pull down box which displays the cumulative totals for the staff member each year.

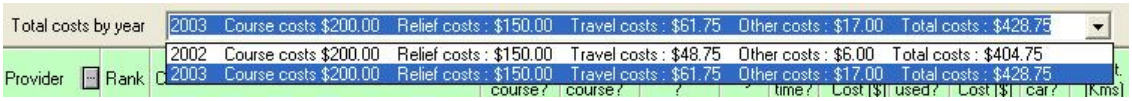


Illustration 21 : Annual Prof. Dev. totals

6.1.7 *Medical details*

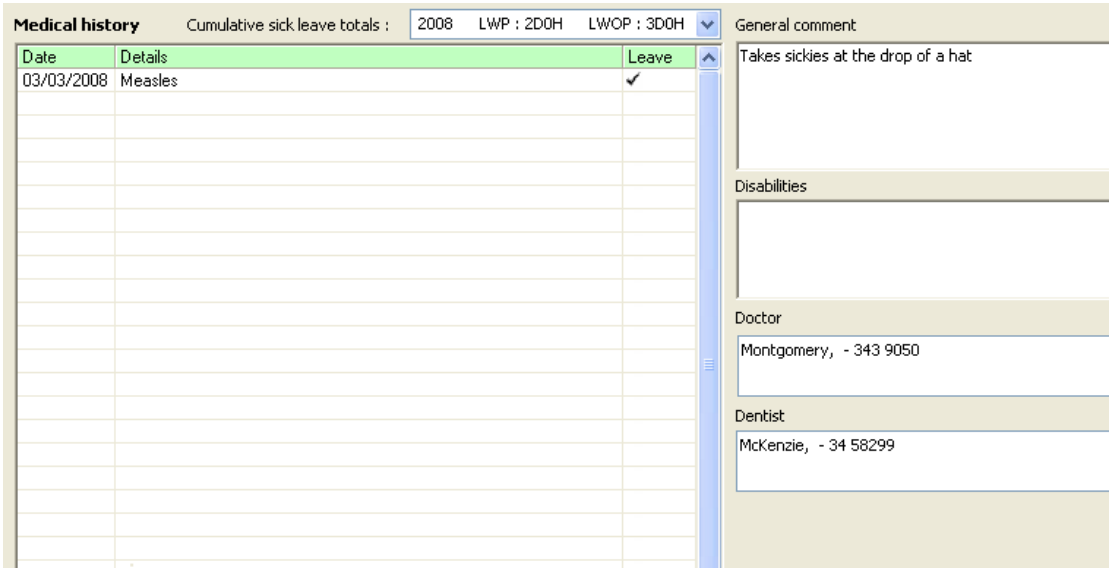


Illustration 22 : Medical details

There is room to record a complete medical history of each staff member. You can also record their doctor and their dentist, adjusting each list via the '3 dots' buttons attached to each field.

6.1.8 *Timetable*

You can display a teacher's timetable for either primary or secondary schools. (Some intermediate schools operate a 'secondary' type timetable while others prefer a 'primary type'.) The first illustration below shows a secondary school timetable, extracted from MUSAC's Timetable Assistant module.

Aitken Alan	Monday	Tuesday	Wednesday	Thursday	Friday
Period 1			10DY SST 6	10BA SST 6	9BH SST 6
Period 2	A 11GEO 6	10DY SST 6	9BH SST 6	C 11GEO 28	9AN SST 6
Period 3	9AN SST 6	C 11GEO C3	10BA SST 6		A 11GEO 6
Period 4	9BH SST 6	A 11GEO 6	C 11GEO C3	10DY SST 6	
Period 5		9AN SST 6	A 11GEO 6	9BH SST 6	C 11GEO C3

Illustration 23 : A staff member's timetable

Initially, however, you may not have a current timetable selected. If not, click on the 'Select timetable' button for the following dialogue.

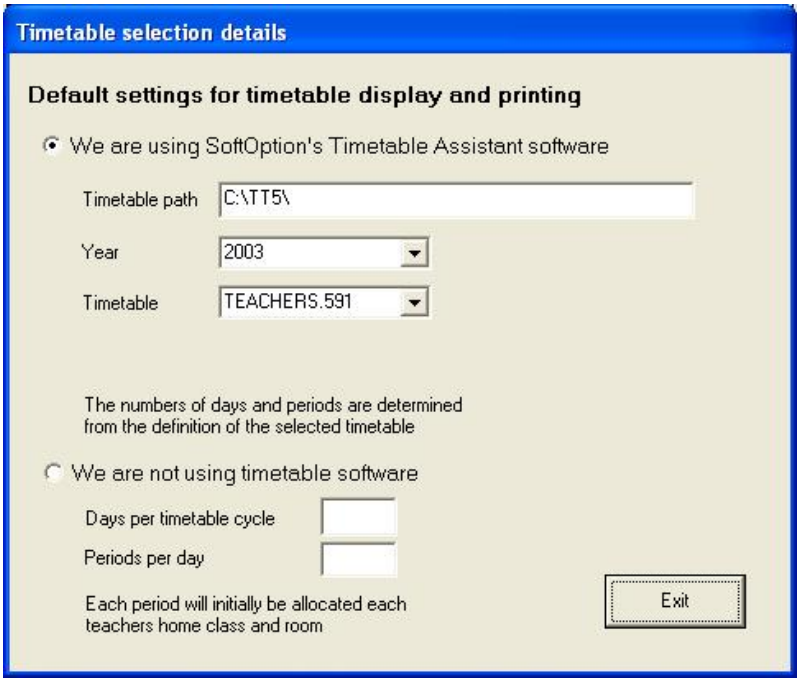


Illustration 24 : Identifying the current timetable

In the top half of the screen you can identify the TTSM directory which holds your Timetable Assistant module, the relevant year, and the timetable number which you are currently using. Click 'Exit' to return to the main screen, where the teacher's timetable will be displayed.

Alternatively, you could elect to fill in the bottom half of the Timetable link screen.

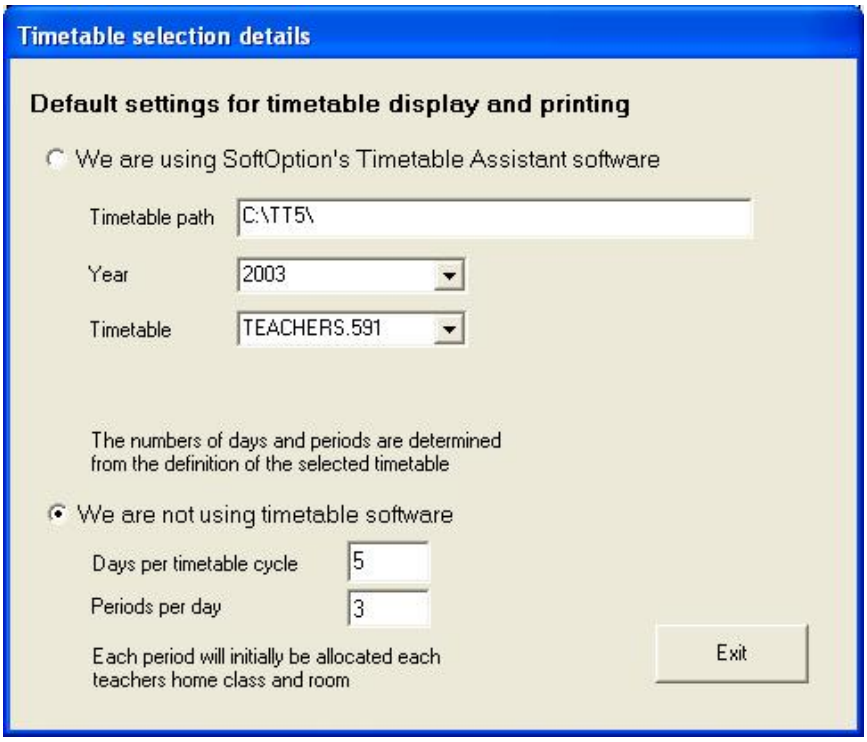


Illustration 25 : A primary school scenario

The above illustration is for a primary school operating a five-day week with three 'periods' per day. Subdividing the day into 'periods' is useful if a reliever is used for only part of a day. On clicking 'Exit' you will be asked:

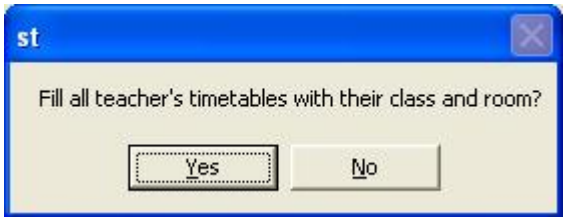


Illustration 26 : Fill in the timetables automatically?

If you agree to this, each teacher's 'Class' and 'Room' will be filled in, in each cell of their timetable.

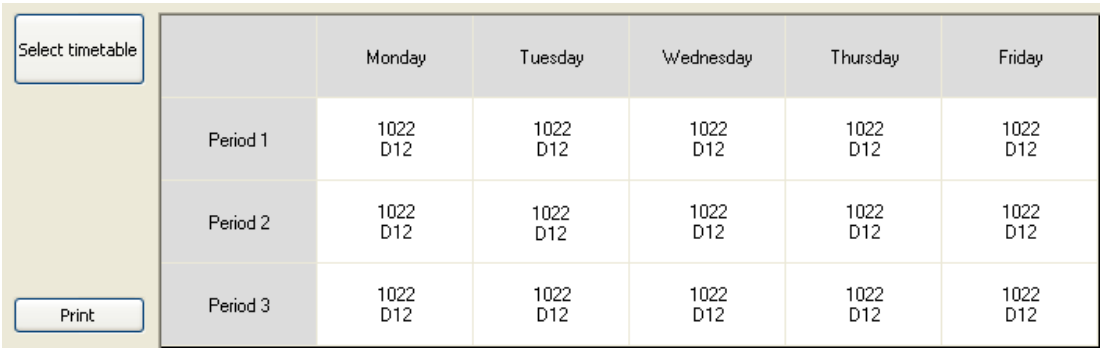


Illustration 27 : A primary school timetable

On the left are duplicated the 'Class' and 'Room' data fields and changing either or both of these will cause the timetable to reflect the changes.
You can also click in each cell of the timetable and adjust the individual contents to allow for particular changes from the norm, as shown below. Click 'Save' and just the selected cell will be updated with the new entries.

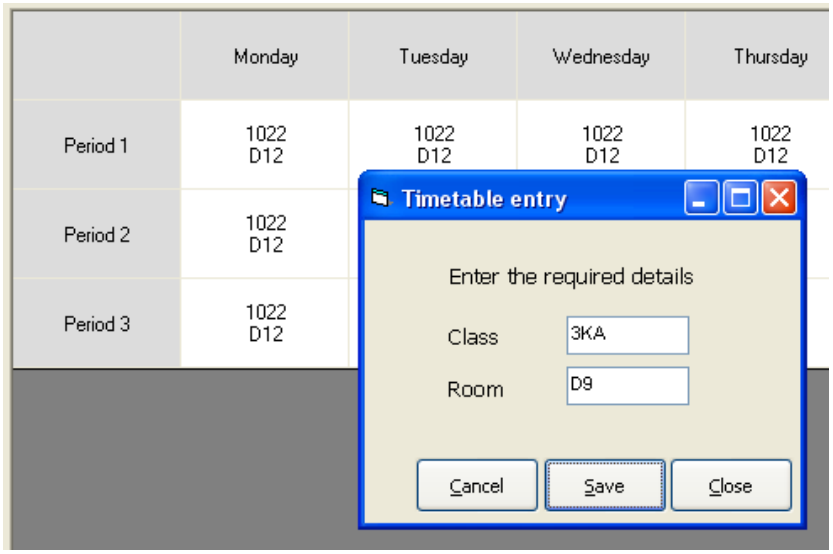


Illustration 28 : Adjusting a timetable entry

Thus it is possible for primary schools to specify each teacher's timetable and to have these serve as the basis of 'daily reliefs'.

6.1.9 *Leave*

This tab allows you to keep track of three types of leave, annual leave, sick leave and discretionary leave. For some staff members, including teachers, the ‘Annual leave’ tab will not be visible, as annual leave is not relevant to these members of staff.

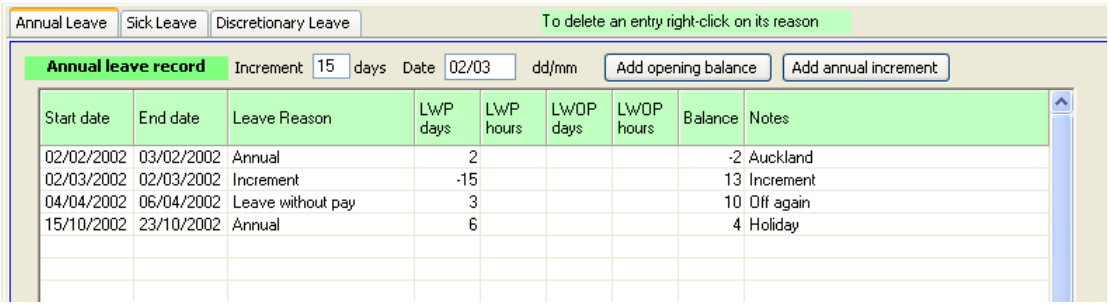


Illustration 29 : The ‘Annual leave’ screen

The 'Annual leave' tab appears below, where you can enter the relevant details, LWP (Leave with pay) or LWOP. This information is summarised weekly and can be emailed directly to the payment authority.

The 'Sick Leave' tab is similar except for the extra column where you can signal you have sighted a medical certificate when necessary.

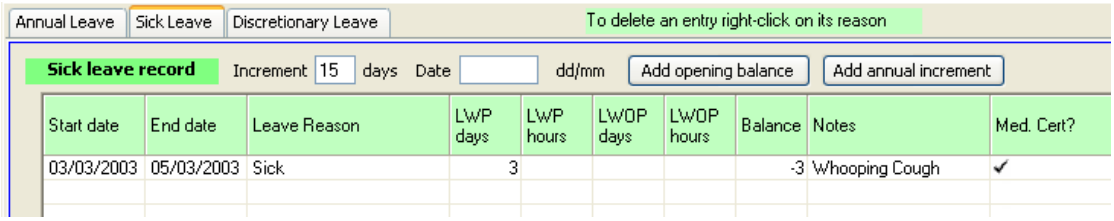


Illustration 30 : The ‘Sick leave’ screen

The 'Discretionary Leave' tab is the same as the 'Annual leave' tab and is used to record such leave as bereavement, maternity leave etc which does not affect the annual leave entitlement.

In all three cases, the leave categories offered are those specified by Pay Serve and include the full range of possibilities. You can adjust this list via ‘Configuration’.

6.1.10 *Review/Appraisal*

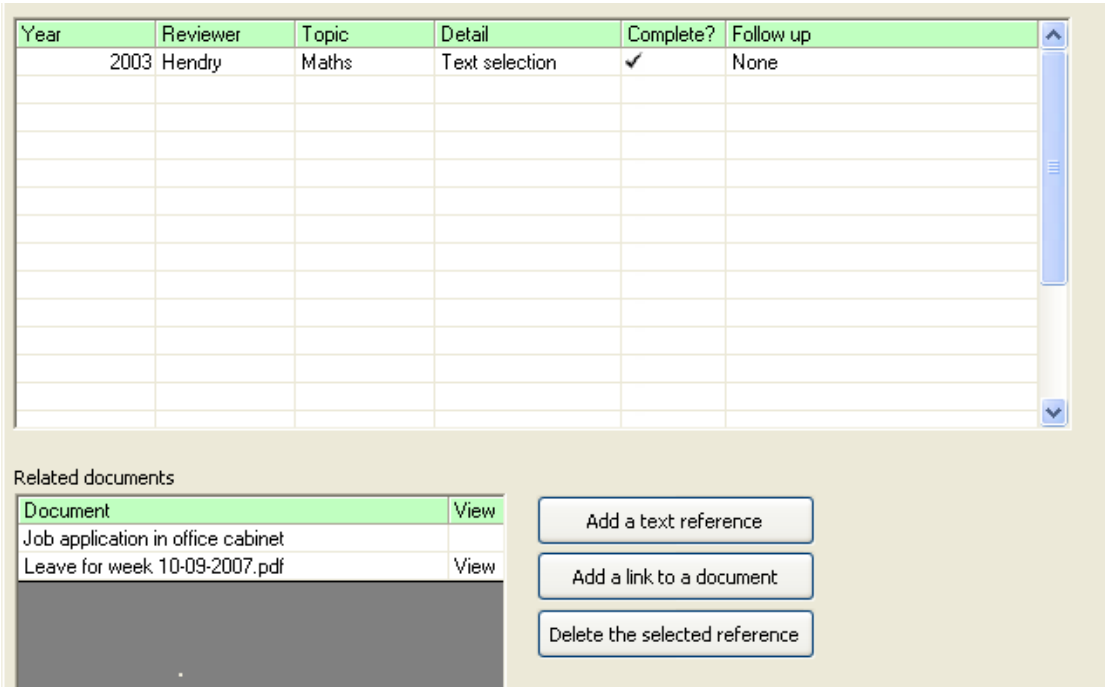
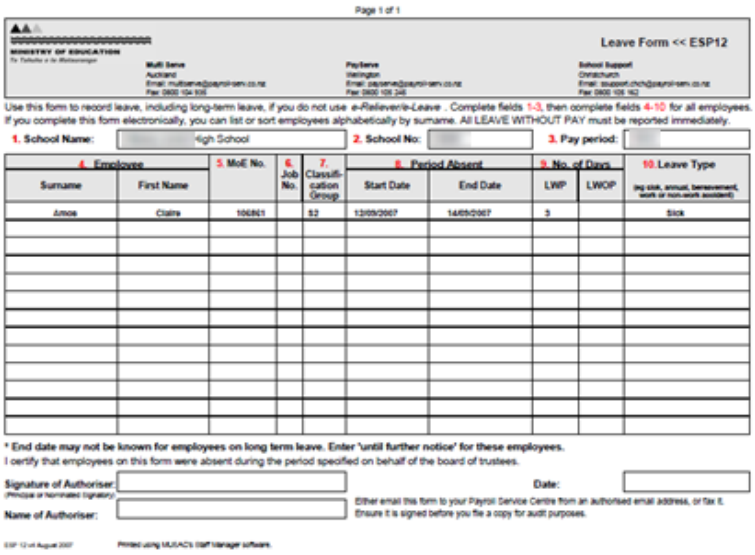


Illustration 31 : The appraisal screen

On first entry (each time) a yellow message appears in the centre of the table. This is to remind you that each designation ('Teacher', 'Reliever' etc) can have their own set of headings for the review/appraisal table. These are set via the 'Configuration' button at the top of the screen. For further details, see the relevant chapter.
Click on the yellow message and it will disappear leaving you free to enter required action.

At the bottom of the screen you can record information relating to documents concerning the staff member. The entries may be text entries (eg. the first above) or links to on-line documents (the second above). In the latter case you can then view the document directly by clicking on the 'View' label alongside the reference. In this case, their leave record appears, as shown below.


Page 1 of 1

MINISTRY OF EDUCATION

Leave Form << ESP12

Use this form to record leave, including long-term leave, if you do not use *e-Reliever/e-Leave* . Complete fields 1-3, then complete fields 4-10 for all employees.
If you complete this form electronically, you can list or sort employees alphabetically by surname. All LEAVE WITHOUT PAY must be reported immediately.

1. School Name: High School 2. School No: 3. Pay period:

4. Employee		5. MoE No.	6. Job No.	7. Classification Group	8. Period Absent		9. No. of Days		10. Leave Type
Surname	First Name				Start Date	End Date	LWP	LWOP	(eg sick, annual, bereavement, work or non-work accident)
Amos	Claire	106861		52	12/09/2007	14/09/2007	3		Sick

* End date may not be known for employees on long term leave. Enter 'until further notice' for these employees.
I certify that employees on this form were absent during the period specified on behalf of the board of trustees.

Signature of Authoriser: (Principal or nominated signatory) Date:

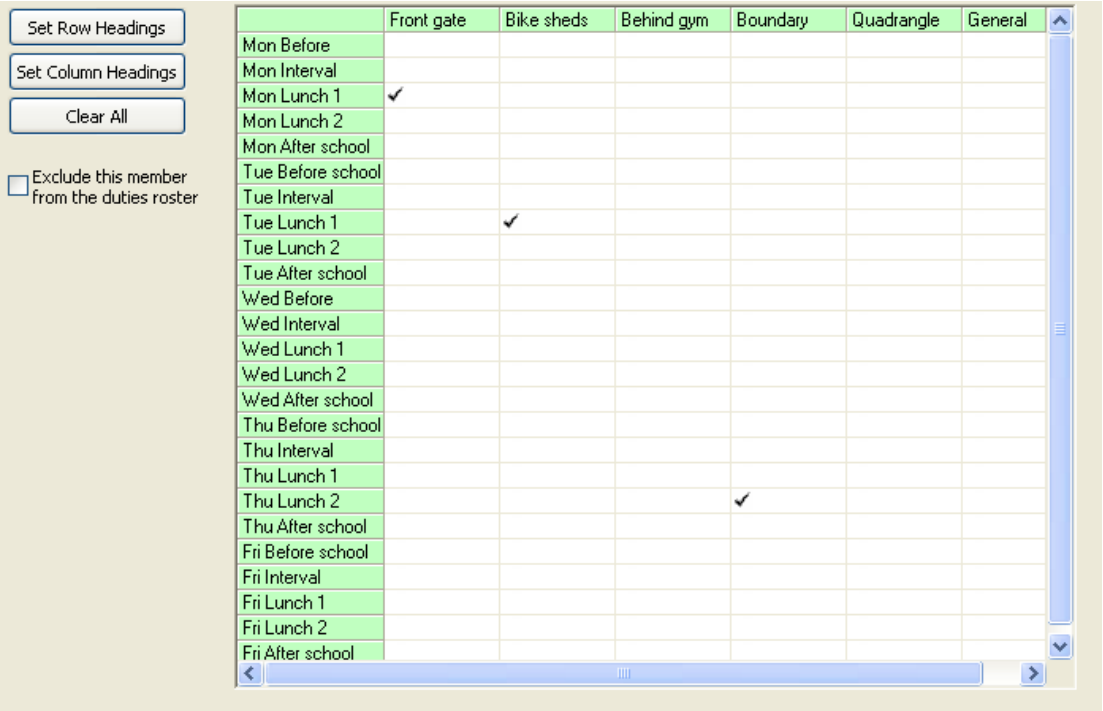
Name of Authoriser:

Either email this form to your Payroll Service Centre from an authorised email address, or fax it. Ensure it is signed before you file a copy for audit purposes.

ESP 12 v4 August 2007 Printed using MUSAC's Staff Manager software.

6.1.11 *Duties*

This screen allows you to view or adjust the current staff member's duty roster. There is a Duty Roster utility where adjustments would be made via that process, where all duties for all staff members are displayed.



	Front gate	Bike sheds	Behind gym	Boundary	Quadrangle	General
Mon Before						
Mon Interval						
Mon Lunch 1	✓					
Mon Lunch 2						
Mon After school						
Tue Before school						
Tue Interval						
Tue Lunch 1		✓				
Tue Lunch 2						
Tue After school						
Wed Before						
Wed Interval						
Wed Lunch 1						
Wed Lunch 2						
Wed After school						
Thu Before school						
Thu Interval						
Thu Lunch 1						
Thu Lunch 2				✓		
Thu After school						
Fri Before school						
Fri Interval						
Fri Lunch 1						
Fri Lunch 2						
Fri After school						

Illustration 32 : The individual's duties

You can set the row headings (ie. the various duty time slots) via the top button on the left.

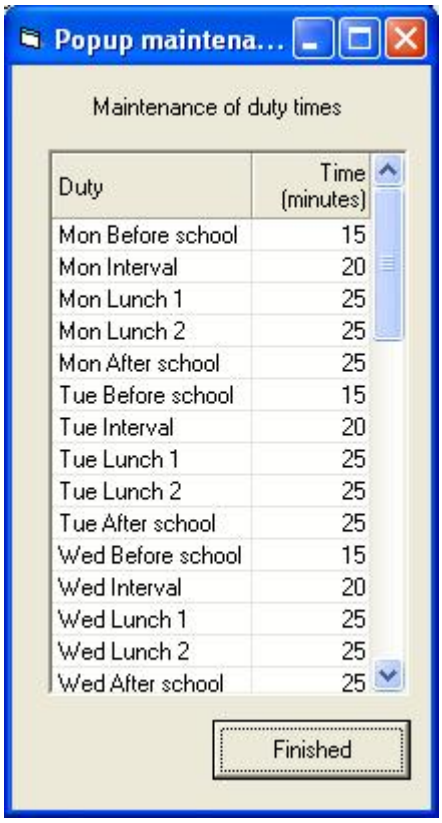


Illustration 33 : Setting duty time slots

Each time slot has a number of minutes associated with it and these are used to calculate each teacher's total duty time - as used in the Duty Roster tool under 'Utilities'.
The column headings - the duty areas - may be adjusted similarly via the second button.
To adjust duties click in the relevant cell to have the tick either appear or disappear.
Duty rosters may be printed via the Printing utility.

6.1.12 *Qualifications*

This screen has two tabs. 'Qualifications', allows you to record the member's qualification, both formal and informal.

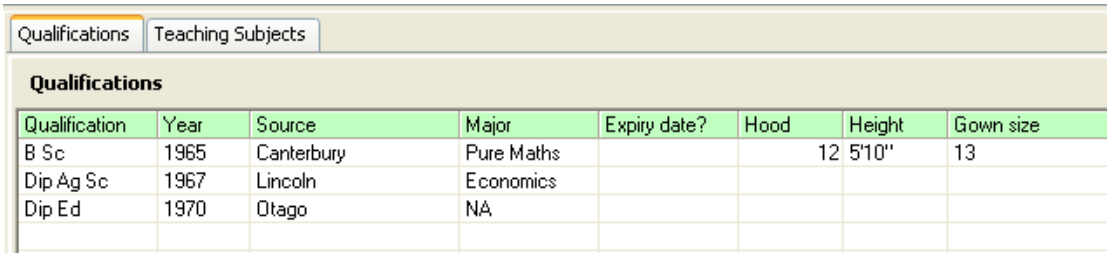
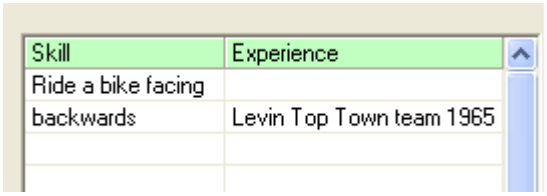


Illustration 34 : The qualifications screen

Informal skills :



The 'Teaching subjects' tab provides the ability to record that, along with information concerning the teacher's ability in various languages and their wishes – presumably relating to their teaching career.

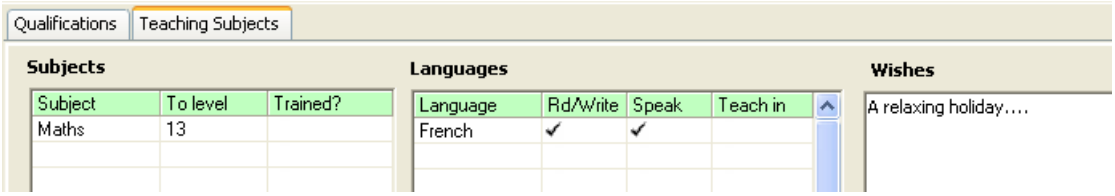


Illustration 35 : Subjects, languages and wishes

6.1.13 *Keys, Passwords, Building access and Laptop details*

See below, you can record which keys are held by each member of staff, passwords they are privy to, buildings to which they have access and details relating to their laptop(s). One school had a staff member disappear overseas along with several important passwords to file servers etc and felt it would be useful to record them, filter them and to print them.

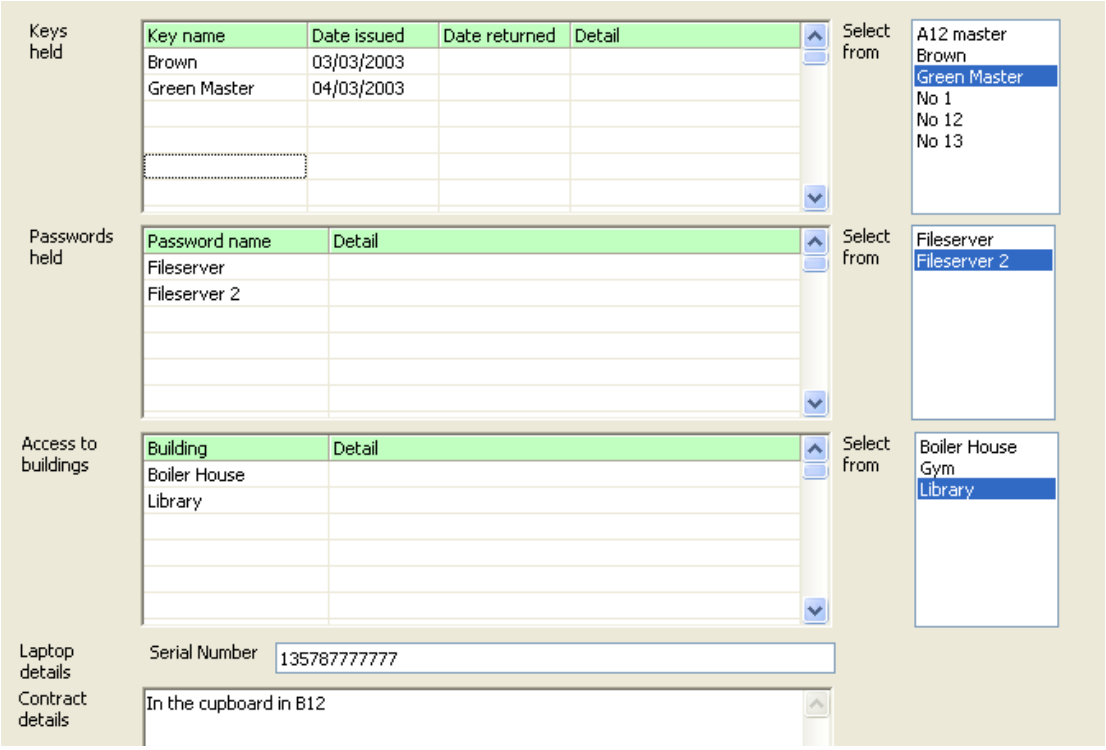
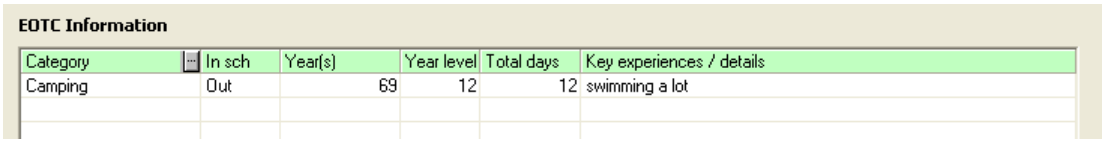


Illustration 36 : Keys and passwords

You are NOT obliged to record the actual passwords themselves here, unless you wish to do so. The fact that a particular password is known by a particular member of staff is generally sufficient.

6.1.14 *EOTC*

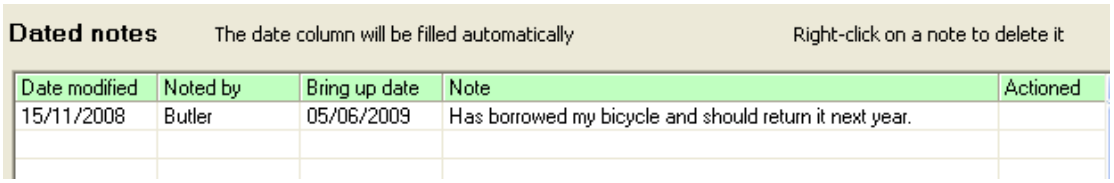
Education Outside the Classroom. This screen enables you to record details relating to the staff member's EOTC involvement.



Notice the small '3 dots' button which allows you to adjust the list of categories from which you can choose.

6.1.15 *Notes*

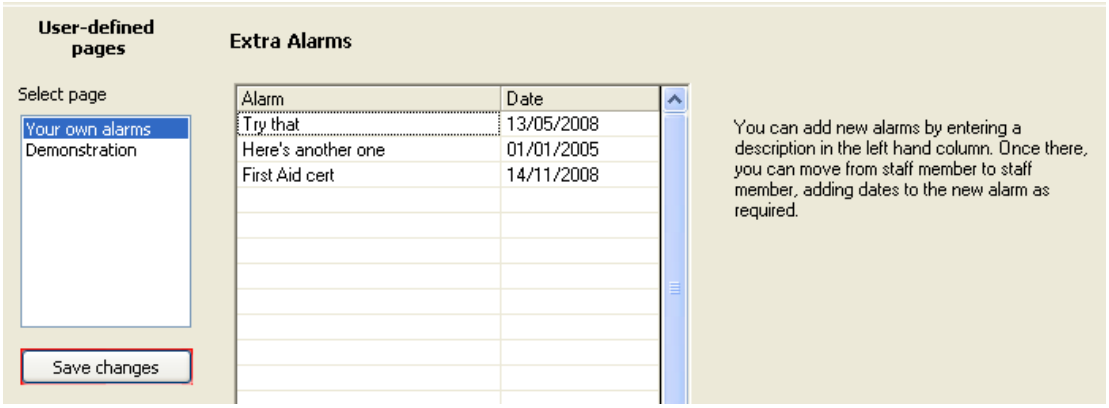
As can be seen in the illustration below, you can record notes relating to the staff member. If you include a 'Bring up date' then this will be checked via the Alarms process – of which more later.



6.1.16 *User defined pages and alarms*

The final tab offers access to any user-defined pages which have been set up via 'Visible sections' under 'Configuration' – and data entered for the staff member displayed.
Note: Each of these screen has its OWN 'Save changes' button.
'Your own alarms' will bring the following screen.

In the left column you can enter a description of a particular alarm. This will automatically be saved and will subsequently appear for each and every staff member. In the right hand column you enter the date of the alarm which applies to the currently displayed staff member. As you move from staff member to staff member the entries in the left column will stay the same and those in the right column will alter to display those entered, if any, for the currently displayed staff member.


User-defined pages
Extra Alarms
Select page
Your own alarms
Demonstration
Save changes
Alarm
Date
Try that
13/05/2008
Here's another one
01/01/2005
First Aid cert
14/11/2008
You can add new alarms by entering a description in the left hand column. Once there, you can move from staff member to staff member, adding dates to the new alarm as required.

7 Apply Filter

7.1.1 *Overview of filtering*

The purpose of filtering is to allow you to access just a selected group of staff members. The filtering process is accessed via the second large button at the top of the main screen, shown above.

Across the top of the filter screen, which is shown below, are eight tabs, accessing a different area which can be filtered. You can combine requests from several areas. The illustration below is of the first area - Basic details.

Filters can be compound; ie, you can build a filter from several criteria across several of the filter screens. The logic between screens is 'AND' – eg. select members who are Teacher Aides (from Basic details) and who started teaching before 01/01/90 (from Dates).

The logic within a screen is 'OR' – eg. select those who are Teacher Aides OR Ancillary staff.

7.1.2 *The filtering process*

1 Basic details

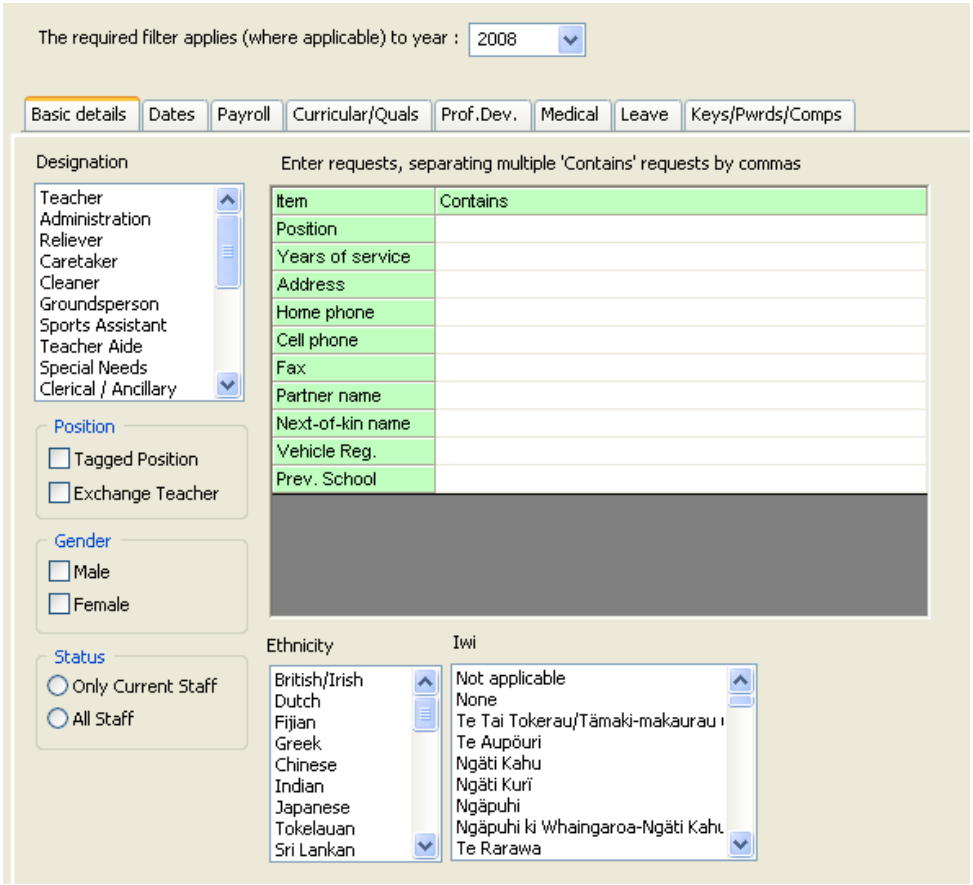


Illustration 1 : Basic filters

You can select one or more designations, along with various possibilities in the listed areas. Click 'Relievers' in the designation area. Once you have made your selection, move to the right of the screen and click 'Apply filter'. See below the 'Male' option has also been ticked so that, when 'Apply filter' is clicked a list of the Male Relievers is displayed on the right of the screen.

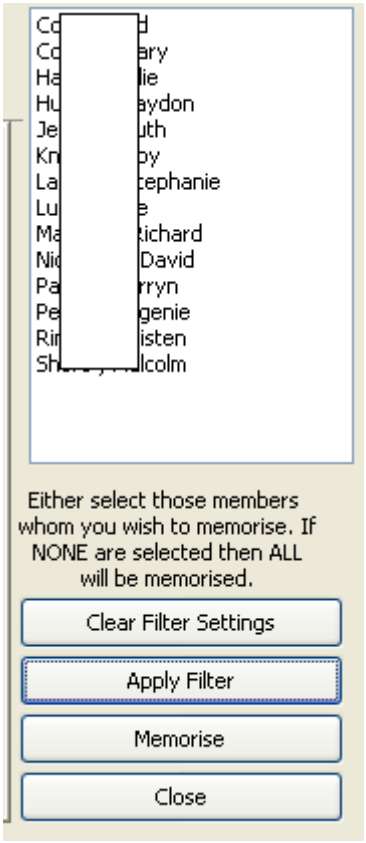


Illustration 2 : Applying a filter

Those staff members matching your filter request will be listed in the small list window on the right side of the screen.

If you wish to 'jump' straight to one of those listed then simply double click on their name and you will arrive in the data screen area for that staff member.
However, if you elect to 'memorise' those listed then a message will appear, suggesting that you double click on one of them. This takes you to that member's data screen. Now, though, there will be a red box around the bottom right hand corner buttons.

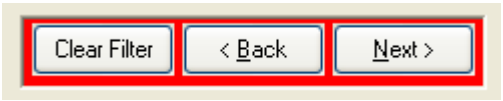


Illustration 3 : The navigation buttons when a filter has been applied

The Back and Next buttons now move you backwards and forward through just the memorised staff members. The new 'Clear filter' button can be clicked at any stage to return you to the full list of staff members. Pressing Alt-S or Add new, of Search etc.... any of these buttons will also return you to the full list of members.

The other filter possibilities are :

2 Important dates

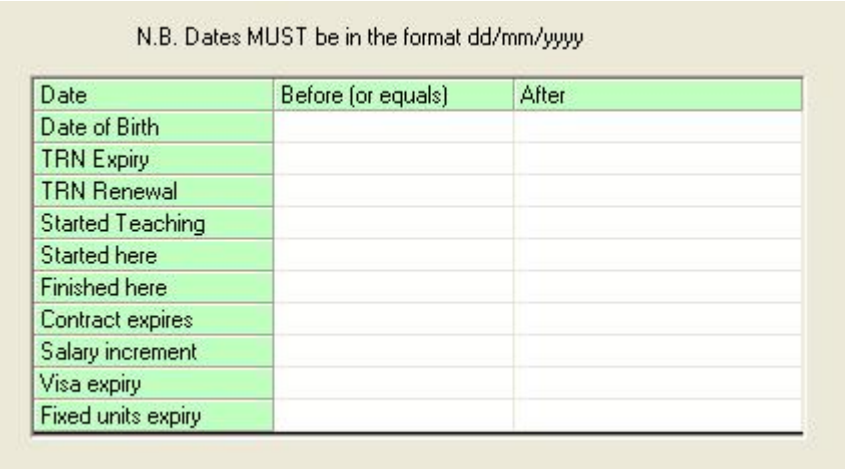


Illustration 4 : Date filters

Enter a date in either column and it will form the basis, at least in part, of the filter.

3 Payroll information

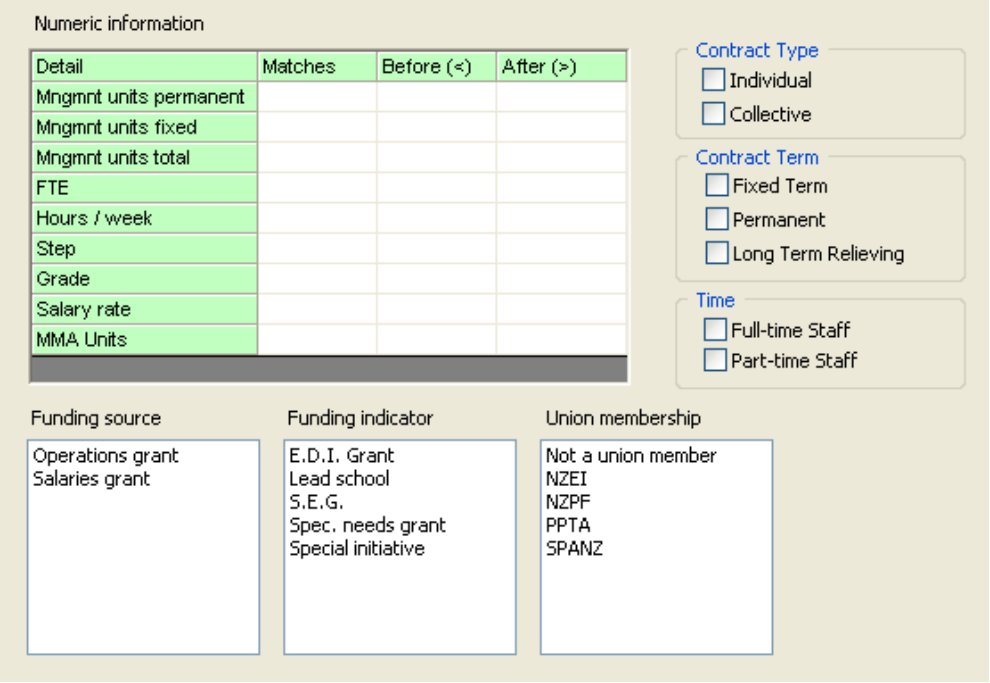


Illustration 5 : Filters associated with payroll details

In the Numeric information grid at the top left of the screen you can enter a number in a column to have a filter based on that combination. eg. FTE < 1, Salary rate > 50000 etc.

4 Curricular / extra-curricular information

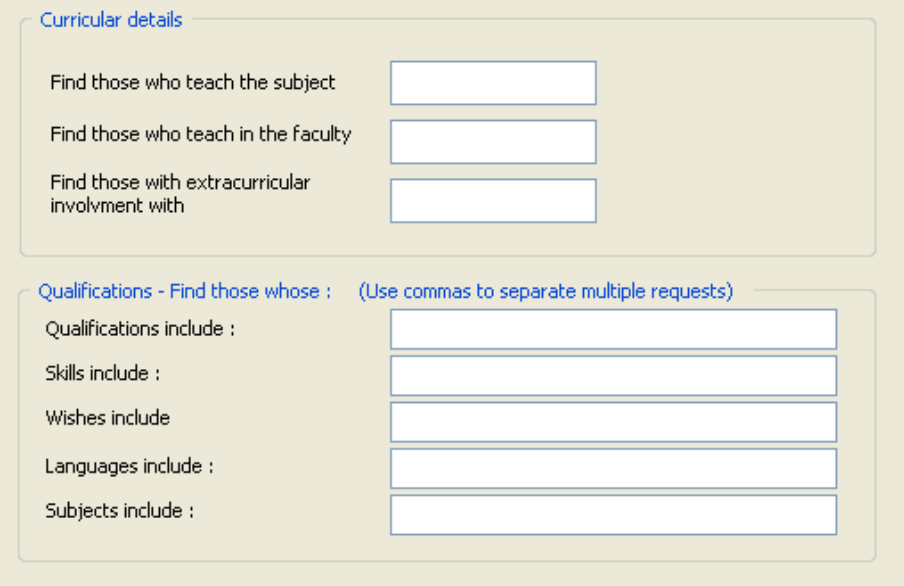


Illustration 6 : Curricular and extra-curricular filters

Enter the requests in the relevant places to generate a filter. For example Languages include French and Subjects include Japanese.

5 Professional development information

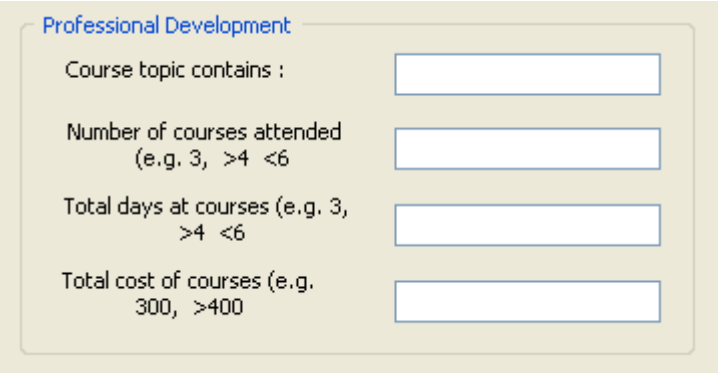


Illustration 7 : Professional development filters
Enter your specifications in the places provided.

6 Medical information

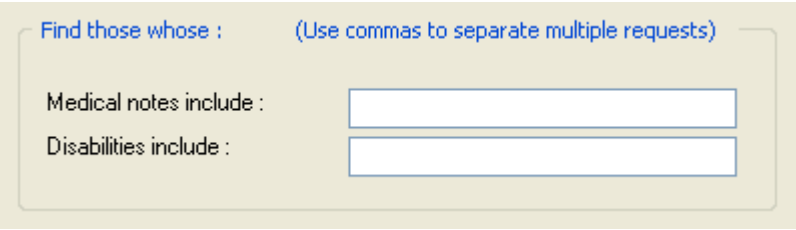


Illustration 8 : Medical filters

7 Leave information

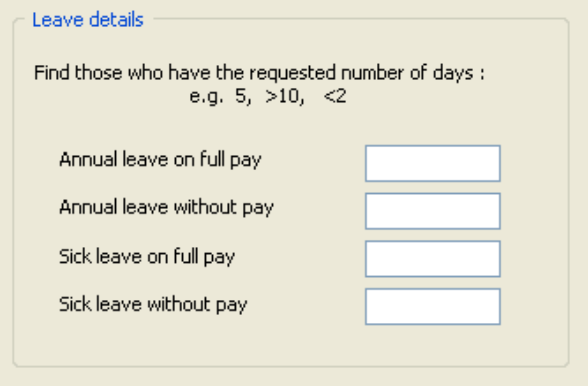


Illustration 9 : Leave filters

8 Those with particular keys or passwords

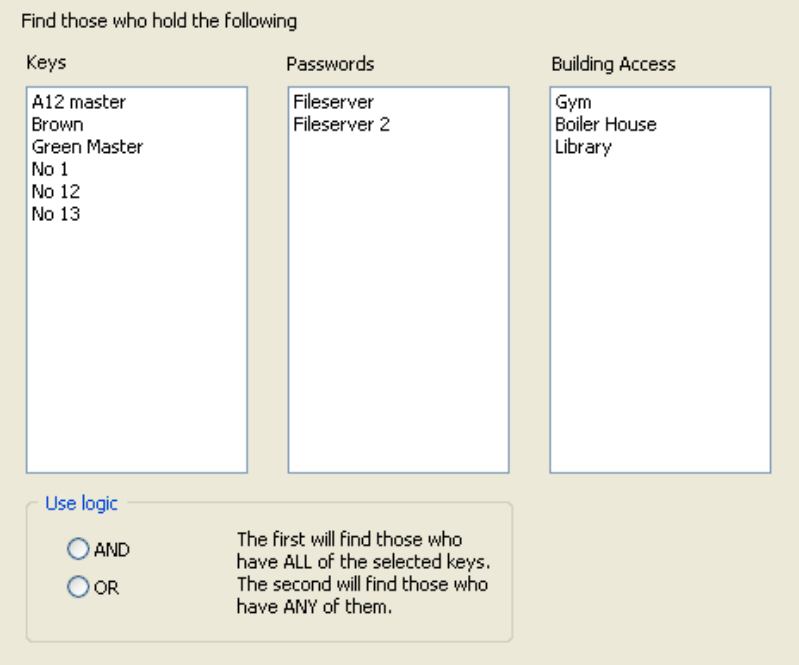


Illustration 10 : Keys and passwords

8 Printing Lists

8.1.1 *Overview of printing*

As well as the pre-designed lists and tables you can also design your own. These are accessed via 'Print lists' at the top of the main screen.

8.1.2 *Printing lists*

The 'Pre-designed lists' button reveals the following screen which offers a variety of pre-designed lists.

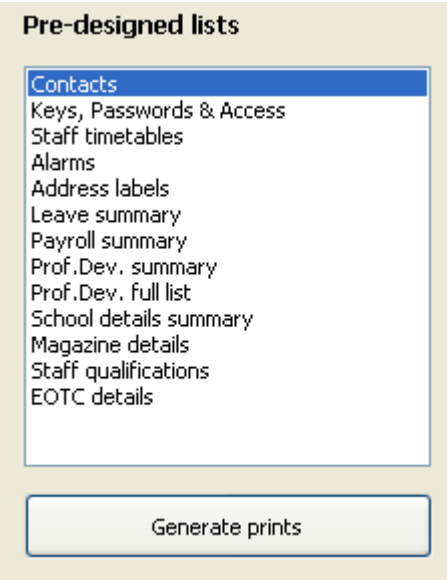


Illustration 1 : The pre-designed lists

Above is on the left side and, when a particular selection is chosen, its alternatives are displayed on the right side of the screen eg. the 'Contacts' possibilities.

In all cases, lists and documents are previewed to the screen before being (optionally) sent to the printer.

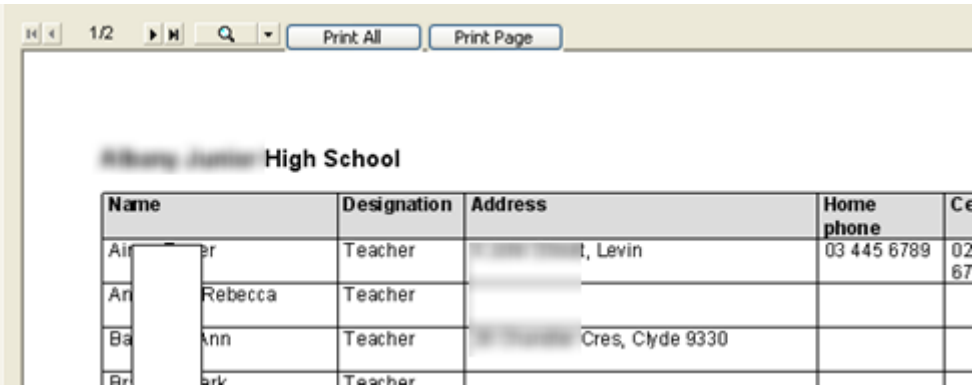


Illustration 1 : The list preview screen buttons

At the top of the preview screen, shown above, are several buttons.

1 The first four allow you to move backwards and forwards through the pages of the list. In the example above, these are deactivated, as the list has only one page. The '1/2' tells you that this is Page1 of 2 pages in length.

2 The magnifying glass button allows you to zoom in on the list for a closer view, you can also double-click on the document. You can repeatedly left-double-click to enlarge the document and right-double-click to reduce it again. If the document is too large to be viewed in its entirety, you can use the mouse to drag it around within the viewing window.

3 The 'Print all' button prints all pages of the document, and 'Print Page' will print just the currently viewed page.

When you select Contacts, where you can select one or more designations and members of the selected designations only will be included in the resulting list. You can apply a more complex filter using the filter button, see 'Address labels'.

Also choose from the alternative options to print landscape.

Once you have made your choices, click on 'Generate prints' and your list(s) will be displayed on the right of the screen, see below.

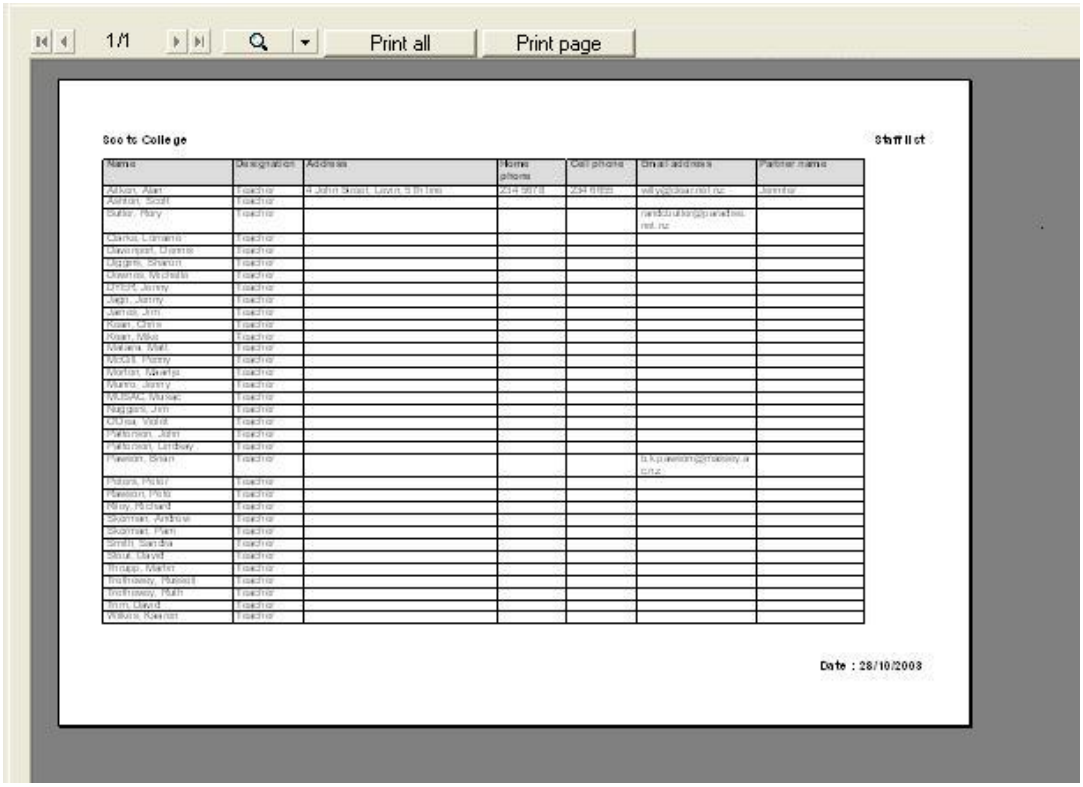


Illustration 3 : A previewed list – not enlarged

This is the standard preview screen which is used to offer you the chance to view all lists and documents before proceeding to print.

3 **Keys and passwords** - this list has two formats available

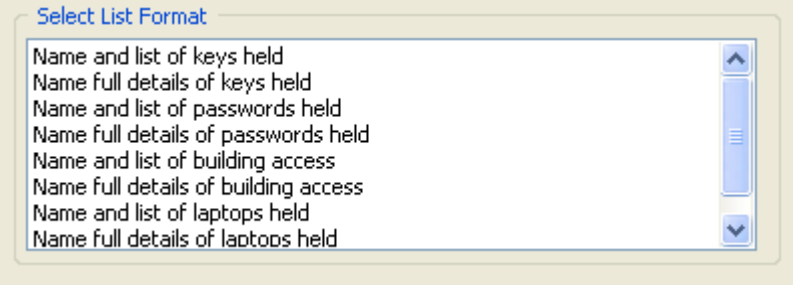


Illustration 4 : Key and passwords formats

Timetables - The options frame offers you the way to connect up to a MUSAC Timetable Assistant timetable and you also have two cell formats available as well as being able to print in a variety of formats, including Landscape.

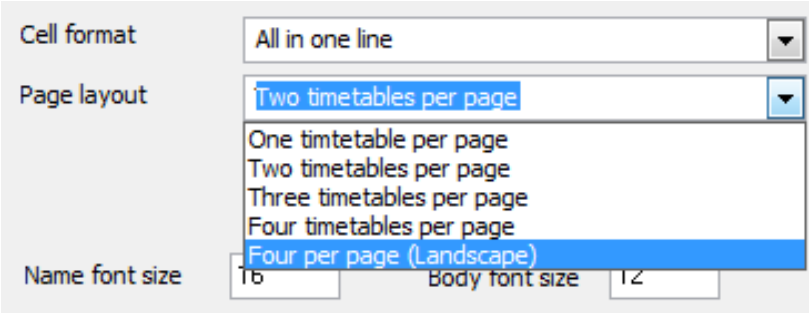


Illustration 5 : Timetable printing options

An example of a simple timetable printout is shown below.

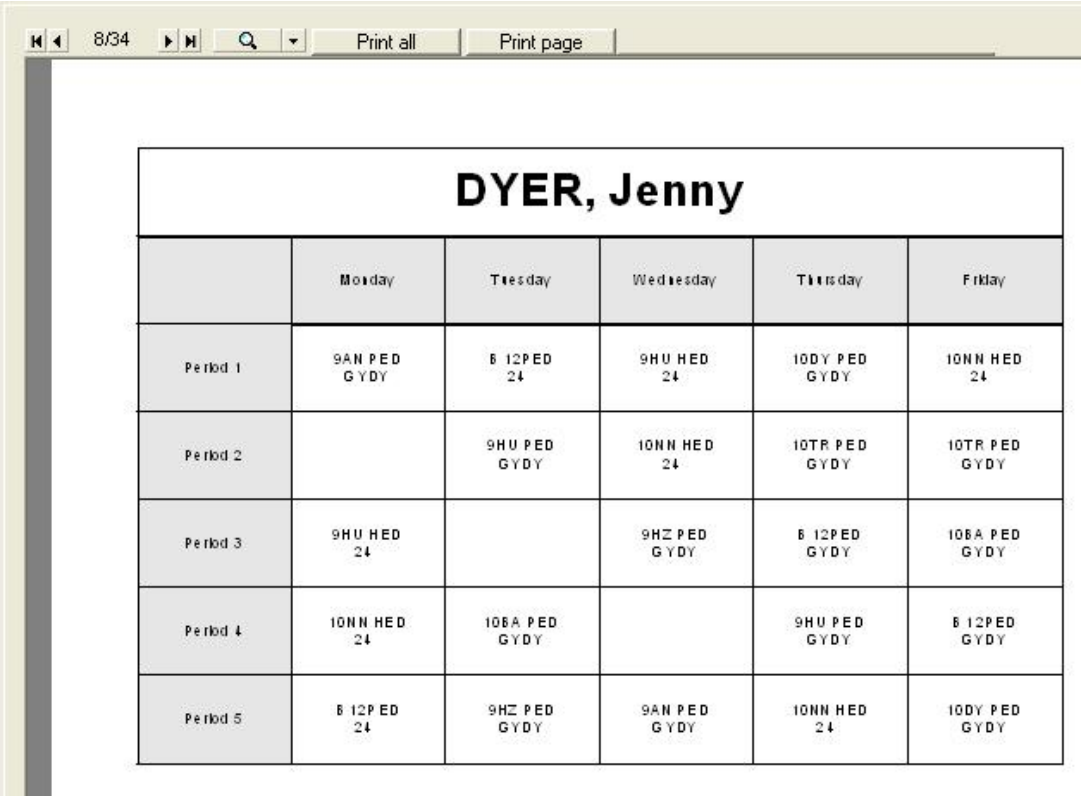


Illustration 6 : An example timetable

5 **Alarms** - this list has three formats available

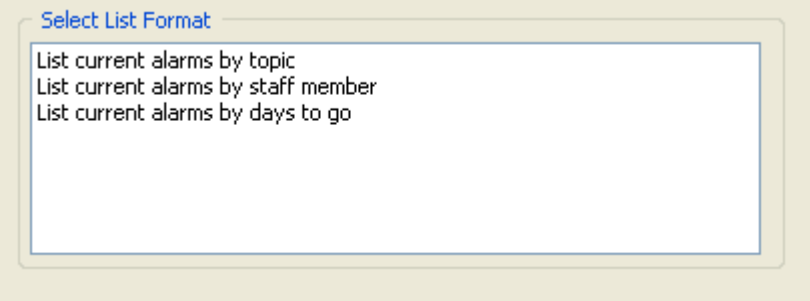


Illustration 7 : Alarm list possibilities

6 Address labels

This illustration shows three possible filters. The first is the 'designations' filter (include all staff members)

If you have visited the 'Filter' process (Button two at the top of the main screen) and have memorised a more complex filter, this will be offered (for all list printing) as a second alternative. (Include just currently filtered staff members)

In the case of address Labels there is the possibility (see Personal Data) each member could have a contact made by either 'Post' or 'Email'. The third option here is to print labels if you have the 'Post' option checked.

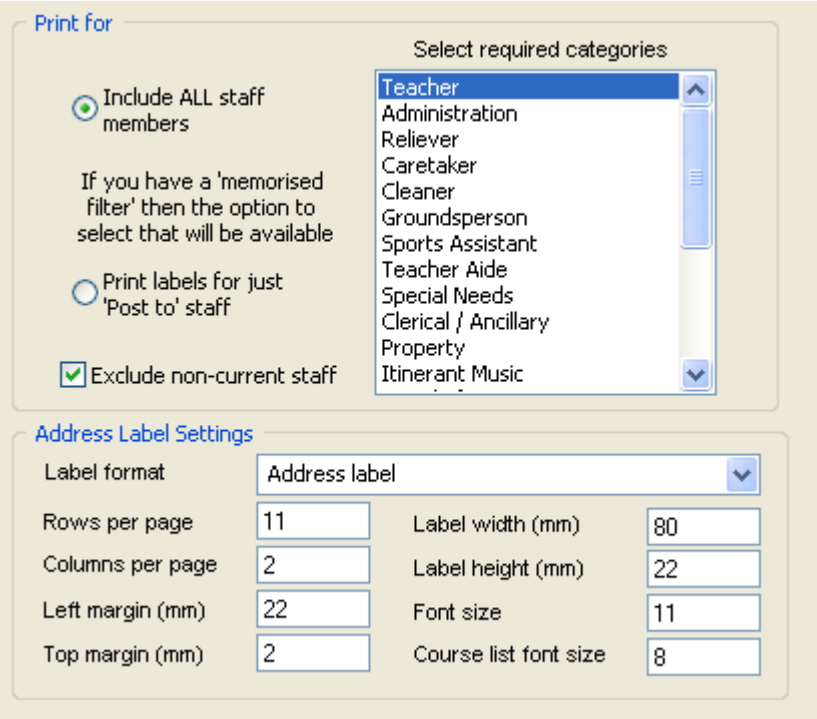


Illustration 8 : Printing and formatting address labels

At the bottom of the screen are the settings for your address labels. Default settings are displayed above, adjust them to match the sheets of labels onto which you are printing. Print a page on ordinary paper as you experiment with the settings to ensure that the output does line up with your labels. The height and width settings do not correspond exactly to label sizes on some printers. Where the label might be 100 x 37 mm you might

have to use settings of 84 mm and 33 mm respectively to achieve the best printouts. The settings will be remembered and returned for you next time you print labels.
At the top of the label settings is a pull-down menu offering a variety of label formats, so you can use this to print not just address labels, but also folder labels and others.

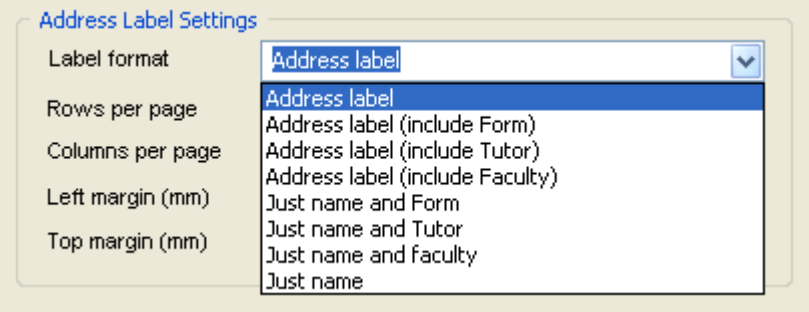


Illustration 9 : Label format options

7 **Leave lists** - this list has five formats available

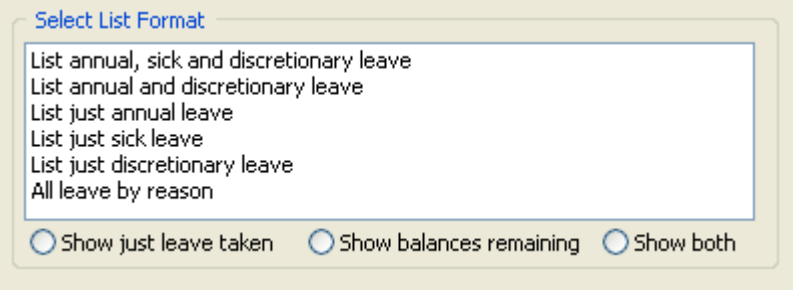


Illustration 10 : Leave list possibilities

8 **Payroll summary** - this list has two formats available.

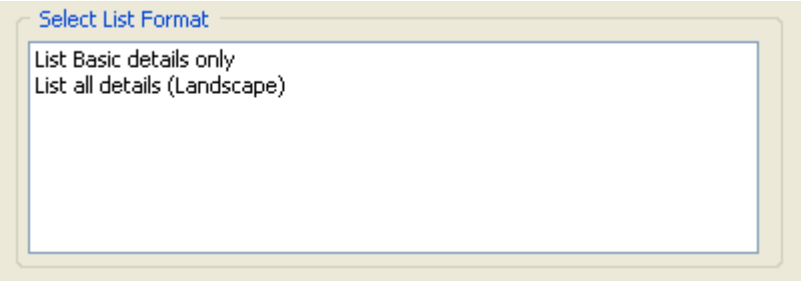


Illustration 11 : Payroll summaries

9 Professional development - has two formats.

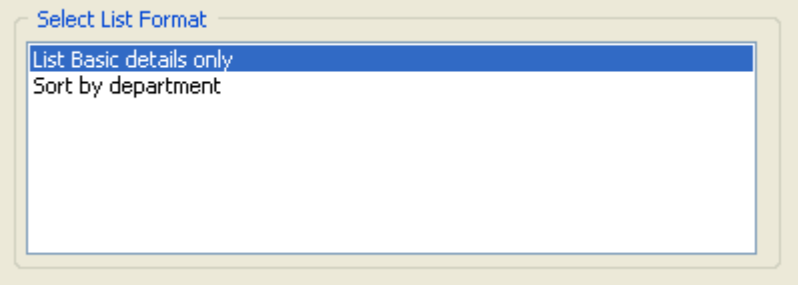


Illustration 12 : The professional development formats

10 **Prof. Dev. – full list** - has no formats to select as there is only one.

11 **School details summary** - has one format to select.

12 **Magazine list** - this list has three formats available.

There are two further options allowing you to print the list to a file, ready for importing into your school magazine document.

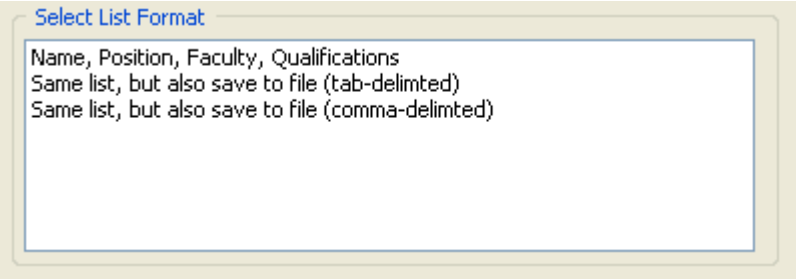


Illustration 13 : The 'Magazine list' formats

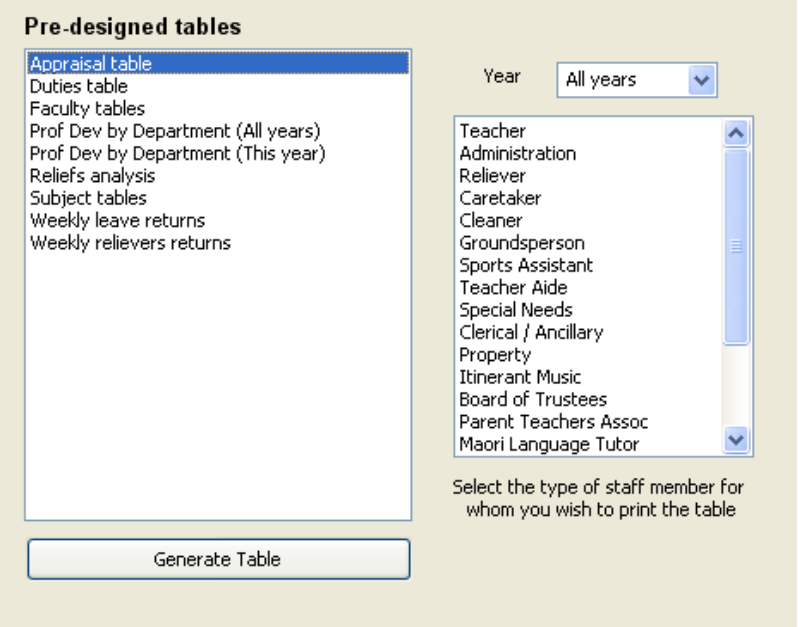
13 **Staff Qualifications** - has no formats to select as there is only one.
14 **EOTC Details** - has no formats to select as there is only one.

8.1.3 *Printing tables*

Click on 'Pre-designed tables' for the possibilities available.

Illustration 14 : Pre-designed tables

1 Appraisal Table



Select the type of staff to be included from the list on the right, click 'Generate Table'. A table of the selected members with their appraisal information will be produced.

2 The Duties Table

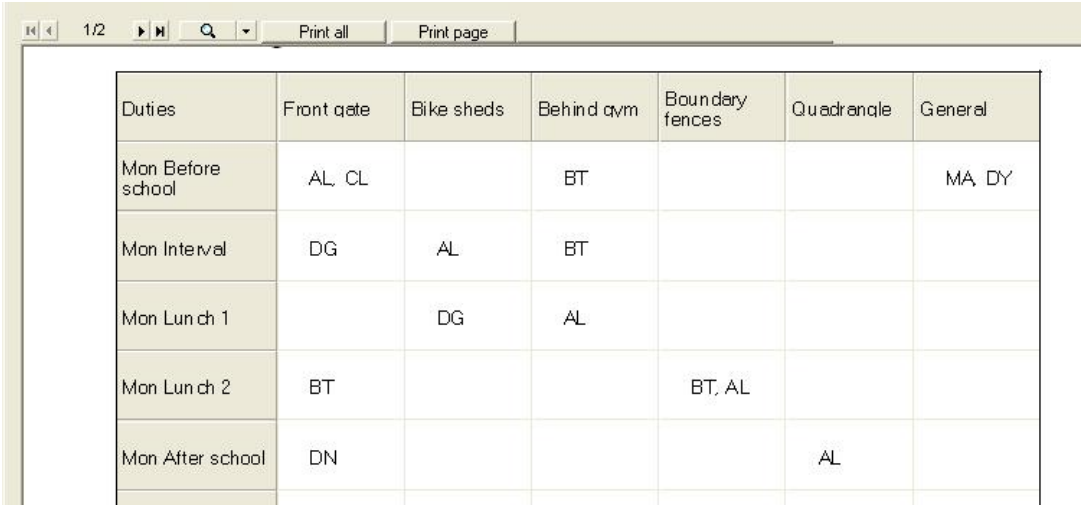


Illustration 15 : The duties table

This generates a full duty roster of all duty time slots and areas, a small excerpt of which is shown above.

3 Faculty tables

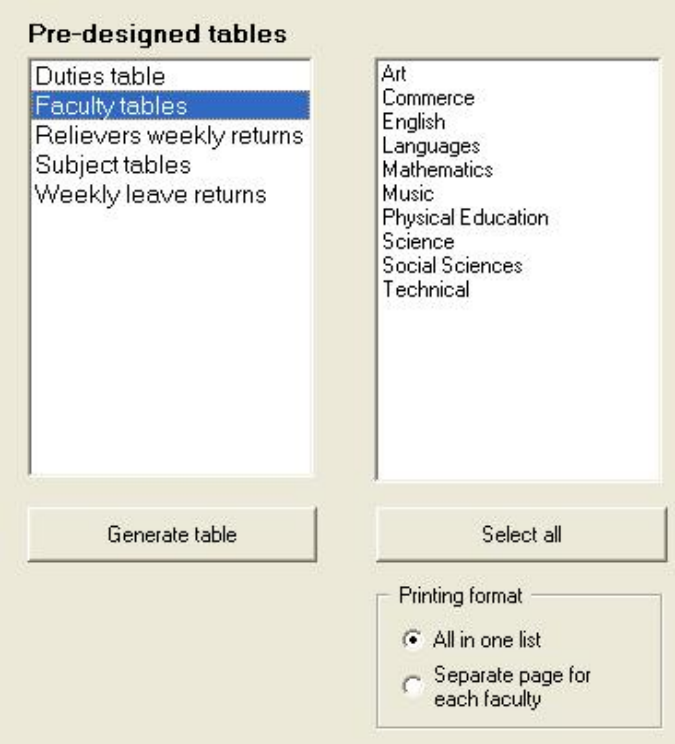


Illustration 16 : Faculty table options

On each member's Curricular Responsibilities page, their various faculty memberships are recorded. These are used in this table printing routine to generate faculty lists which include the number of hours of each subject taught at each level. An extract from an example table is shown below.

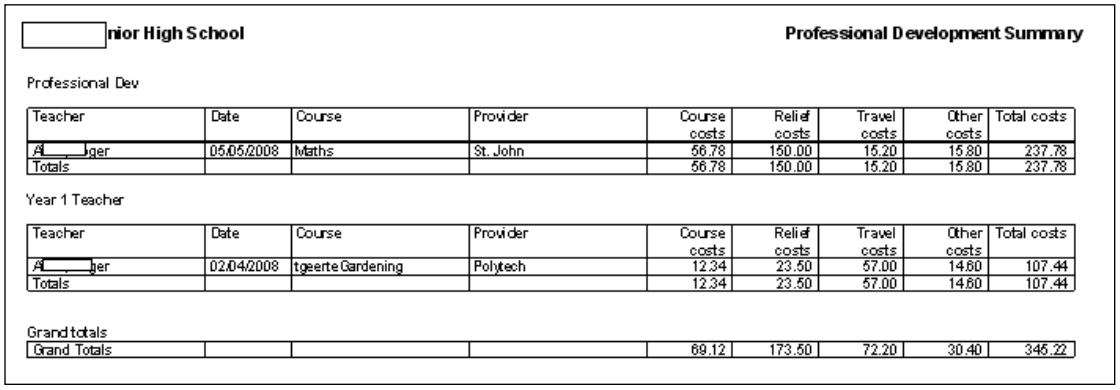
Faculty : Mathematics

Teacher	Subject	Level	Hours
Aitken, Alan	Computing	11	8
	Mathematics	9	8
	Mathematics	10	4
	Mathematics	11	8
	Mathematics	12	4
Butler, Rory	Applied Maths	13	4
	Mathematics	9	8
	Mathematics	10	4
	Mathematics	11	4.5
	Mathematics	12	8

Illustration 17 : A Faculty table

4 Professional Development by Department (all years)

These are very similar to the faculty tables above. A very reduced sample is shown below.



[ ]nior High School — Professional Development Summary

Professional Dev

Teacher	Date	Course	Provider	Course costs	Relief costs	Travel costs	Other costs	Total costs
A[ ]ger	05/05/2008	Maths	St. John	56.78	150.00	15.20	15.80	237.78
Totals				56.78	150.00	15.20	15.80	237.78

Year 1 Teacher

Teacher	Date	Course	Provider	Course costs	Relief costs	Travel costs	Other costs	Total costs
A[ ]ger	02/04/2008	tgeerte Gardening	Polytech	12.34	23.50	57.00	14.60	107.44
Totals				12.34	23.50	57.00	14.60	107.44

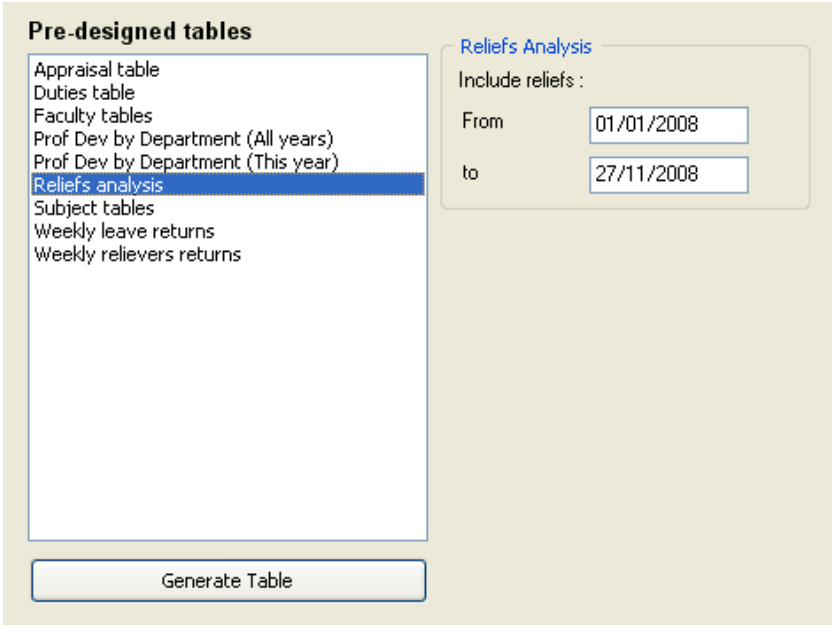
Grand totals

Grand Totals				69.12	173.50	72.20	30.40	345.22

5 Professional Development by Department (This year)

These are very similar to the previous example, apart from the obvious difference – that only entries relating to the current year are displayed.

6 Reliefs Analysis



Specify the two dates required and a table such as that shown below (hopefully with more details) will be produced.

Analysis of reliefs by reason between 01/01/2008 and 27/11/2008

Reason	No. of reliefs	Total time	No. of reliefs	Total time	Total reliefs	Total time
	by relievers	by relievers	by staff	by staff		
Unknown	77	77.08 hrs	1	1.00 hrs	78	78.08 hrs
Totals	77	77.08 hrs	1	1.00 hrs	78	78.08 hrs

7 Subject tables

These are very similar to the faculty tables above.

Illustration 18 : Subject table options

8 Weekly leave returns

As leave is recorded in Staff Manager, the data may be used to generate the weekly leave summary which can be then emailed directly to the relevant authority.

Select the relevant week and ensure that the four fields are filled in at the bottom right hand corner of the screen. These are:

a The name of the person to whom you are sending the form(s).

b Their email address

c The school's own email address (ie. the 'Return address')

d The school's email service provider. This is generally of the form smtp.... followed by the provider's identity, eg. ‘smtp.xtra.co.nz’

You must click in the box above these items to indicate that you are wishing to email the forms, otherwise the green button (the special green button) mentioned below will not be visible. If any of the latter three are incorrect, the email may not be sent successfully. The form(s) is generated as shown below.

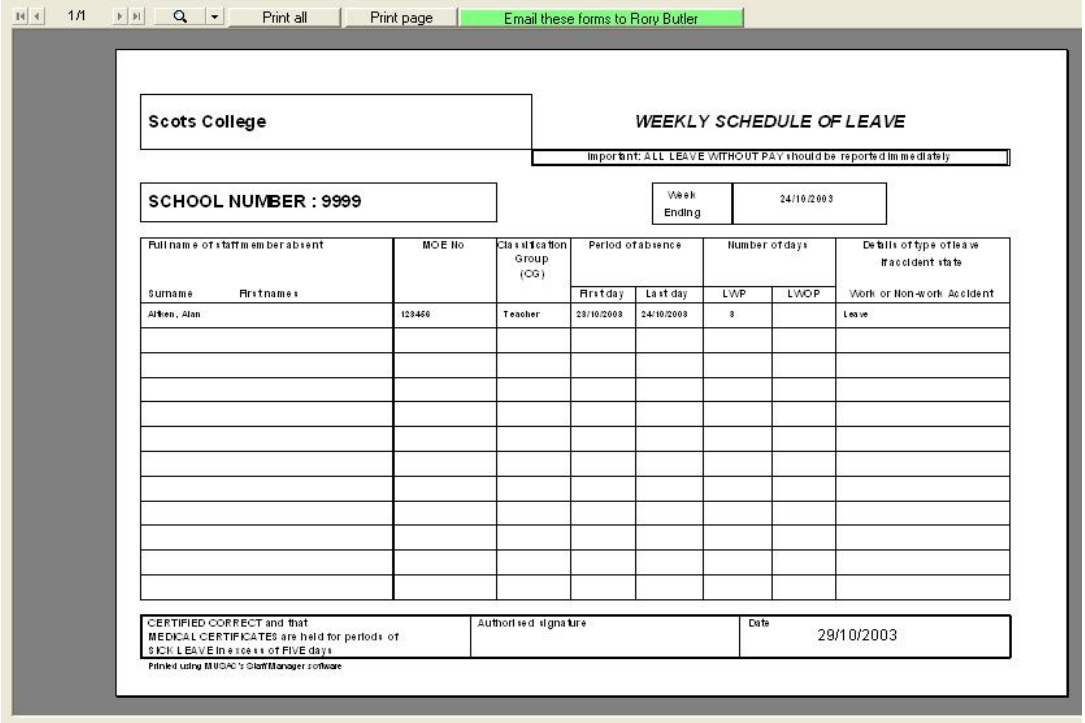


Illustration 23 : A weekly schedule of leave

As with the reliever's returns (below), a copy is kept in the form of a PDF file in a similar directory for later reviewing if necessary.

The illustration above shows a (relatively empty) example form and you can see the green button which, when clicked, sends the relevant email.

9 Weekly relievers' returns

As daily reliefs are recorded via 'Daily Relief', the information can be used to generate the weekly returns to the relevant authority. Select the Monday date of the week for which the returns are to be generated and click 'Generate table'.

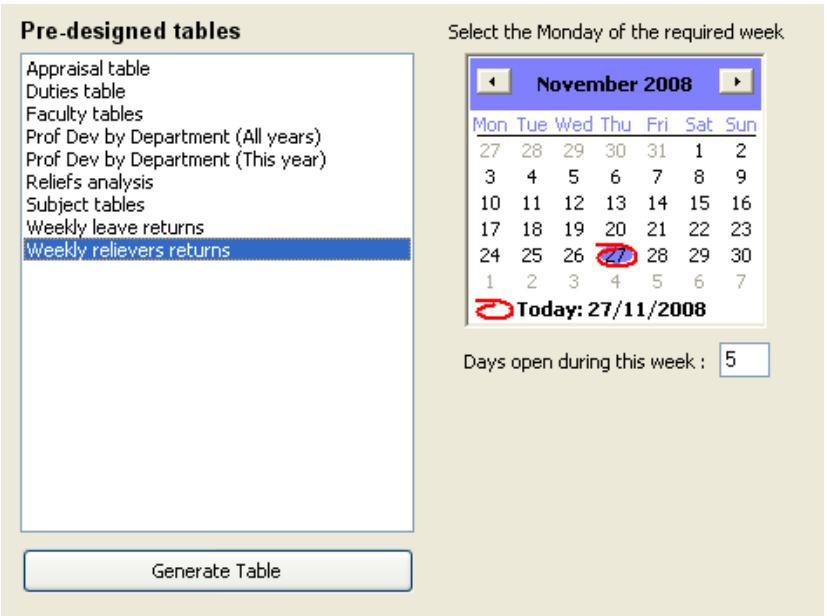


Illustration 19 : Selecting the week

As they are generated, they are also recorded in a PDF file which is saved in a subdirectory titled `\Staff relief files`. These can later be viewed using Acrobat Reader (a copy of which is supplied on most MUSAC CDRoms).

Illustration 20 : A note re the saved documents

The tables themselves appear as shown below, one for each reliever who has been employed during the week in question.

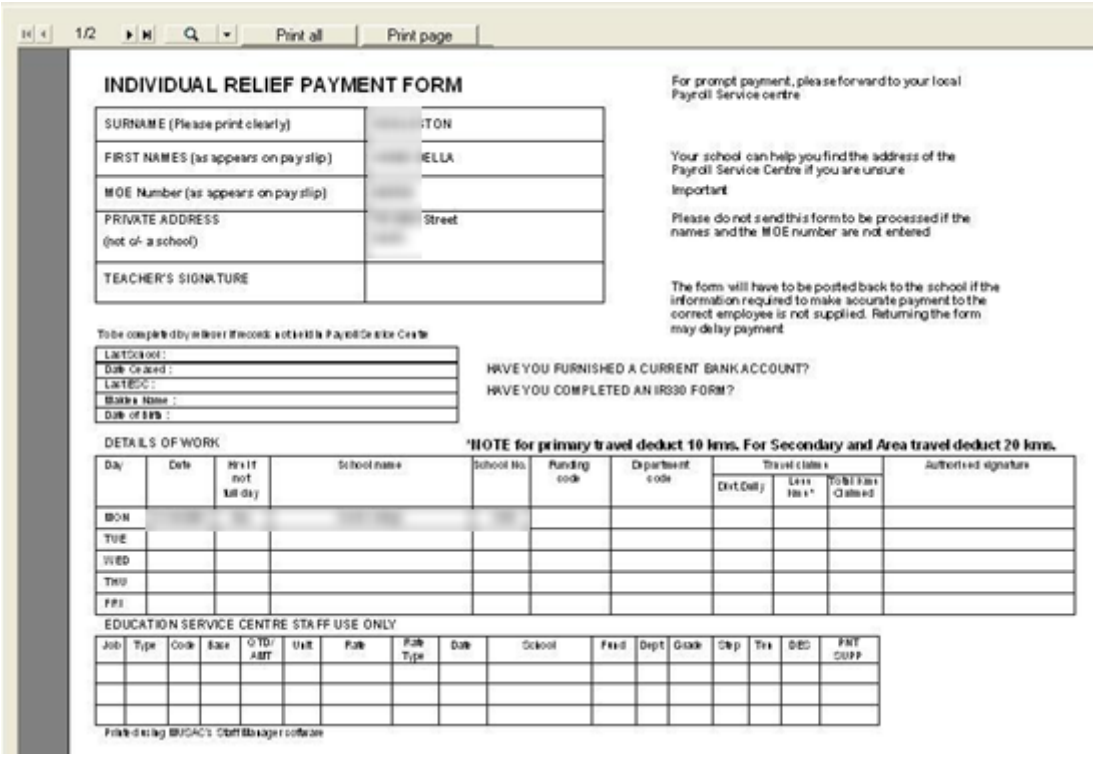


Illustration 21 : A relief payment form - previewed

It may not be possible to fill these tables in completely as each school has its own way of completing certain fields and these can also vary from time to time within a school. Consequently, once generated they should be printed and completed by hand. They also require the signatures of the employee and authorising people within the school.

8.1.4 *User-defined lists*

Click ‘Design your own lists’ and any previously designed and save lists appear on the left of the screen. To reprint one of these, select it and proceed to the 'Select staff' button below the list of lists.

To design a list click ‘Start a new list’, and enter the name of your list in the space provided.

Name lists carefully so that, six years later you will still know what a list reveals by its name. You must also select first 'Family name’, then 'Preferred name’. These two fields will appear on the list format at the bottom of the screen.
Then switch tabs to the 'School' tab, selecting the first three fields - TRN, TRN Category and TRN Expiry date.

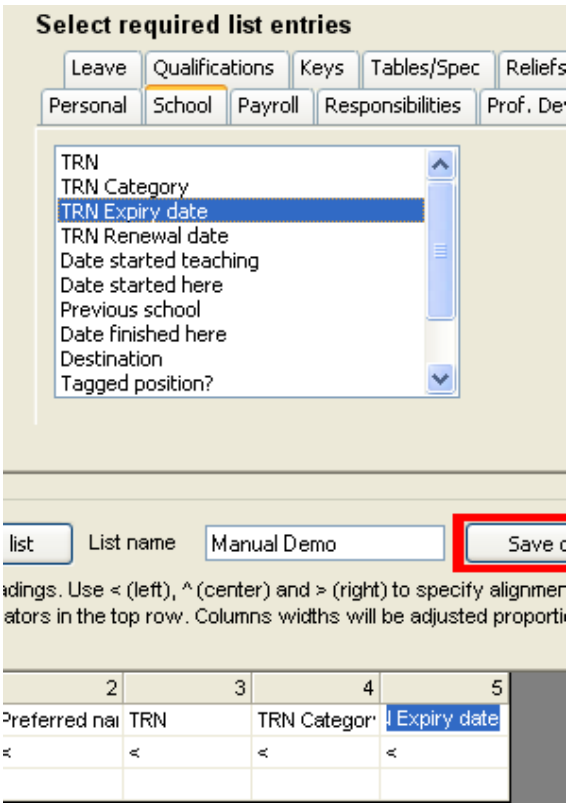


Illustration 26 : The selected fields appear on the list format

The selected fields now appear in the list design frame at the bottom of the screen. Now make some adjustments here.

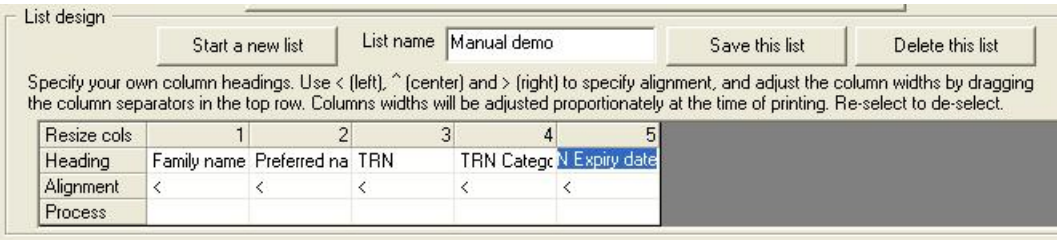
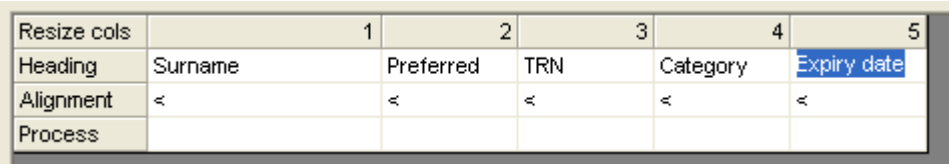


Illustration 27 : The fields ready for further adjustment and specification

The Family name and TRN Expiry date columns have been widened, then several of the columns renamed.



Resize cols	1	2	3	4	5
Heading	Surname	Preferred	TRN	Category	Expiry date
Alignment	<	<	<	<	<
Process					

Illustration 28 : Columns widened and renamed

If you wish the list sorted on one of these columns (by default it will sort on the staff members' names), click in the 'Process' cell at the bottom of the relevant column and select 'Sort'. Similarly, the numeric values in a column can be totalled by selecting 'Total' from the same area.

Once happy with the list click 'Save this list', to be added to the list of lists, shown below.

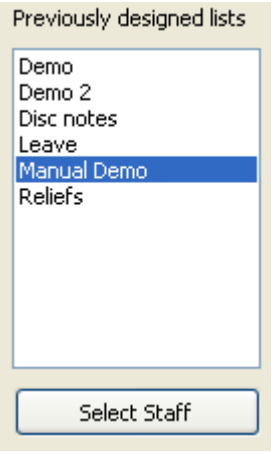


Illustration 29 : We have a new list

Select your new list and click 'Select staff'.

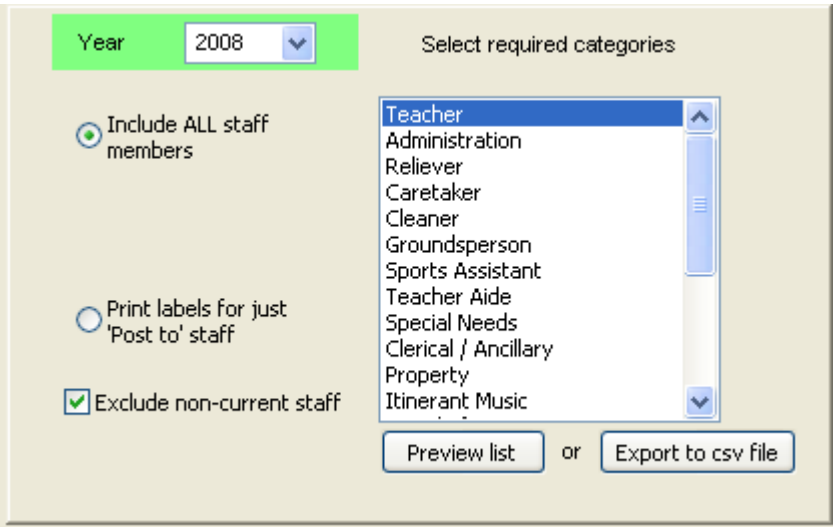


Illustration 30 : The selection of members

The dialogue above will appear. There are only two options - to include all staff (with selected designations) or ‘Post to’ staff. (Remember that, if the main filter area had been

visited and some staff memorised then a third option at this point, 'Filtered staff', would be available for selection as shown below.

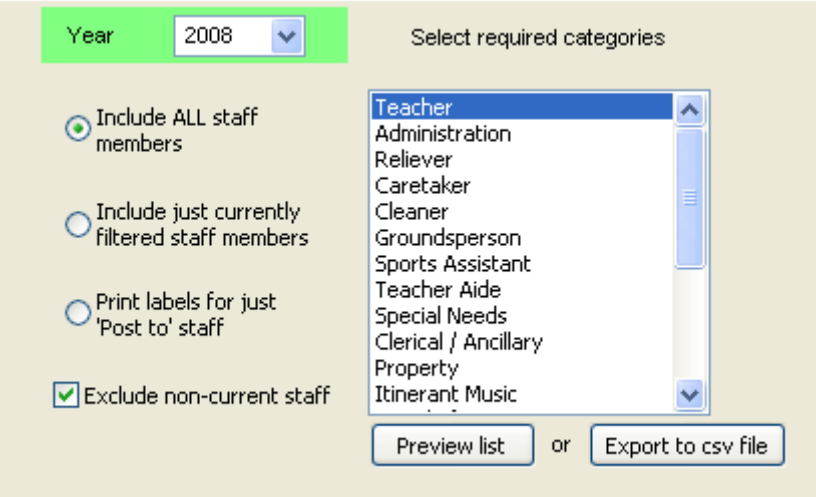


Illustration 31 : Three options to select from

Next, click the 'Proceed to print' button and the list will be generated, and will appear on the preview screen as shown below.

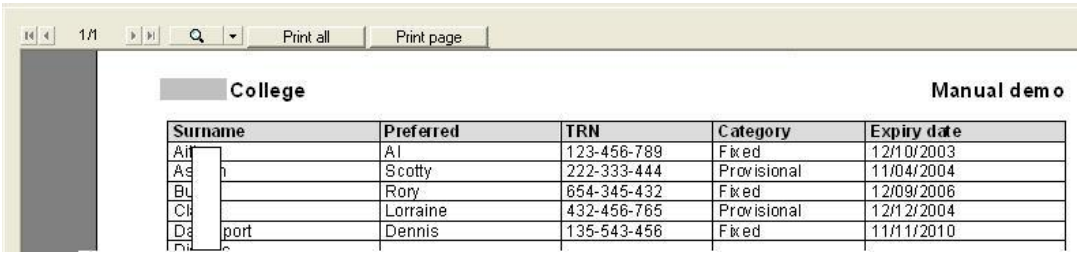


Illustration 32 : Our new list - previewed

The example above includes a small portion of the designed list. You can design your own lists, including the various fields made available via the field-selector tool.

To print your own tables, you must design your own document, with the exception of 'Professional development' – 'Courses attended' and 'Course durations' – both of which generate a list of all courses and times. When saving the file, the file name must start with 'PD list' .... so that the columns are correctly displayed when opened in Excel.

8.2 Designing and printing documents

Click on 'Word Processing' and the Documents screen is displayed, with two tabs at the top. The 'Document design' tab reveals the document design screen.

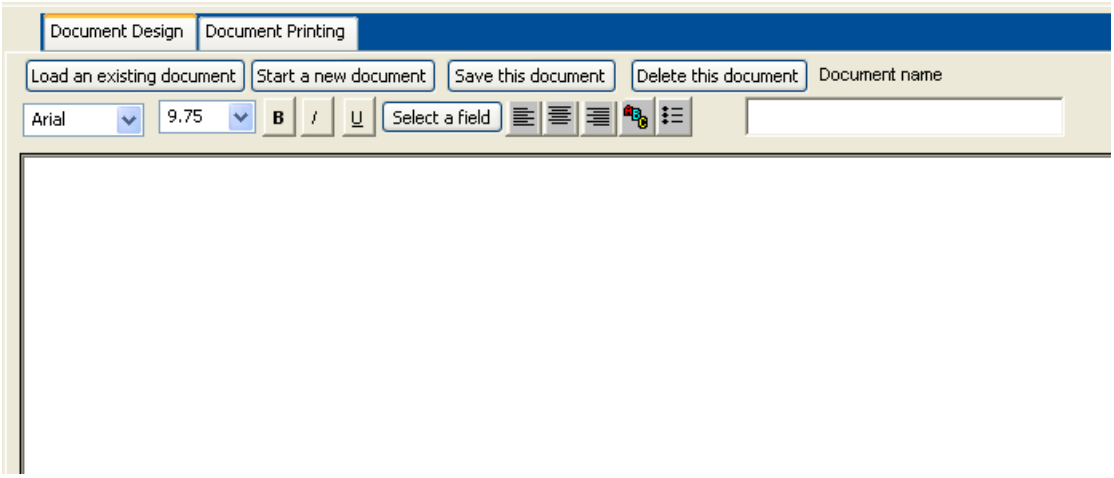


Illustration 33 : A blank document

Initially, your document is blank so you can start typing. The school name and address have been entered and the style of the school name changed, using the normal word processing tools at the top of the window.

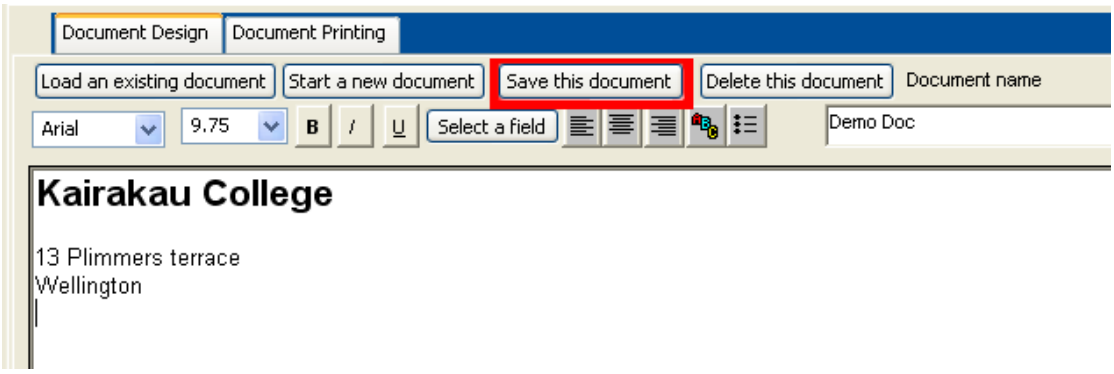


Illustration 34 : The school name and address have been added

To address the document to a staff member, the word 'Dear' has been entered and then 'Select a field' clicked. A selection dialogue appears, for incorporating any field of information relating to a staff member.

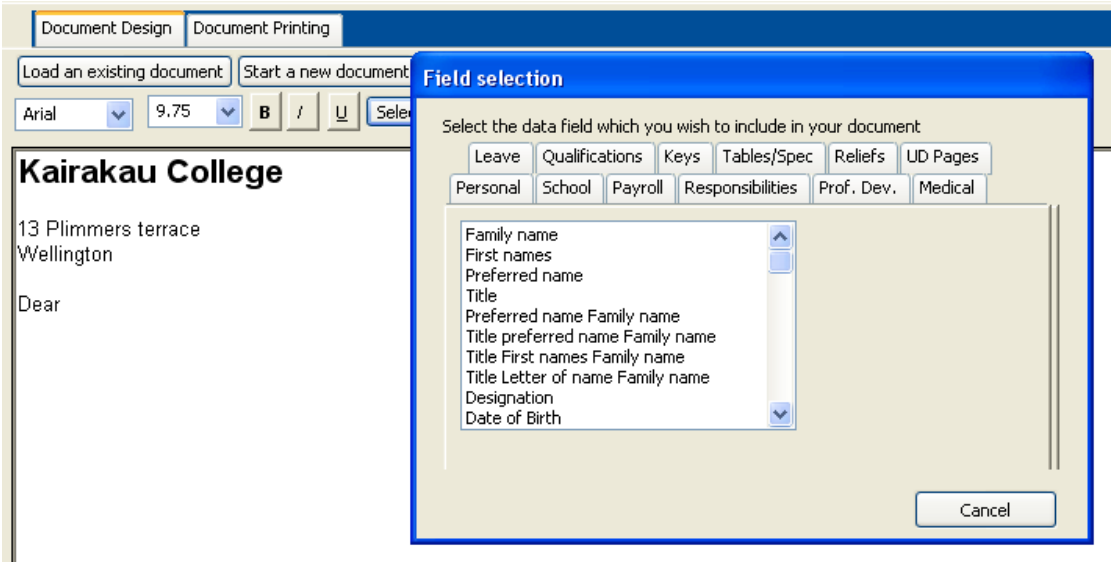


Illustration 35 : Selecting a field to insert

'Preferred name' is selected and the following code appears in the document.

Illustration 36 : The inserted field

A line relating to the member's teacher registration number is added - select its code from the 'School' tab in the 'Field selection tool'.
Next, to add a table display of the member's duties - add a suitable line of text, then select 'Duties' from the 'Tables/Spec' tab. The code 'st.table(12) is added to the document.

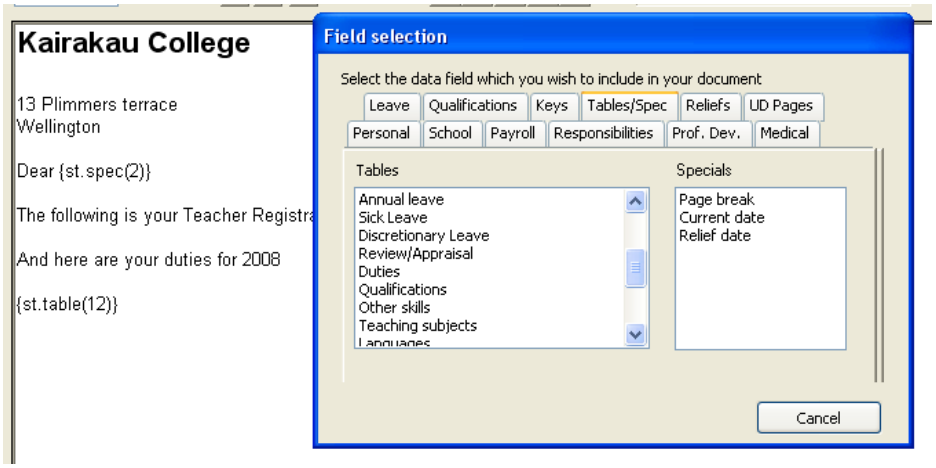


Illustration 38 : Inserting fields

Give the Demonstration document a name, and click on the (now red) 'Save this document' button.

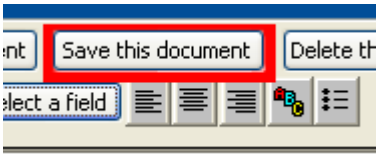


Illustration 39 : Saving the document design

Reload this document at any time by clicking on 'Load an existing document'. Our 'Demo doc' has been added to the list.

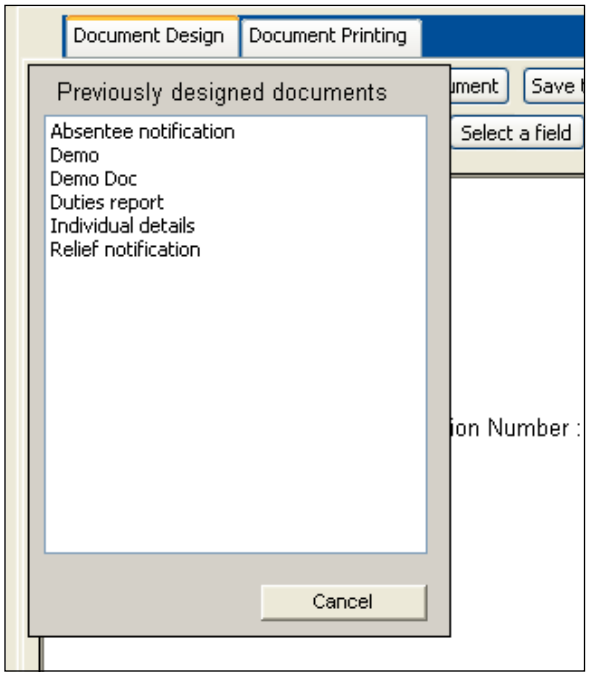


Illustration 40 : The new document is now listed

Now to print the document, switch to the second tab, 'Document printing'. The following screen appears.

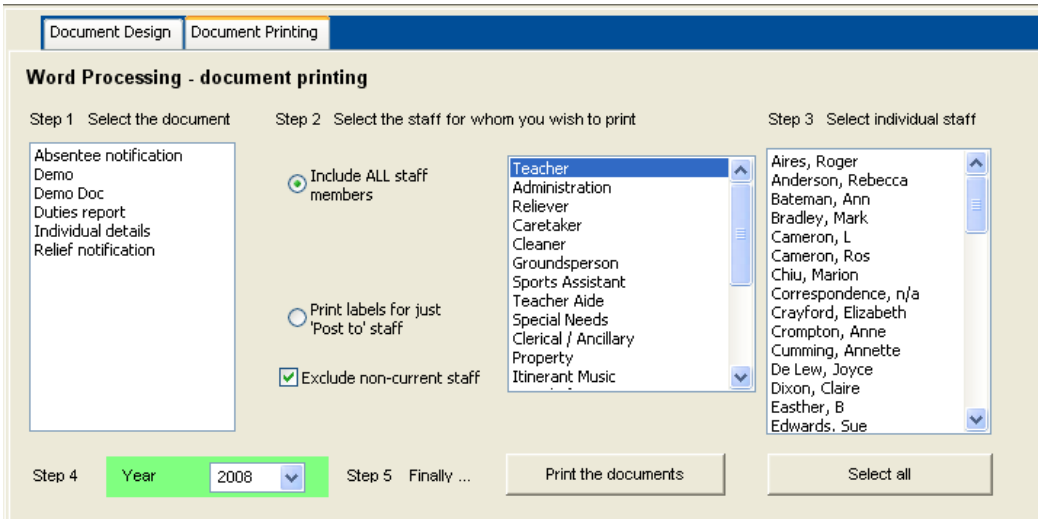


Illustration 41 : The document printing screen

See above the first three steps of the printing process are completed.

1 selected the document
2 elected to print it for 'teachers'
3 selected three particular teachers for whom to generate the document.

Now follow step 4 and click 'Print the documents'.

A further print dialogue appears, click 'OK'.

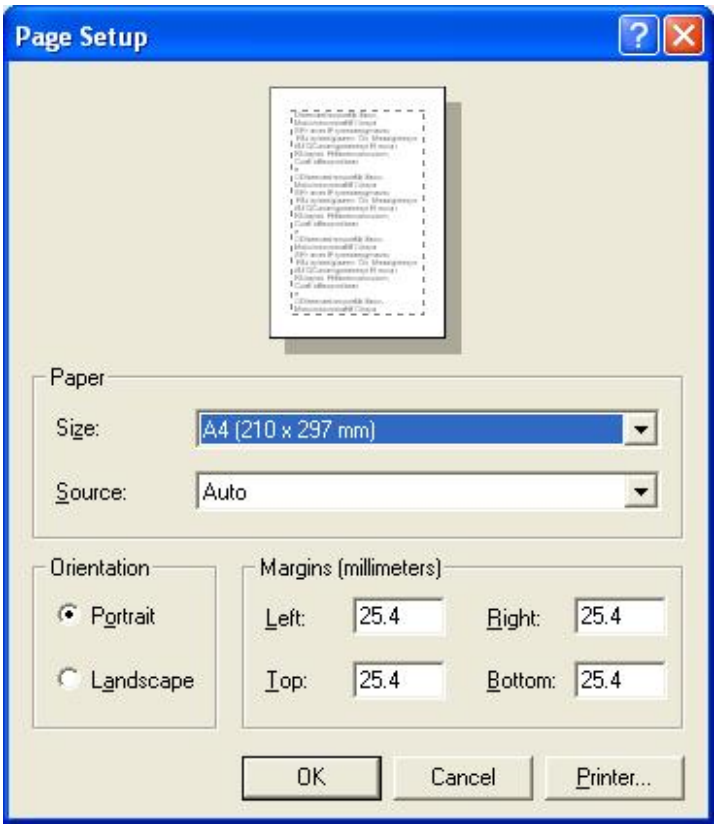


Illustration 42: The print dialogue window

Three documents are generated and the small right-arrow button is clicked to move to the second page (because the first teacher didn't have any duties!)

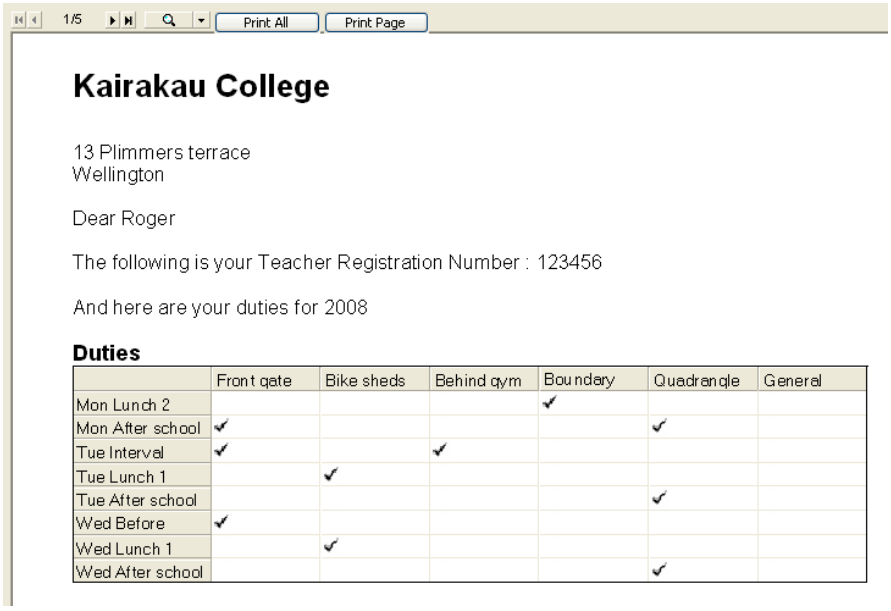


Illustration 43 : Our document is previewed

You can design quite complex documents and use them for your school's own purposes. Two 'pre-designed' documents are supplied, 'Absentee notification' and 'reliever notification'. See more on Daily Reliefs.

The small button at the bottom of the 'Edit members' screen 'Print a document' causes a list to appear of your documents, where you can select one and print it for the currently displayed staff member directly from the editing screen. See below.

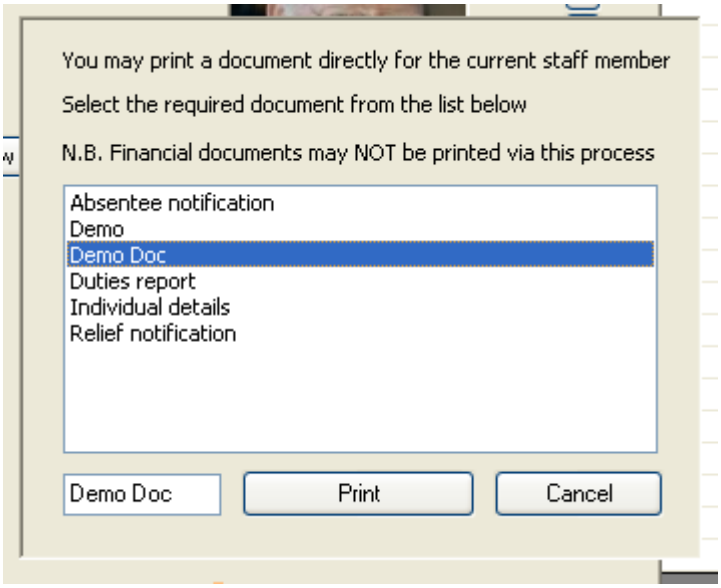


Illustration 44 : Printing a document directly

Finally there are (currently) three extra specials which you can incorporate into your documents. They are the 'Spec' part of the 'Tables/Spec' tab. The three are 'Page break', 'Current date' and 'Relief date', as shown below.

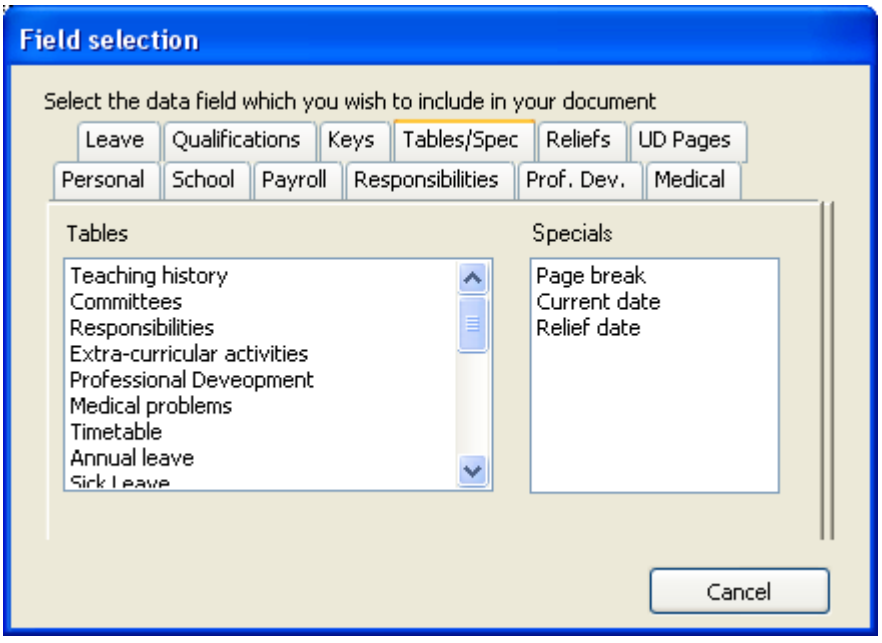


Illustration 45 : Three special insertions

They can be used to control the paging of a document, to have the current date inserted, and have the date of reliefs inserted.

It is also possible to cut and paste a picture, such as your school logo into a document.

9 Utilities

9.1.1 *Overview of utilities*

Utilities offers several support management processes:

1 Duty roster management

This is a tool to enable you to quickly and efficiently design a duty roster.

2 Import/Export

This process is designed to enable you to take a copy of your staff database home to allow you to do day reliefs away from the schoolwork.

3 Archive Management

From time to time you should remove staff members who have left from the database. This utility allows you to transfer them to an 'Archive' database. They can, if necessary, be returned to the main database.

4 OSH

An OSH module has been added which allows schools to manage their OSH requirements:
The identification of hazards
The steps put in place to manage hazards
An incident / investigation reporting module

The main Utilities screen has a series of buttons down the left side, to access the various utilities.

9.1.2 *Duty Roster*

This tool is for designing your duty roster. The duty time slots and areas are configured via the 'Configuration' button.

The main duty allocation screen appears below, with a list of staff members down the left hand side, and the duty roster on the right. The staff list includes the staff members' names, codes, and amount of time already allocated in the roster.

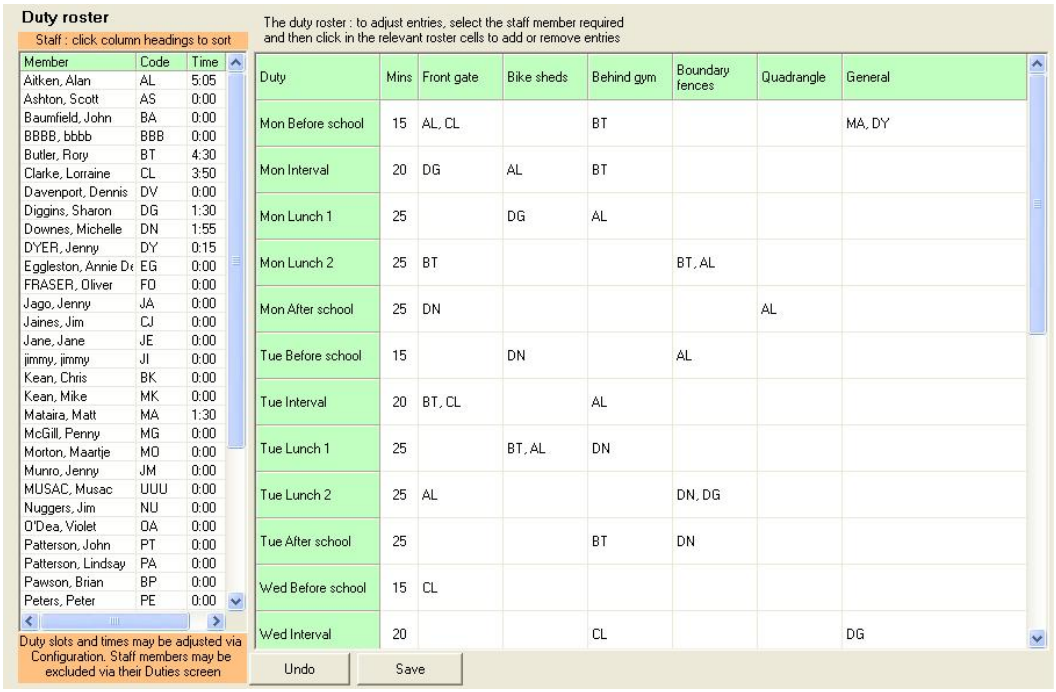


Illustration 2 : The duty roster manager

To add a duty or two to a staff member, select them from the list on the left, and click in the relevant cells on the roster grid. The currently processed member's entries will be highlighted in blue, shown below.

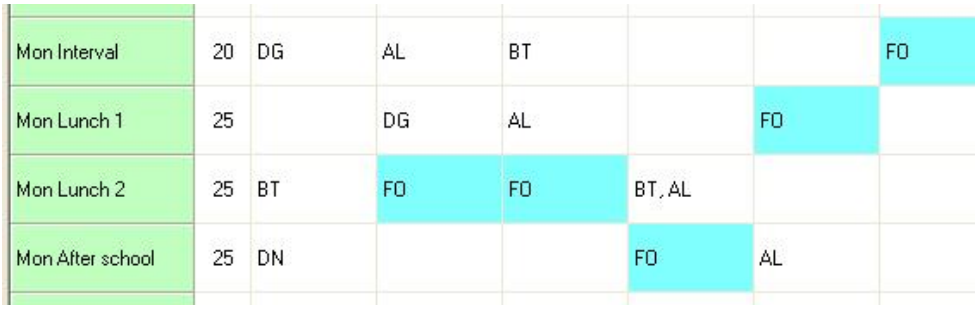


Illustration 4 : Multiple staff in one slot

You can drag and drop over a number of cells and the staff member will be added to each cell (if not already there) and removed from each cell (if already there). At the bottom of the table is 'Undo' which undoes the previous 30 allocations you have made. When you have finished, click 'Save' to record changes against each staff member in the database. One of the pre-designed tables which can be printed is the 'Duty Roster'.

9.1.3 *Import and Export of relief data*

This utility for transferring to your home computer those files necessary to prepare Daily Reliefs away from school. The first screen has some useful information.

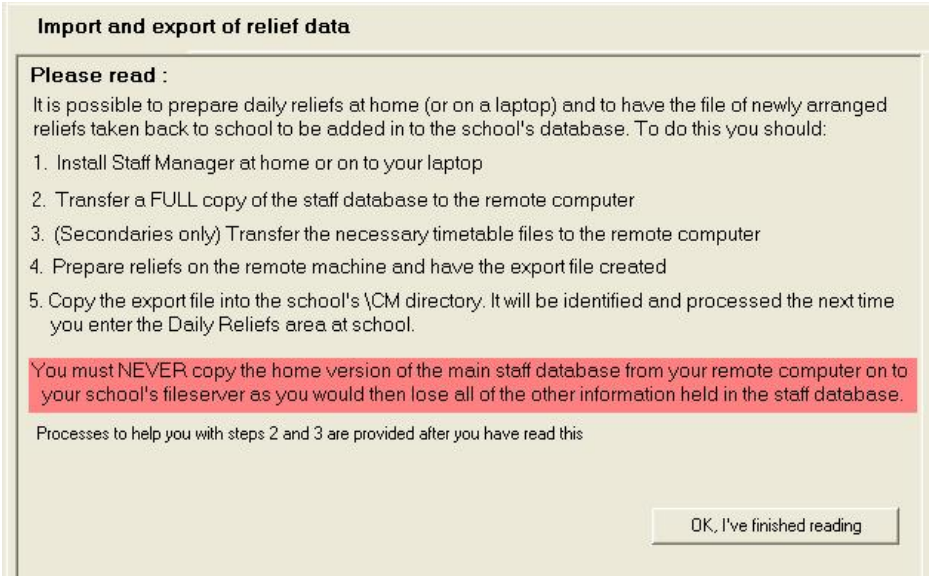


Illustration 5 : Notes concerning the import / export process

Note: See the area in red. It warns that you must never bring a copy of your staff database back from home to your school's file server. If you do , all other information entered at school will be lost. Once you've read the notes, click on the button at the bottom and the message will slide up out of the way. There will be another button to slide it down again for reference in the above position each time you visit this utility.

You will arrive at the export / import screen below.

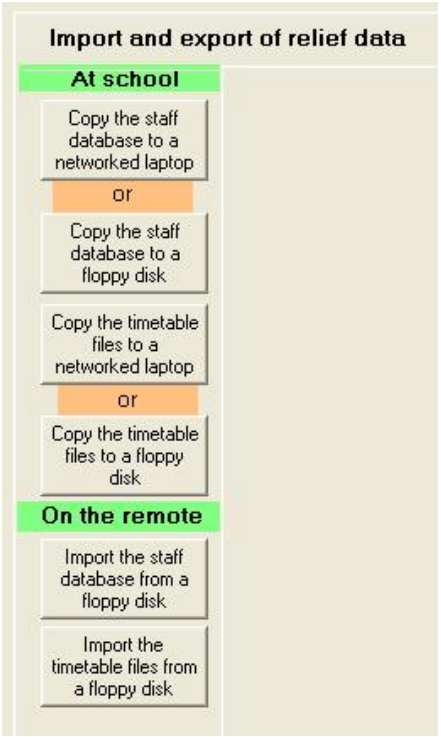


Illustration 6 : The import / export possibilities

The four ‘At school’ buttons relate to the EXPORT via either networked laptop or Floppy disk, of both the staff database and the necessary timetable files. The last two relate to the import of the same where they were exported to a pendrive or floppy disk.

If you have a networkable laptop then the first and third buttons will be all that you require. You can repeat the export as often as necessary to ensure that you have a current database at home.

When Daily Reliefs are organised at home you must get the information created back to your school database. See Daily Relief area for this.

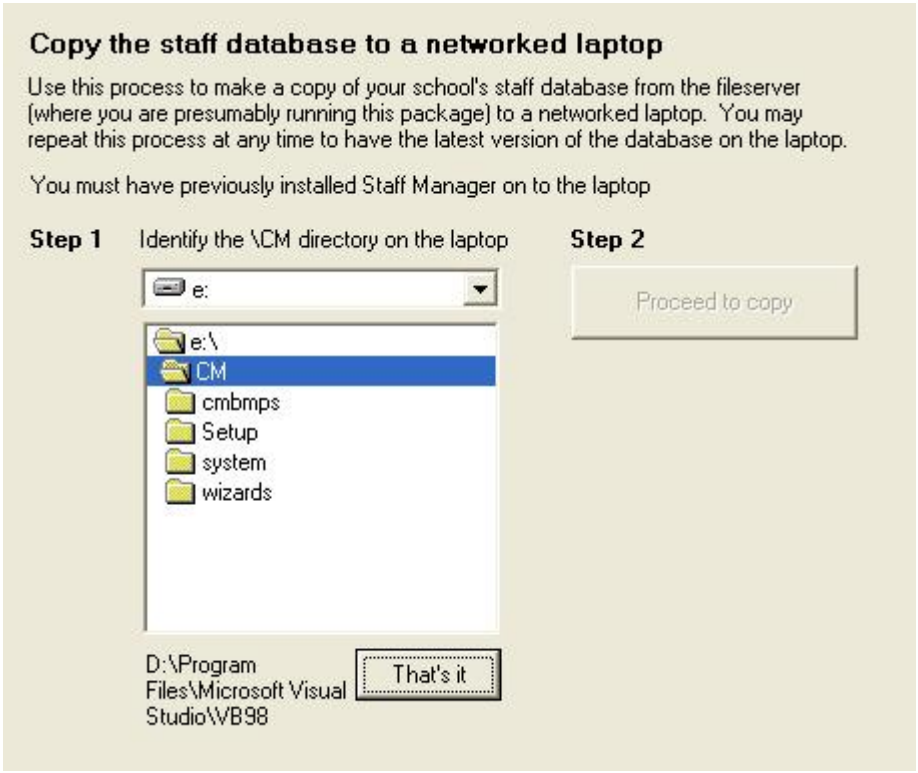


Illustration 7 : Copying to a networked laptop

The first step transfers a copy of the staff database (staff.mdb) to your networked laptop. You should have first installed Staff Manager (and the System Files) onto that machine. Identify the \CM directory on the laptop and click 'Proceed to copy' In the illustration above the 'Proceed to copy' button is not yet enabled because the program has been unable to verify the existence of Staff Manager on the remote machine. Once you have found it and clicked 'That's it', the button will enable so you can copy the file across.

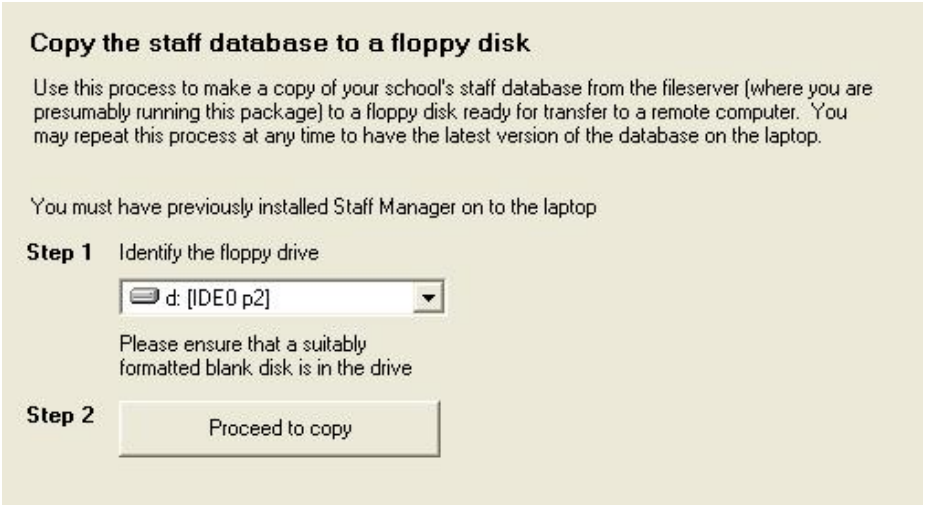


Illustration 8 : Copying the database to a pendrive

The second process zips up a copy of the staff database and copies it to a pendrive or floppy disk, ready for transport to the remote computer. Obviously, in the example above, a disk needs to be inserted in drive A: (or pendrive inserted) and to have that drive selected.

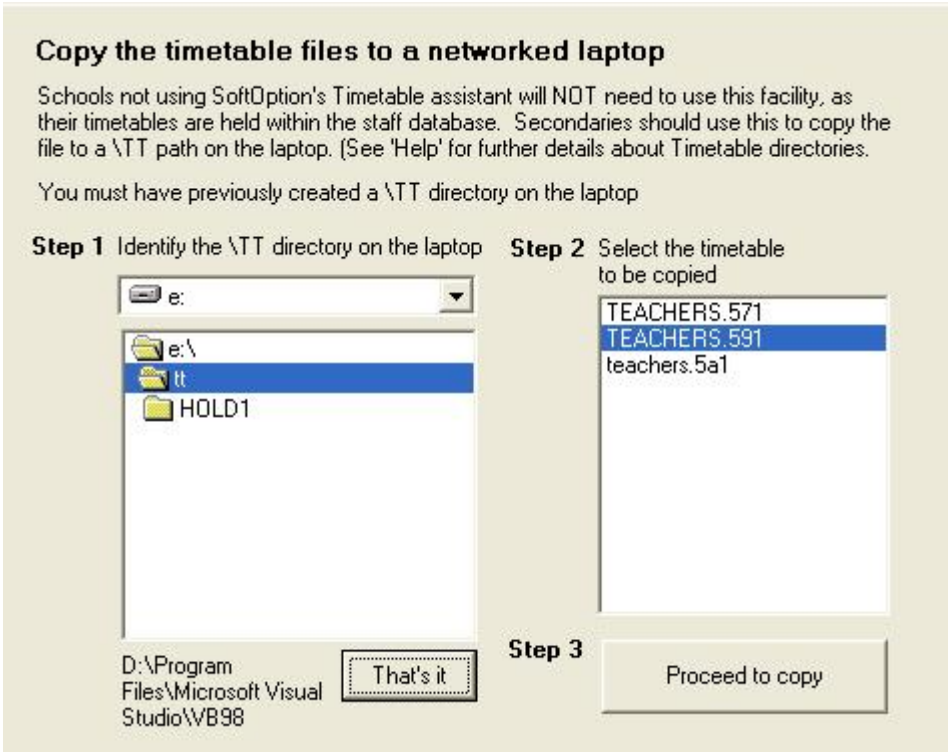


Illustration 9 : Copying the timetable files to a laptop

'Copy the timetabled files to a networked laptop' copies two timetable files (eg. teacher.591 and Stats.591) from the timetable data directory to the relevant equivalent on the laptop. You may have to create a suitable \TTSM directory on the laptop, using Windows Explorer.

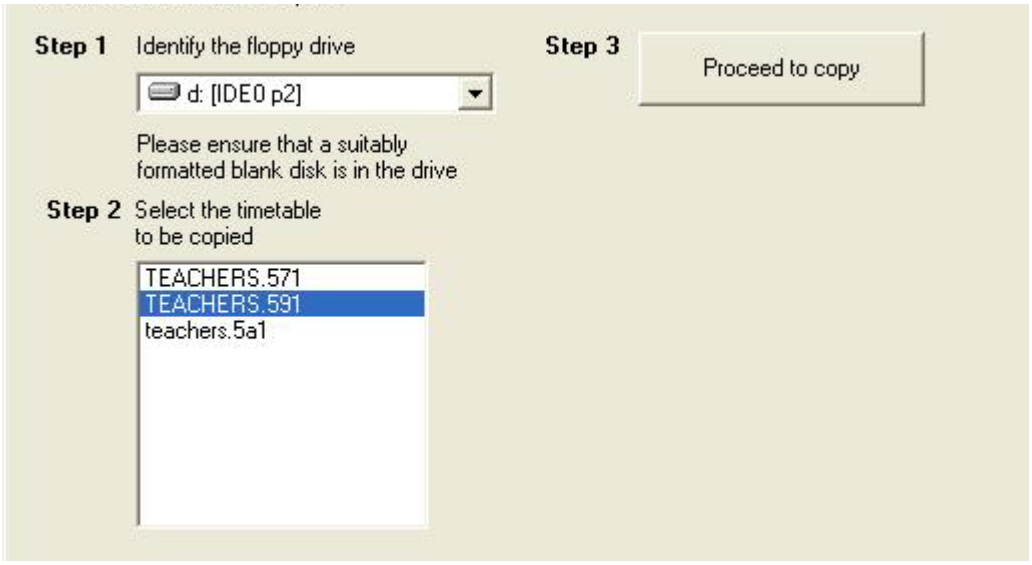


Illustration 10 : Copying the timetable files to a pendrive

You can export the two files (zipped up) and copied to a pen drive.
If you transferred the relevant files via a networked laptop then importing is not necessary as the files will already be in place.

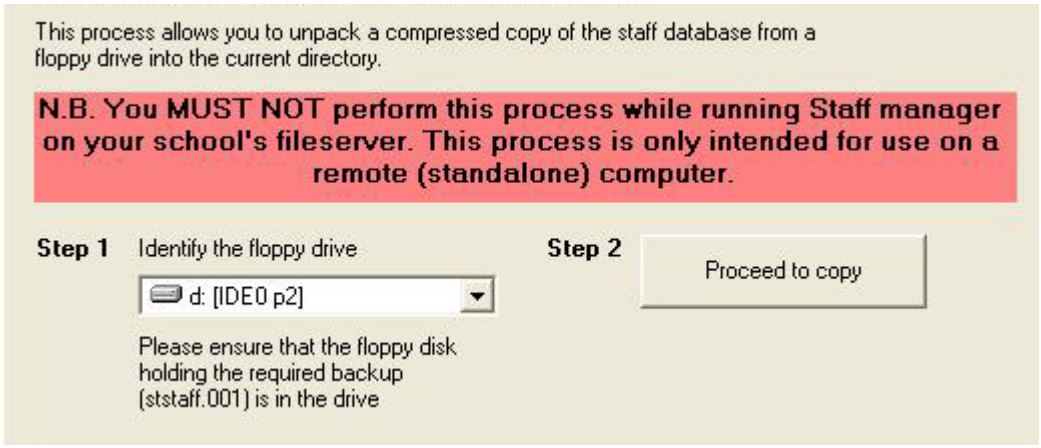


Illustration 11 : Importing the staff database

To import the staff database, identify the pen disk holding the compressed file and click 'Proceed to copy'. The file will be unpacked into your remote \CM directory.

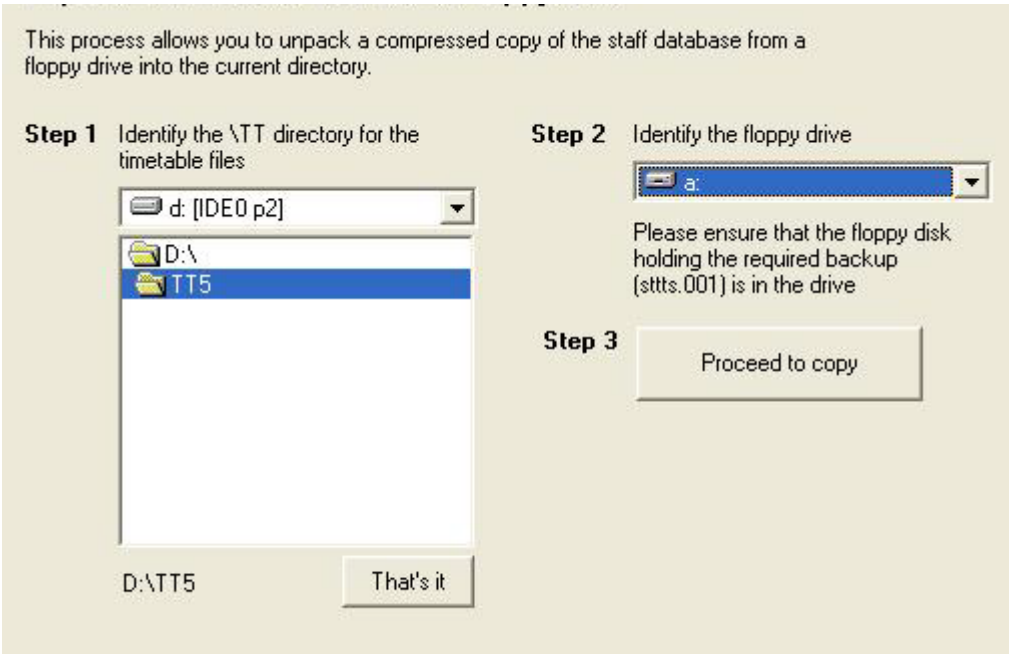


Illustration 12 : Importing the timetable files

The two timetable files are unpacked and copied to your remote computer's timetable data directory in a similar manner.

9.1.4 *Archive Management*

Periodically transfer staff members who are no longer teaching at your school to the archive database, as follows.

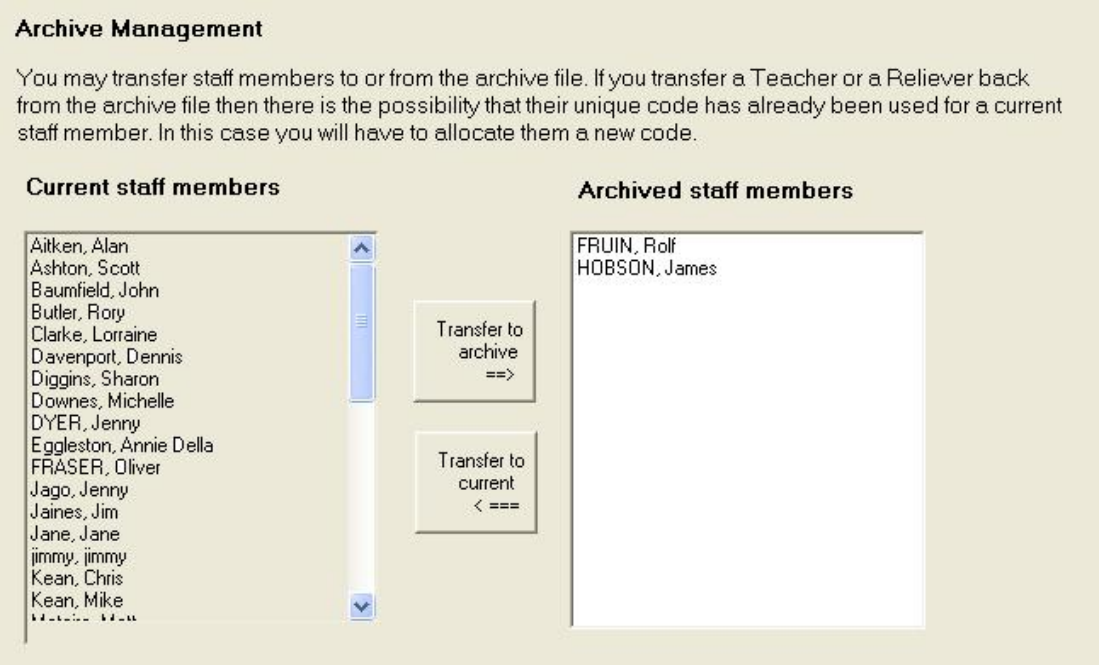


Illustration 14 : The archive management screen

Members of the current database are listed in the left columns, and those in the archive in the right column. Select one or more staff members from either list and to transfer them, using the appropriate button, to the other database.

Note: If you are using ClassRoom Manager or Student Manager you should delay the removal of staff members from the current database until AFTER you have transferred leavers to the relevant leavers' database in that module, because transferring leavers includes making a copy of the current staff database for use in conjunction with the leavers.

9.1.5 *OSH Management*

You can generate the following:

- A list of your Health and Safety representative(s).
- A list of identified hazards and their management policies and processes.
- A list of recorded incidents involving staff members (any employees) and/or students from your school, or visitors to your school. Each incident **must** be accompanied by an investigation record. Both incident reports and investigation reports and recorded and printed via this function.
- A search of incidents and investigations for a particular word or phrase, and print selected incident reports or investigation reports.

The incident and investigation processes are also included in Student Manager where they may be accessed via each student's 'Medical' screen. Only those incidents relating to the selected student will be displayed in Student Manager.

The module is accessed via the OSH button under 'Utilities'.

Click OSH for the OSH screen. This consists of five tabs. Initially the third tab, which displays a list of previously entered incident/investigations is displayed, as shown below.

At the top of the screen is a small OSH logo which, when clicked, will lead you directly to the OSH website, provided you are connected to the web.

Representatives

If a centre either has more than 30 employees, or if an employee requests, the centre must appoint a Health and Safety representative. Each centre may have up to five Health and Safety representatives. For further details visit the OSH website at http://www.osh.dol.govt.nz The representatives screen is shown below.

Illustration 17 : The representative(s)

A number of training providers run two-days courses for your Health and Safety representatives and it can be indicated via the above screen whether or not each has yet attended one of the registered courses.

Hazards
It is the responsibility of each school to identify any and all hazards which represent a threat to its employees or members of the public who are lawfully on the premises (therefore includes staff, students and visitors), and to put into effect policies aimed at eliminating, isolating and/or minimising each. Details relating to identified hazards may be entered via the Hazard management tab.

Incidents and Investigations
The 'Incident reports' tab shows a list of previously recorded incidents. Details of both the incident and its investigation are held in the same record in the database, and details from these reports are shown on the list.

At the bottom of the screen you can add a new incident. The other buttons relate to the ability to search the list of incidents for those involving a particular word or phrase. Enter the required word or phrase into the text entry area and click 'Search'. Any incidents involving the entered text will be displayed (and the others will be hidden). You can use the right hand button to display all of the recorded incidents.

Illustration 19 : Buttons at the bottom of the list screen

To enter an incident report, click on 'Add a new incident' and the following screen will appear.

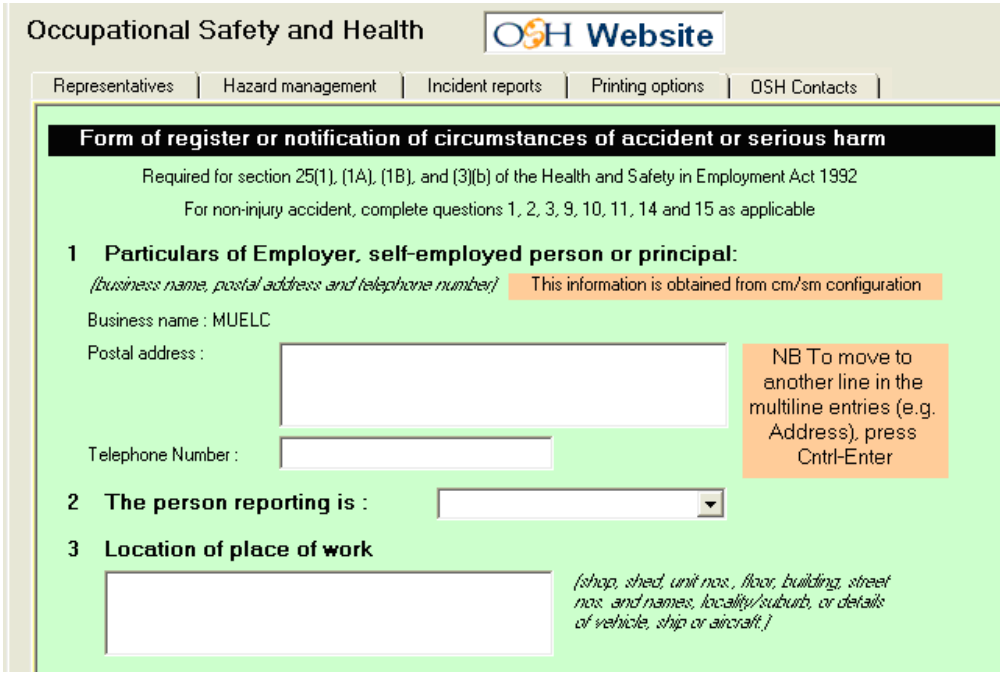


Illustration 20 : Viewing / entering an incident report

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

The full incident report form is shown below.

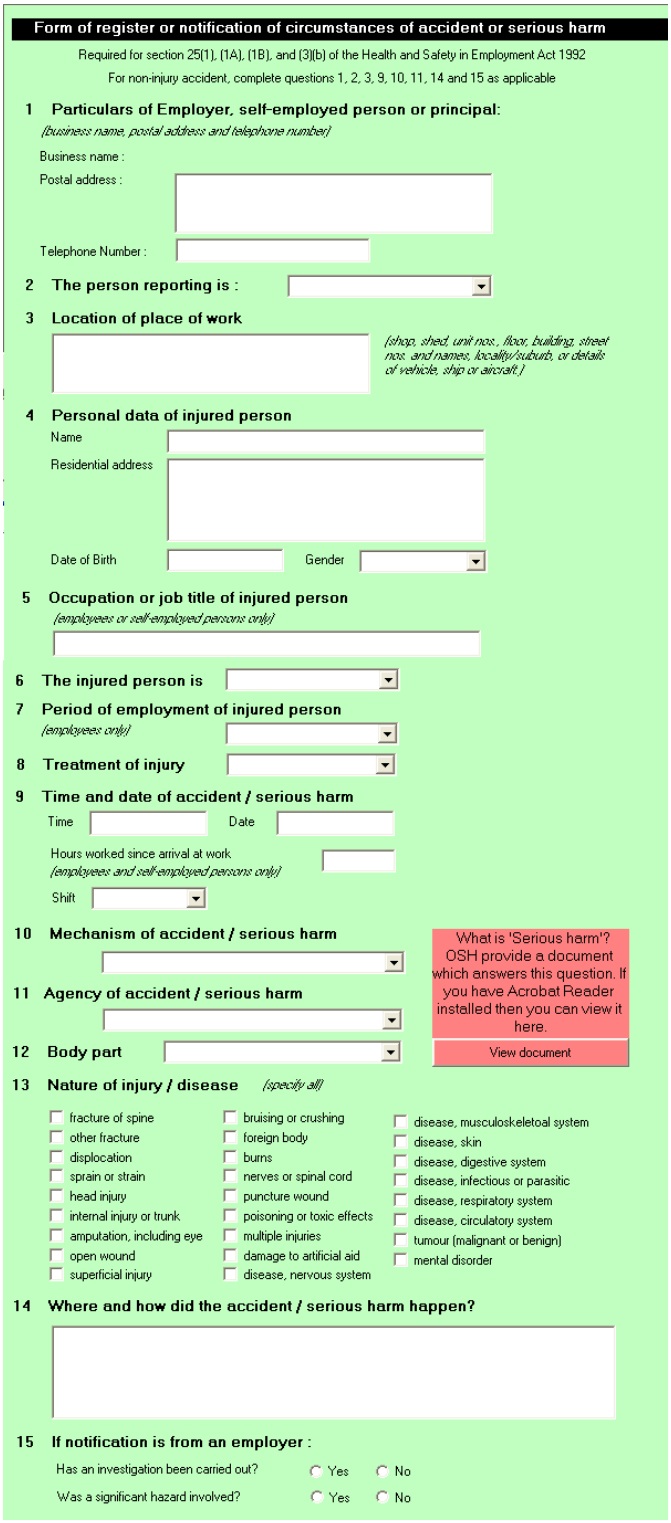


Illustration 21 : The full incident entry screen

Half-way down the document, alongside the area relating to the nature of the harm is a red shaded area whichasks '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 red button at the bottom of the message.

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)

At the bottom of the incident report screen are several buttons, shown below.

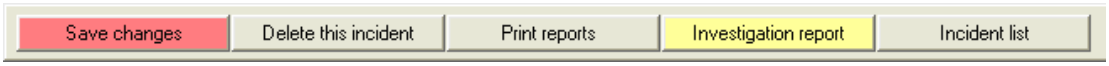


Illustration 22 : The bottom-of-screen buttons

'Save changes' will become red whenever you change an entry on the form. Once you have finished your changes, click this to have them saved back to both the database and the display grid. This will also return you to the list of incidents.

The second button allows you to delete an incident which you either entered in error, or no longer require.

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

'Incident list' returns you to the list of incidents.

The 'Investigation report' button shaded yellow, to draw it to your attention, takes you to the accident investigation report screen (lemon), a portion of which is shown below. This is completed in the same way as the green incident report form.

Illustration 23 : Viewing / entering an investigation report

The full accident investigation screen follows.

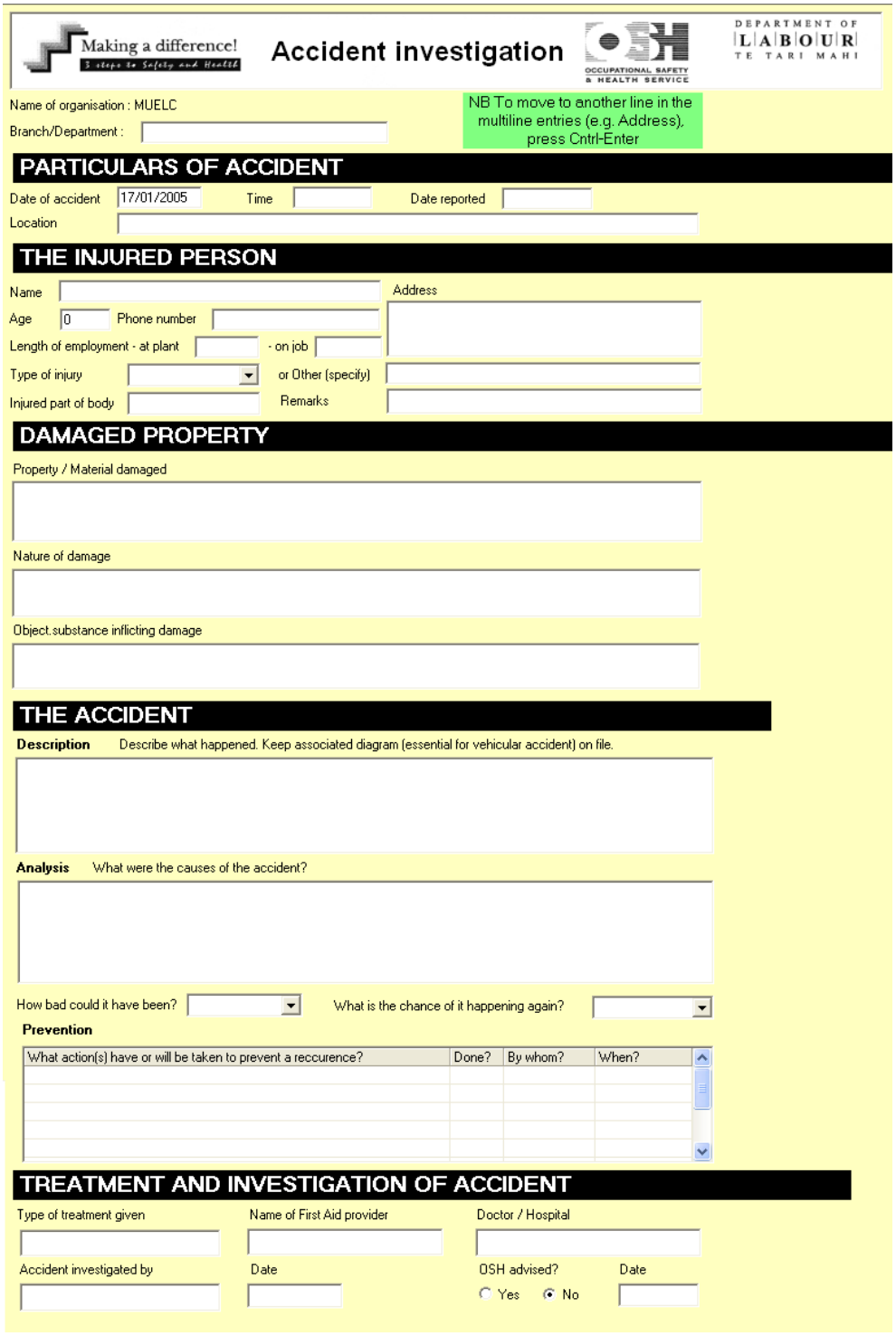


Illustration 24 : The full investigation report

Click ‘Print reports’ at the bottom of the incident report screen for the printing screen, with your two reports displayed ready for final checking and, if desired, printing. Click the small ‘printer’ button at the top of the print area. Next to this are others where you can enlarge or reduce the display. A section of this screen follows.

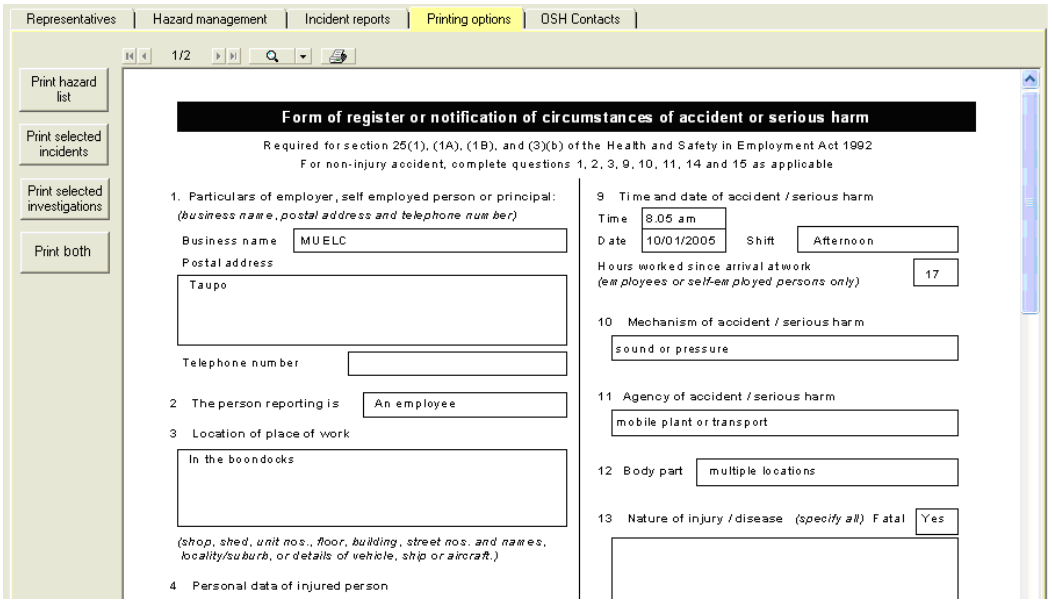


Illustration 25 : A printed incident report

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

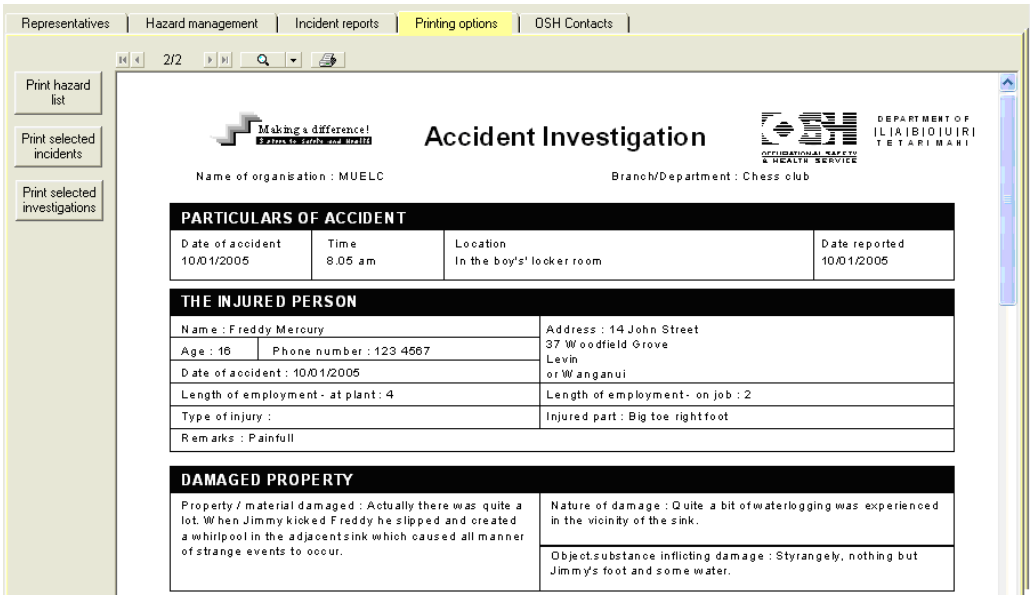


Illustration 26 : A printed investigation report

At the bottom of the accident investigation report are areas for you to have the form signed by the relevant person. These are shown below.

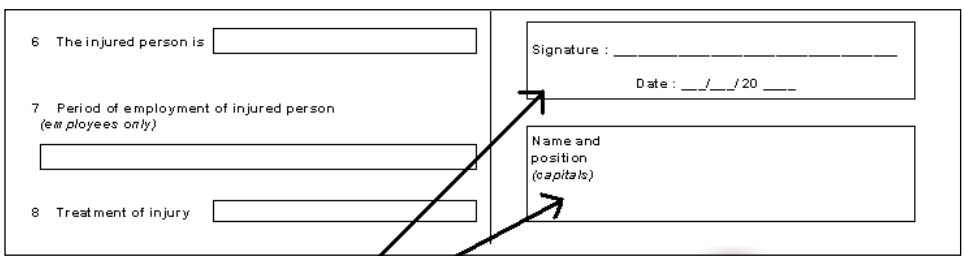


Illustration 27 : The bottom of the incident report

Printing options

The penultimate tab takes you to the screen below, where you may print

- a list of hazards
- selected incidents
- selected investigations

The screen below shows a list of the two hazards entered.

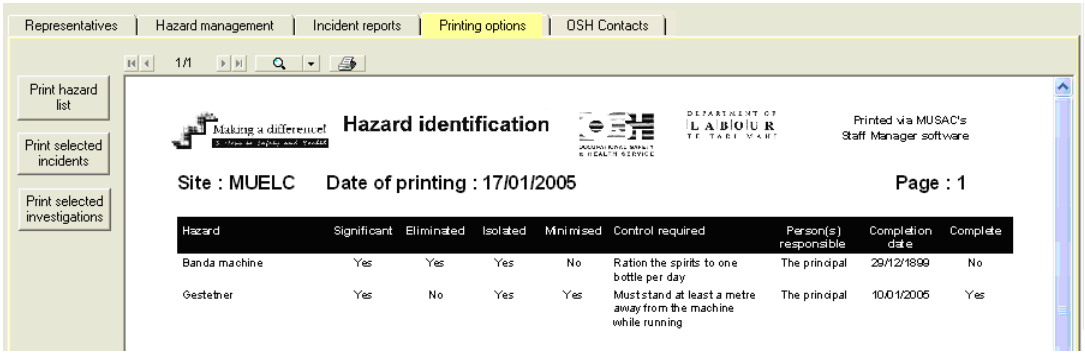


Illustration 28 : A printed list of hazards

If you select to print either incidents or investigations (or both), you will be given the list to select those you wish to print. An example of the selection of two incidents is shown below.

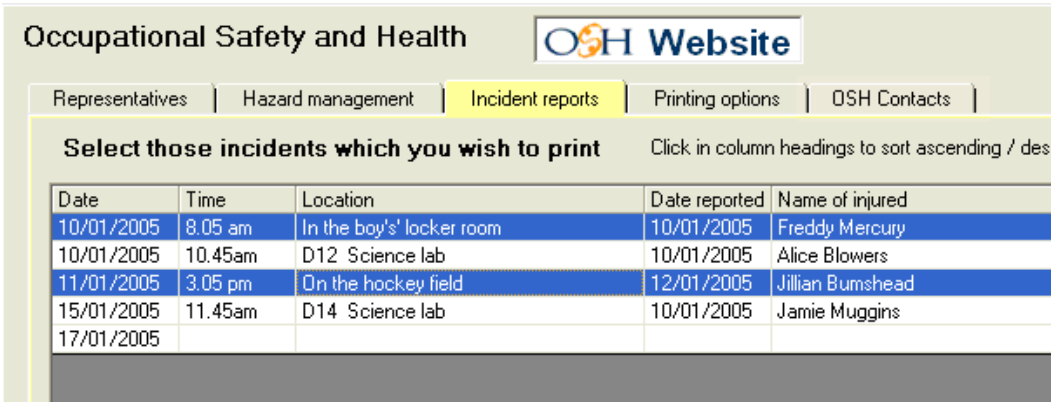


Illustration 29 : Ready to print selected incidents

At the bottom of the screen are the familiar buttons with the addition of 'Proceed to printing' which prints the selected incidents or investigations.

Illustration 30 : The bottom-of-screen buttons

These will be displayed back on the printing screen, where they may be examined (using the magnifying glass!) prior to printing. There are now more than one page available; move backwards and forwards through the printed pages using the arrow buttons pointed at below.

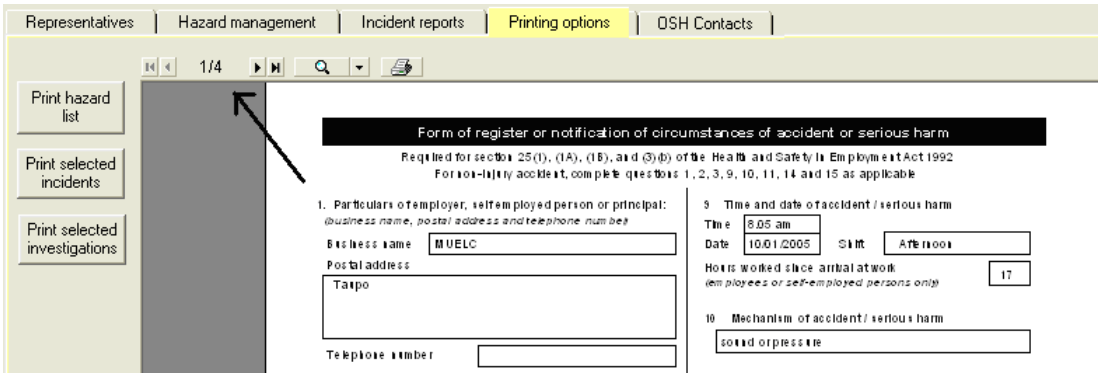


Illustration 31 : The multiple display of printed reports

OSH contacts
The final tab takes you to a list of OSH contacts throughout the country.

Illustration 32 : The OSH contact details screen

On the left side of the screen is a list of the various regions. When you click on a particular region, the contacts for that region will be displayed on the right hand side of the screen, as shown below.

Illustration 33 : Details for a selected region

If you have selected a region, by clicking 'Print selected region' on the left, you can obtain a printed version of the relevant contact details – to take to your phone.
This list will be updated from time to time. A hyperlink at the top of the screen takes you directly to the equivalent page on the OSH web site.

10 Alarms

10.1 The configuration of alarms

See 'Configuration' for alarm settings. If you have switched 'alarms' ON then, each time you enter the program, or on request, the program will check for any dates relating to events which are due to occur in the next xxx number of days. (xxx is the number specified on the screen below).

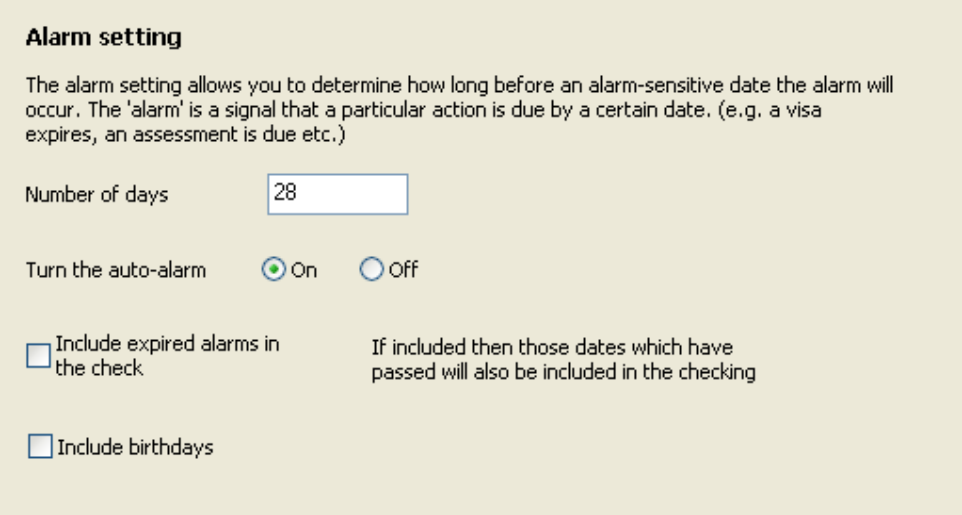


Illustration 1 : Alarm settings

On this screen you can specify

a The number of days in advance which upcoming dates will be listed.

b Whether the auto-alarm is turned off or on. If it is turned ON then, each time you enter the package, the database will be checked for upcoming dates within the specified number of days and, if any are found, the 'Alarm' button will begin flashing.

c Whether or not you wish to include recently passed dates (expired alarms) in the search.

d Whether or not you wish to have the check include staff members' birthdays.

10.1.1 *The use of alarms*

There are several important dates associated with staff members. These include :

- birthdays
- TRN expiry dates
- contract renewal dates
- visa expiry dates

It is possible to have these dates monitored so that either when you enter the package each time, or at any time on request all relevant dates can be checked for any occurring within the next xxx days.

The 'Check alarms' button at the top of the main screen takes you to the alarm testing screen.

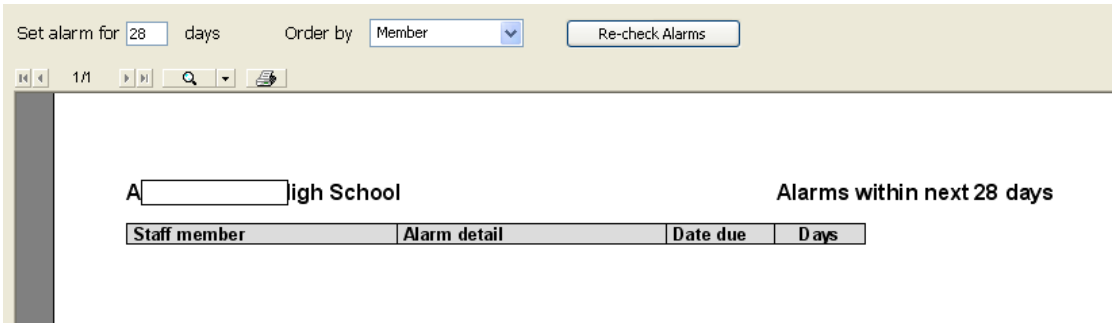


Illustration 2 : The alarms screen

At the top of this screen is the number of days in advance for which dates are checked. The large green 'Check' button causes the check to occur and any resulting dates will be listed. An example of one such date is shown above.

If alarm testing is switched ON (via Configuration) then, as you enter Staff Manager each time the dates will be checked. If any dates are found the ‘Check alarms’ button will flash red, alerting you to enter this area to check for dates.

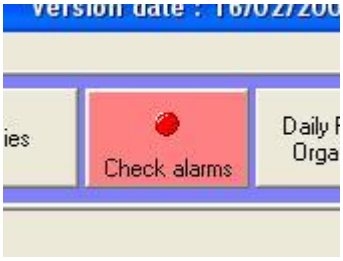


Illustration 3 : The flashing alarm

Clicking any other button will cause the flashing to stop.

11 Day reliefs

11.1 Overview of day reliefs

If a teacher is absent and someone takes his/her classes while away, these are Daily Reliefs. This functionality enables you to arrange daily reliefs, identifying one or more absent staff members and nominating either relievers or free staff members to cover the classes involved.

Staff Manager links to the current timetable, either extracted from our Timetable Assistant files, or, in the case of schools not using that software, from the teachers' timetables entered via the personal page and stored in the staff database (see Timetable and its source).

There are two main ways of entering reliefs. You can either do it one absent teacher at a time, or you can select several absent teachers and view their reliefs all at once.
In addition to those being relieved, it is also possible to record absences for others who may be otherwise occupied elsewhere in the school for the day. Their 'absences' may also be recorded and printed via the daily schedule.

11.2 Single teacher entry mode

The main screen is shown below, for single-teacher entry mode. The appearance of this screen alters if you are running in 800 x 600 screen resolution. The best screen resolution for this is 1024 x 768, set via start > Control Panel > Display > Settings.

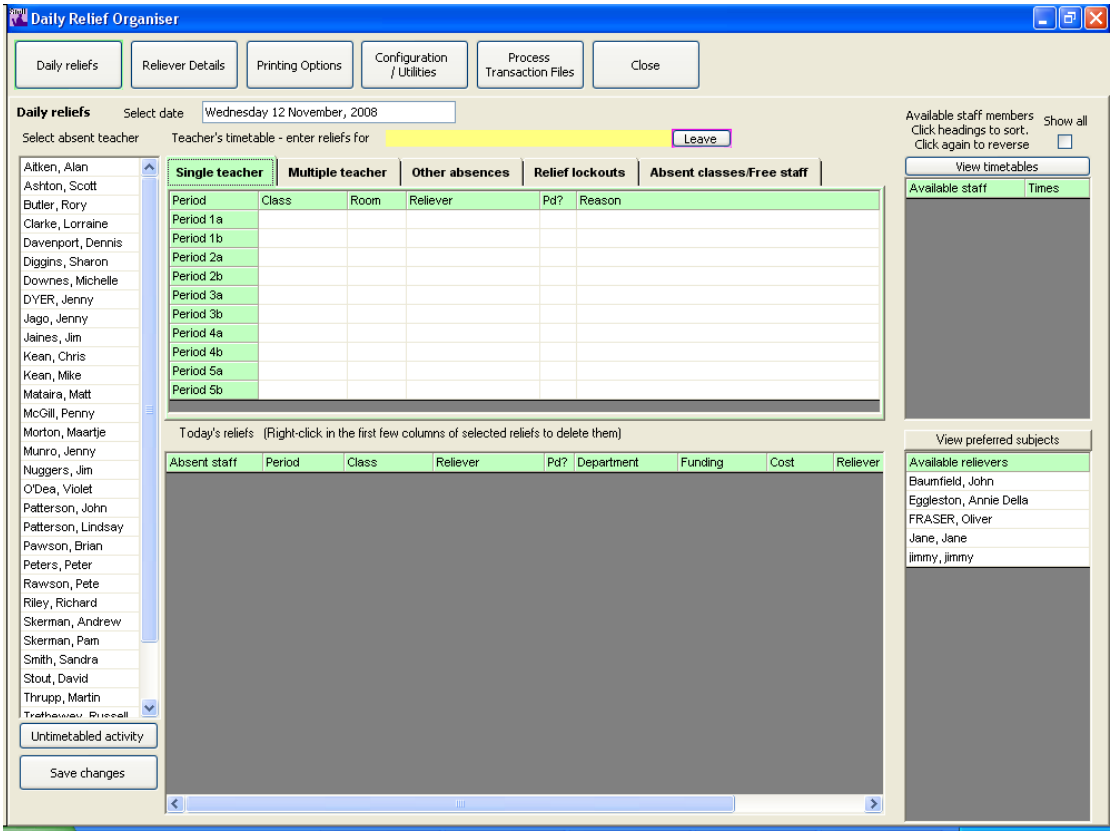


Illustration 1 : Single teacher entry mode

Across the top of the screen are the main buttons.

In the centre of the screen are two tables. The upper one displays the current timetable and reliefs arranged for the currently selected absent teacher. The lower half of the screen displays all of the reliefs arranged for the current day.

Down the left side of the screen is a list of your staff members from which you select absent staff.

To the right are two further lists. The leftmost of these is a list of the relievers available to cover the selected periods (or duty timeslots). The right- list is a parallel list of those teachers who are free in the selected period(s) or duty timeslots.

At the centre top of the screen is the currently selected date. To change the date click in the date area and a calendar will drop down from which you can select the day to arrange reliefs.

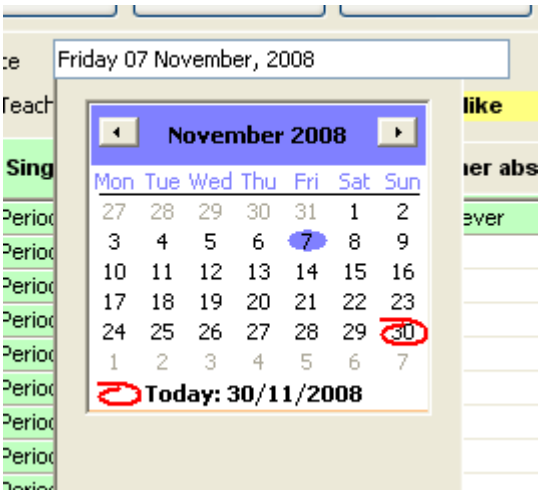


Illustration 2 : Using the calendar to select the day

By clicking on the date Sunday 30 November 2008 it appears in the box above and the calendar slides out of the way.

Next from the list on the left select Mike Kean whose timetable for the day is displayed. His duties for the day are NOT displayed. This is an option which you can elect to include via Configuration > Utilities.

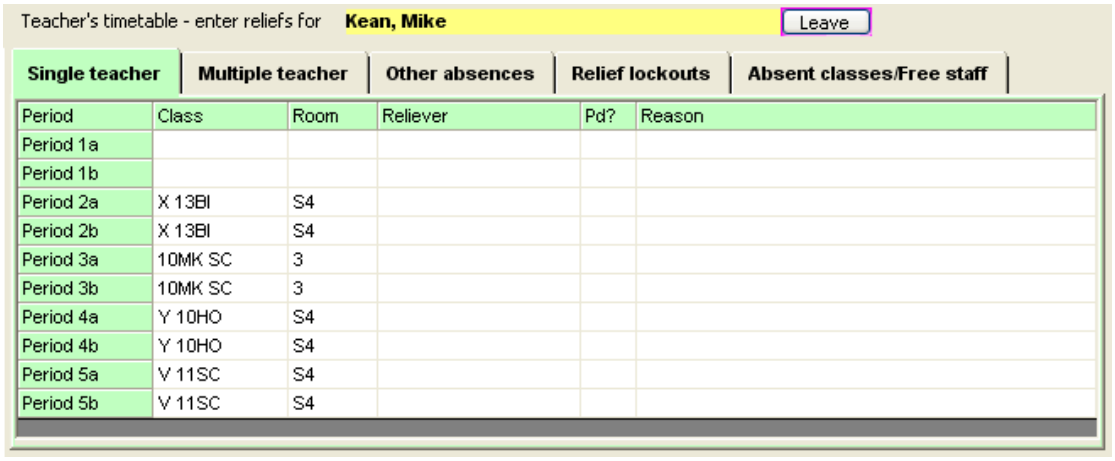


Illustration 3 : Four periods to cover

Drag the cursor down over the periods which require cover. On releasing the mouse, those relievers available are displayed in the list on the right. The far right hand list, of available teachers, was empty as there was no-one available to cover all of these periods.

Notice that the periods have been split in two. That is an another option you have, see Configuration > Utilities

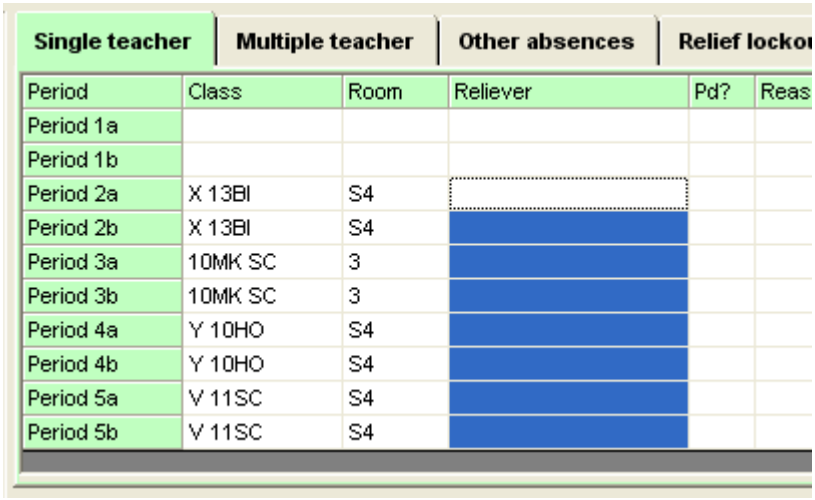


Illustration 4 : The selected periods

In the bottom right corner of the screen is the available relievers for all of the selected periods (some names used in testing!)

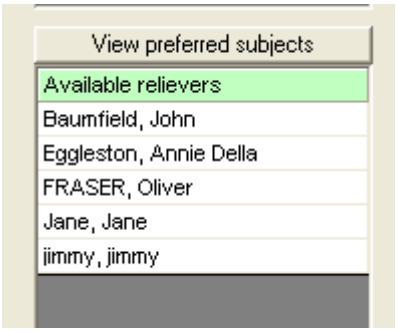


Illustration 5 : Available relievers

Which reliever would be best suited to cover Mike's Science classes? Click on the button above the list of relievers to 'View preferred subjects' and a horizontal slide out occurs.

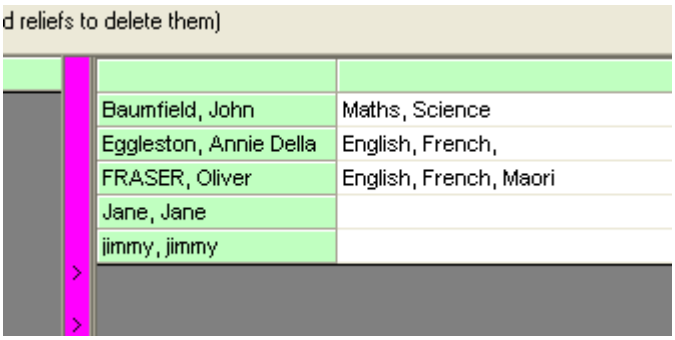


Illustration 5 : Relievers preferences

Only two of the relievers have preferred subject lists, and neither of these include science. Selecting Fraser Oliver from the list, he is allocated to the reliefs selected, shown below.

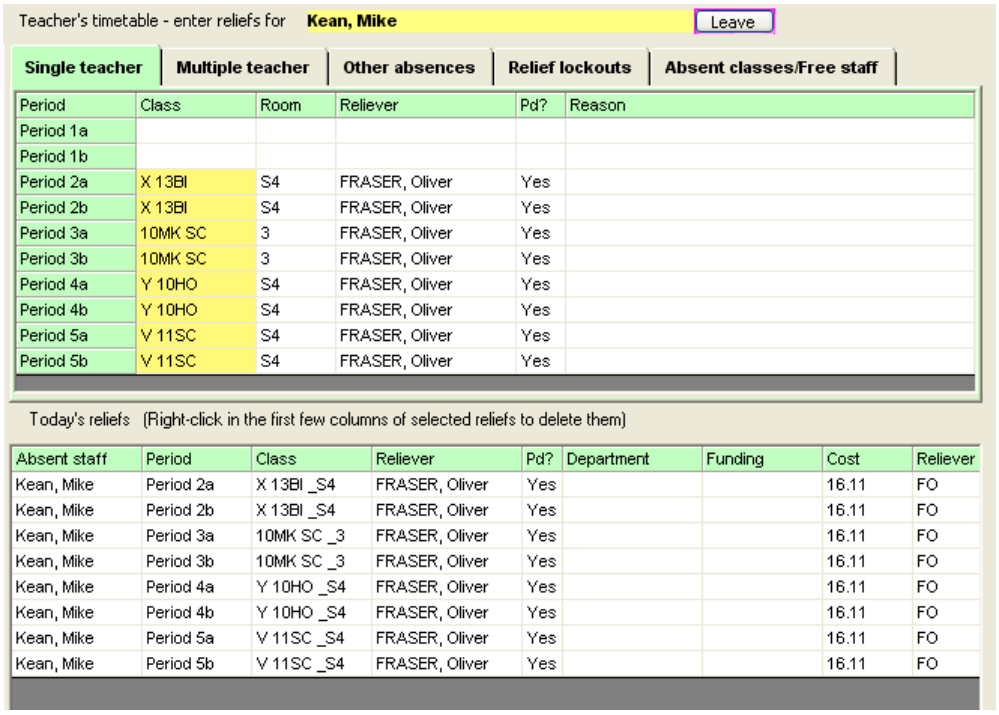


Illustration 7 : The allocated reliever

The 'Paid' column is filled with 'Yes' as relievers are hopefully paid. In the lower screen, notice that several reliefs have been arranged for the day. With the reliever's hourly rate (from their personal Payroll details), and each half period consisting of 30 minutes, the gross payment from each period is displayed. $16.11 for half an hour doesn't sound like a realistic amount. The reason for Mike's absence is not yet specified. Click the reason column for the pull-down menu offering several possibilities – specified by Pay Serve.

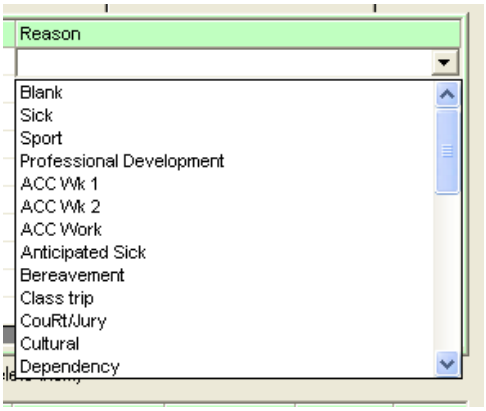
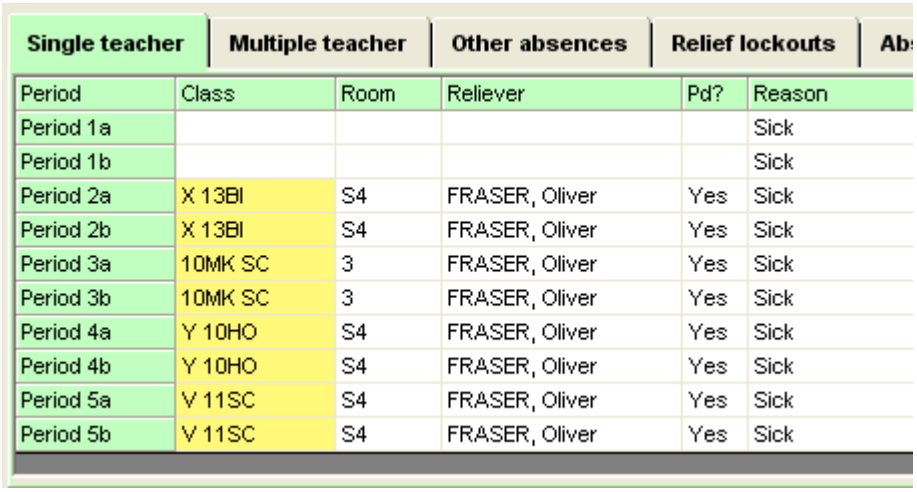


Illustration 8 : Selection of the reason

Select 'Sick' and so the periods are filled in the upper display. If Mike had been sick in the morning and attending a course in the afternoon then I would have filled in 'Sick' for the day, then re-clicked at the start of the afternoon and filled in 'Professional development'. You have the opportunity to overwrite (or not) existing reasons.

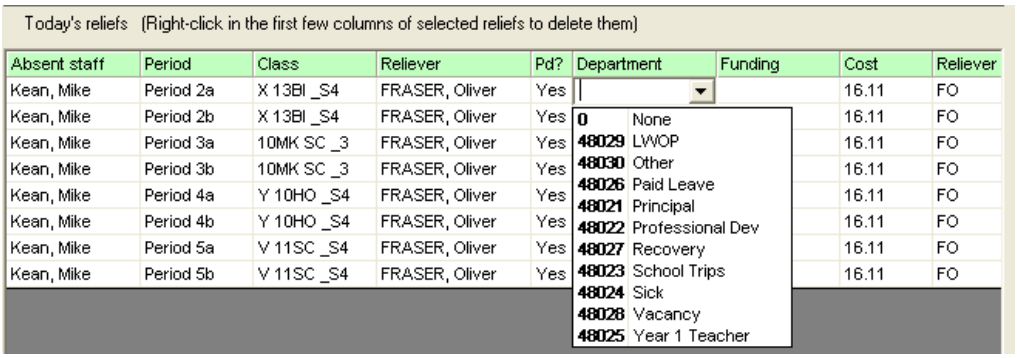


Single teacher | Multiple teacher | Other absences | Relief lockouts | Ab

Period	Class	Room	Reliever	Pd?	Reason
Period 1a					Sick
Period 1b					Sick
Period 2a	X 13BI	S4	FRASER, Oliver	Yes	Sick
Period 2b	X 13BI	S4	FRASER, Oliver	Yes	Sick
Period 3a	10MK SC	3	FRASER, Oliver	Yes	Sick
Period 3b	10MK SC	3	FRASER, Oliver	Yes	Sick
Period 4a	Y 10HO	S4	FRASER, Oliver	Yes	Sick
Period 4b	Y 10HO	S4	FRASER, Oliver	Yes	Sick
Period 5a	V 11SC	S4	FRASER, Oliver	Yes	Sick
Period 5b	V 11SC	S4	FRASER, Oliver	Yes	Sick

Illustration 9 : The reason in place.

In the lower half of the screen, where the individual reliefs are listed, identify two further details relating to the reliefs. The first of these is the 'Department', and, clicking in the department column, see those departments specified by Pay Serve, shown below.



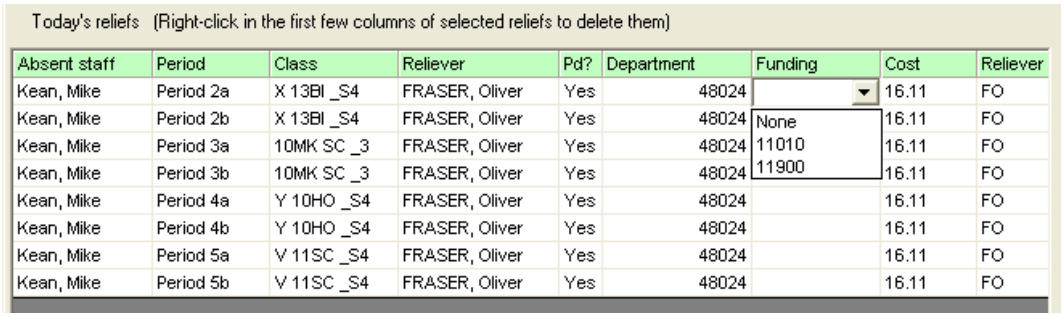
Today's reliefs (Right-click in the first few columns of selected reliefs to delete them)

Absent staff	Period	Class	Reliever	Pd?	Department	Funding	Cost	Reliever
Kean, Mike	Period 2a	X 13BI _S4	FRASER, Oliver	Yes			16.11	FO
Kean, Mike	Period 2b	X 13BI _S4	FRASER, Oliver	Yes			16.11	FO
Kean, Mike	Period 3a	10MK SC _3	FRASER, Oliver	Yes			16.11	FO
Kean, Mike	Period 3b	10MK SC _3	FRASER, Oliver	Yes			16.11	FO
Kean, Mike	Period 4a	Y 10HO _S4	FRASER, Oliver	Yes			16.11	FO
Kean, Mike	Period 4b	Y 10HO _S4	FRASER, Oliver	Yes			16.11	FO
Kean, Mike	Period 5a	V 11SC _S4	FRASER, Oliver	Yes			16.11	FO
Kean, Mike	Period 5b	V 11SC _S4	FRASER, Oliver	Yes			16.11	FO

0 None
48029 LWOP
48030 Other
48026 Paid Leave
48021 Principal
48022 Professional Dev
48027 Recovery
48023 School Trips
48024 Sick
48028 Vacancy
48025 Year 1 Teacher

Illustration 10 The selection of the Department

Also specify the contents of the 'Funding' column, shown below. Both of these are dealt with, see the eInputs process for submitting relief / leave details to Pay Serve.



Today's reliefs (Right-click in the first few columns of selected reliefs to delete them)

Absent staff	Period	Class	Reliever	Pd?	Department	Funding	Cost	Reliever
Kean, Mike	Period 2a	X 13BI _S4	FRASER, Oliver	Yes	48024		16.11	FO
Kean, Mike	Period 2b	X 13BI _S4	FRASER, Oliver	Yes	48024		16.11	FO
Kean, Mike	Period 3a	10MK SC _3	FRASER, Oliver	Yes	48024		16.11	FO
Kean, Mike	Period 3b	10MK SC _3	FRASER, Oliver	Yes	48024		16.11	FO
Kean, Mike	Period 4a	Y 10HO _S4	FRASER, Oliver	Yes	48024		16.11	FO
Kean, Mike	Period 4b	Y 10HO _S4	FRASER, Oliver	Yes	48024		16.11	FO
Kean, Mike	Period 5a	V 11SC _S4	FRASER, Oliver	Yes	48024		16.11	FO
Kean, Mike	Period 5b	V 11SC _S4	FRASER, Oliver	Yes	48024		16.11	FO

None
11010
11900

Illustration 11 : The selection of the 'Funding' entry.

While we are dealing with Mike it would be a convenient time to record his sick leave. At the right of his name at the top of the screen is a small button labelled 'Leave'. Click this and a leave details screen appears...

Illustration 12 : The leave details window

... via which the details of his leave can be recorded. These will subsequently appear on his personal leave details screen.

To cover for another absent staff member using staff members

Now select Dennis Davenport (Technical department). Notice by default, the previous reason for absence, Sick, has been repeated for Dennis. Change the reason if necessary.

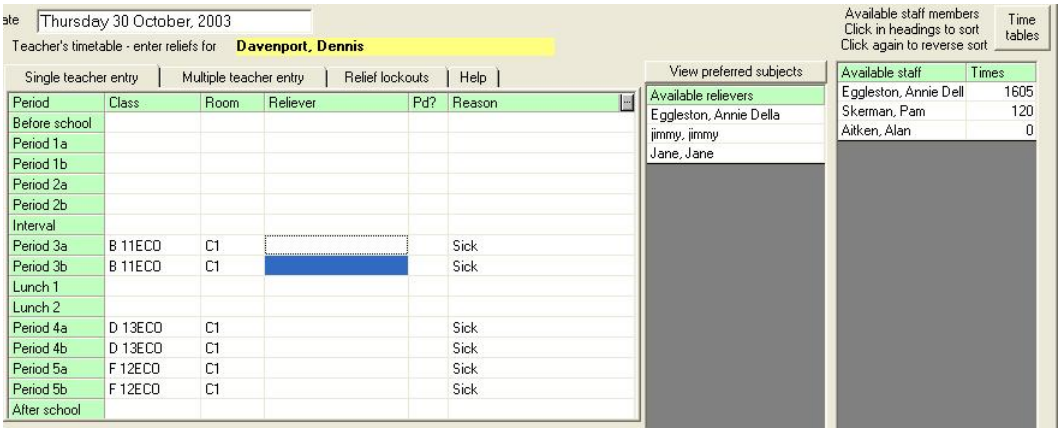


Illustration 12 : Selection of staff members to cover reliefs

Selected is period 3 and three staff members are available. (Actually, one of them is a reliever....) and Pam has already done 120 minutes of reliefs.... In the illustration above, I've selected the full period – both 3a and 3b. However, I've subsequently changed my mind and reselected just the first half of the period before selecting Alan to do the relief.

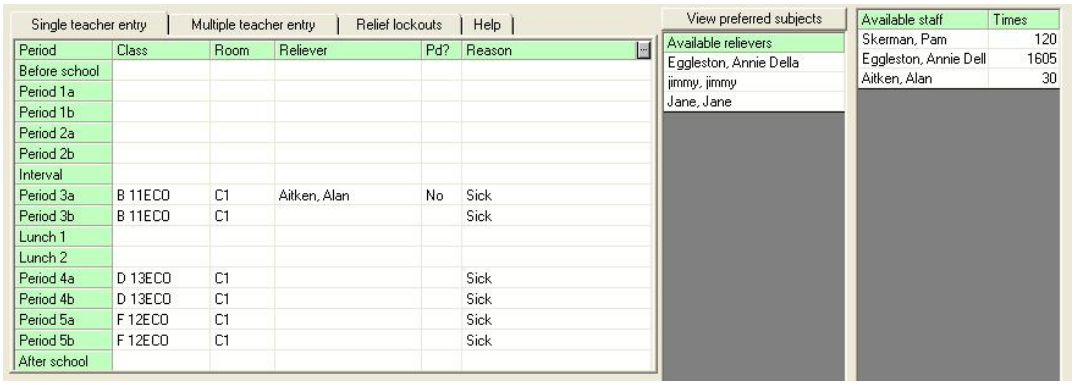


Illustration 12 : Selecting a staff member

... so I selected Alan. His total has gone up to 30 minutes.

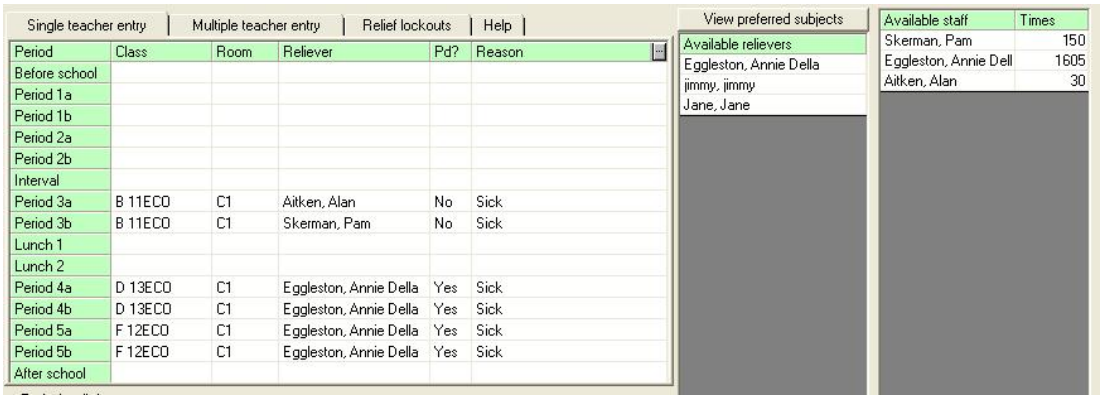


Illustration 13 : The completed selections

For the second half of the period I did select Pam, and her total has increased accordingly. I've also covered his other two periods using a reliever - Annie Eggleston.
To check the timetables of the available teachers click the small 'Time tables' button at the top right hand corner of the screen and their timetables slide out. Sure, enough, they are free in period three. Click the purple return bar to slide the timetables back again.

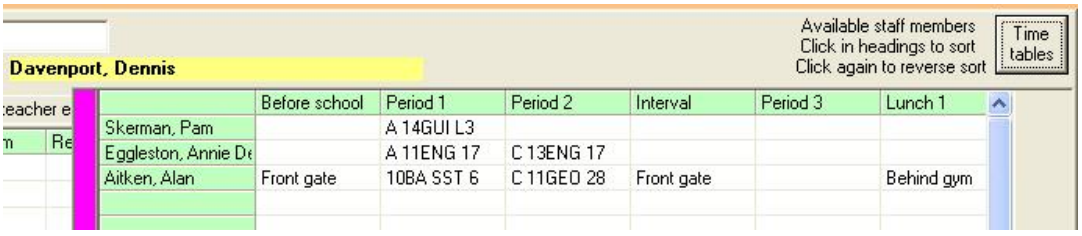


Illustration 14 : The timetables displayed

You'll note that Dennis was sick, by default. Once you've chosen one reason for absence this is attached to all subsequent staff members until you decide to change. This makes it easy if, e.g., several are away at a course.
Now, what have I forgotten? One or two other housekeeping matters....
If you right-click on a reliever's name in the upper relief schedule then you will be able to remove the relief via the message window which appears.

If a reliever who is to be paid ('Yes') for a relief is, in fact, to NOT be paid, then clicking in the upper window in the 'Paid' column provides a pull-down Yes/No menu which you can use to change its mind, thus :

Illustration 16 : Changing Paid.

In the top right corner, you can click in the 'Times' heading to have the listed sort in ascending or descending order of times spent doing reliefs. Your last setting will be remembered for future occasions. In other words, this enables those who have done the fewest reliefs to 'rise to the top' of the list.

Illustration 17 : Sorting the least used staff members to the top.

Finally, in the bottom right corner of the screen, by now glowing incandescently, is the 'Save changes' button. Once you click this button your arranged reliefs are sent to the database (and, if you are at home, to a text file which may be returned to school - more on that later).

Illustration 18 : The ‘Save changes’ button is red when there’s something to save

You can, of course, return to this date at any time and alter or arrange further reliefs. Clicking on the 'Save changes' button will replace, in the database, all reliefs for the nominated date with the currently displayed bunch.

Right, that's the gist of it. Let's turn now to the second entry method, whereby you may view more than one absent teacher at a time.

9.3 Multiple teacher entry mode

Click on the second tab at the centre top of the screen - Multiple teacher entry.

The screen changes its format, in an attempt to maximise the area available for the main relief entry grid. The list of relievers has been moved to down below the main relief grid which has been widened to use the room made available.

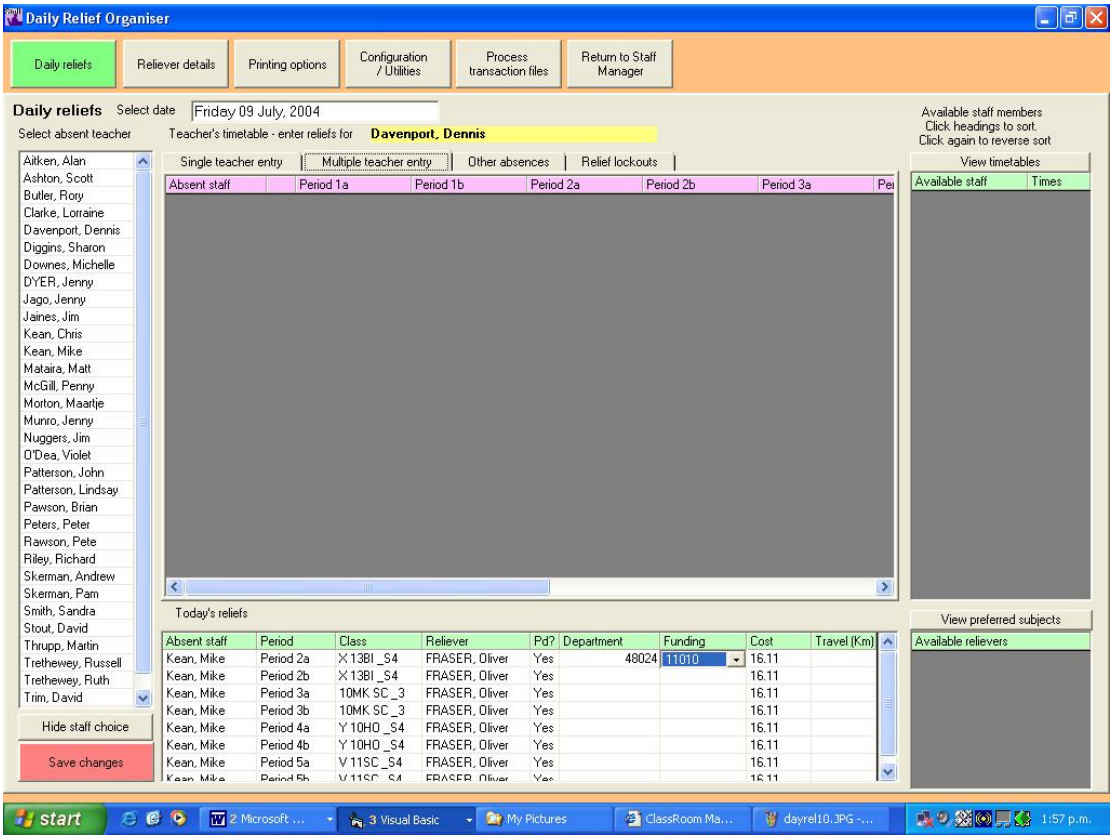


Illustration 19 : The multiple entry of reliefs

The major difference is the data entry grid. In the example below I've clicked on Mike, one of the absent teachers from the earlier example and I've also selected Peter Peters, Andrew Skerman and David Stout. For the purpose of the demonstration I've also removed the duty time slots from the display. Some will notice that the data displayed is not that which was entered above. This is because some screens were recaptured due to changes in the screen layout.
You can see all four teachers listed, with reliefs already in place for Mike.

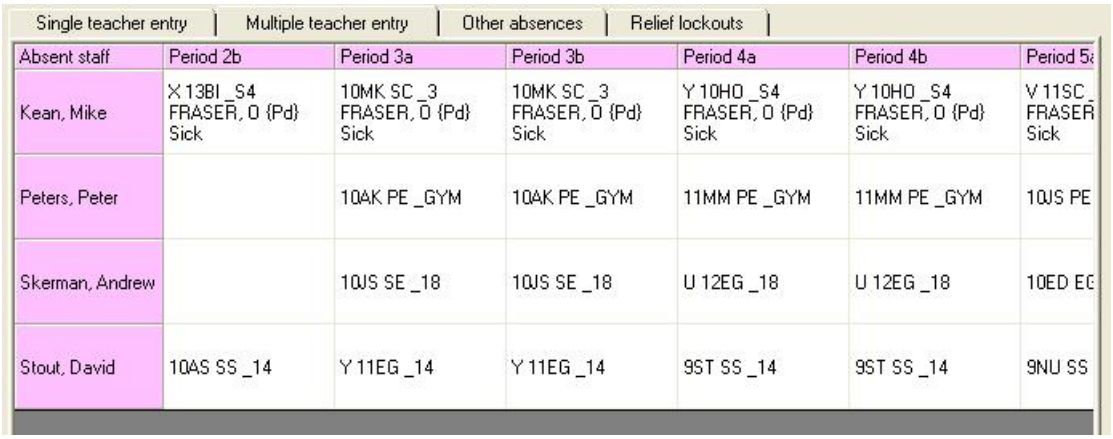


Illustration 20 : Multiple entry of reliefs

I now wish to add some reliefs, so I'll select the cells contacting those concerned. I've selected four cells....

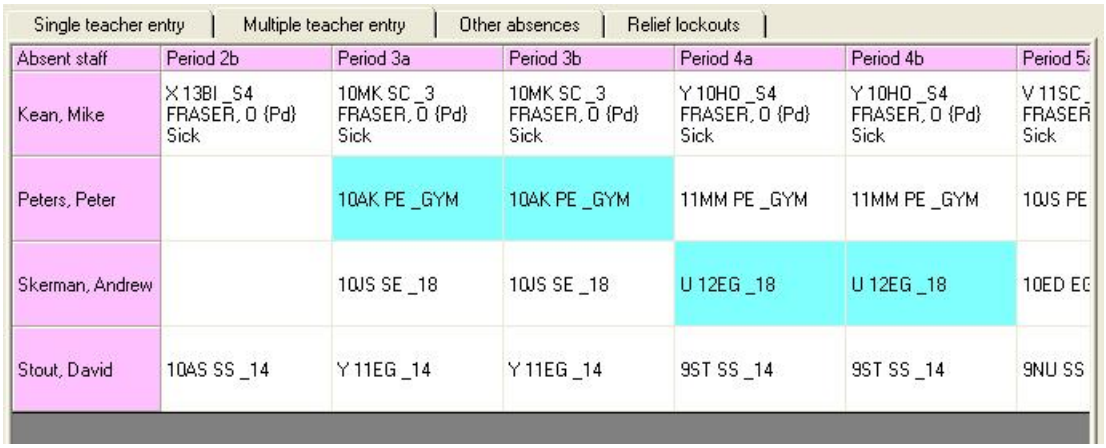


Illustration 21 : Four cells selected

... and, in the available relievers window, I can see that I have four relievers available. It's Annie Egglestone's turn, so I'll select her...

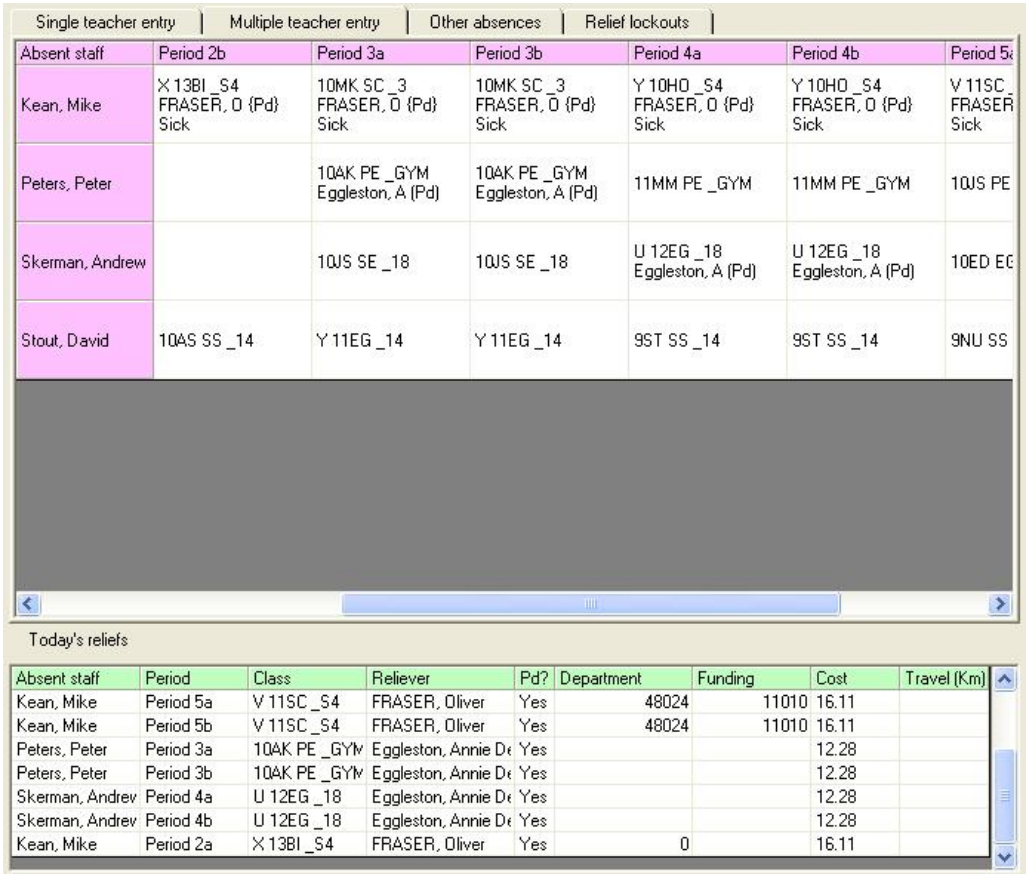


Illustration 22 : Four reliefs have been allocated.

.. and she is now attached to those cells, with (Pd) as she is a reliever.
To enter the reason for the relief, right-click in the name of the absent teacher, and a small window appears, from which I can select the reason for that teacher.

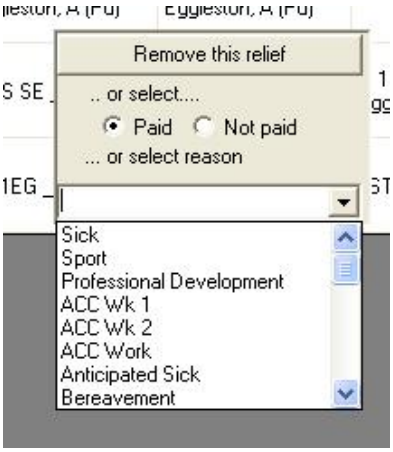
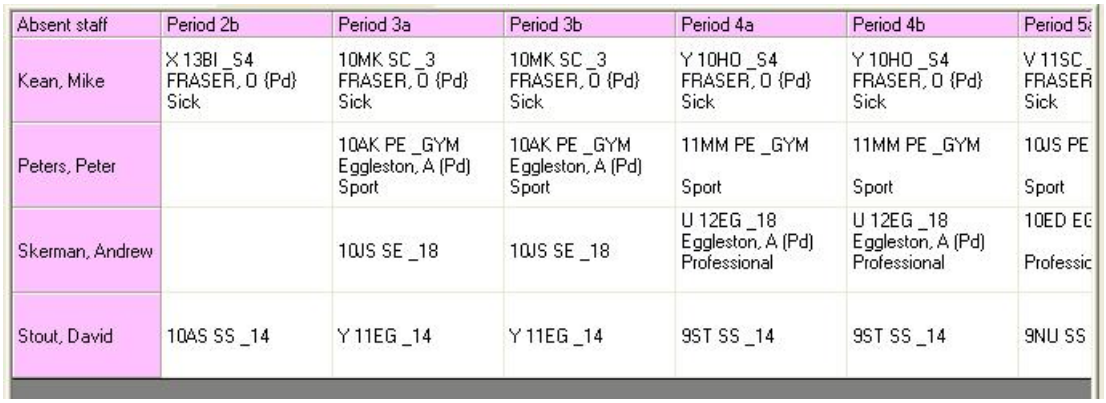


Illustration 23 : Selection of a reason

Next do the same for the others, selecting their reasons for absence.



Absent staff	Period 2b	Period 3a	Period 3b	Period 4a	Period 4b	Period 5
Kean, Mike	X 13BI _S4 FRASER, O {Pd} Sick	10MK SC _3 FRASER, O {Pd} Sick	10MK SC _3 FRASER, O {Pd} Sick	Y 10HO _S4 FRASER, O {Pd} Sick	Y 10HO _S4 FRASER, O {Pd} Sick	V 11SC _ FRASER Sick
Peters, Peter		10AK PE _GYM Eggleston, A {Pd} Sport	10AK PE _GYM Eggleston, A {Pd} Sport	11MM PE _GYM Sport	11MM PE _GYM Sport	10JS PE Sport
Skerman, Andrew		10JS SE _18	10JS SE _18	U 12EG _18 Eggleston, A {Pd} Professional	U 12EG _18 Eggleston, A {Pd} Professional	10ED EG Professic
Stout, David	10AS SS _14	Y 11EG _14	Y 11EG _14	9ST SS _14	9ST SS _14	9NU SS

Illustration 24 : The reasons in place

Finally, remove the (Pd) flag from one cell. Right-click in the cell and a small window appears, enabling me to either remove the relief itself, change the paid status, or select a reason for that cell.

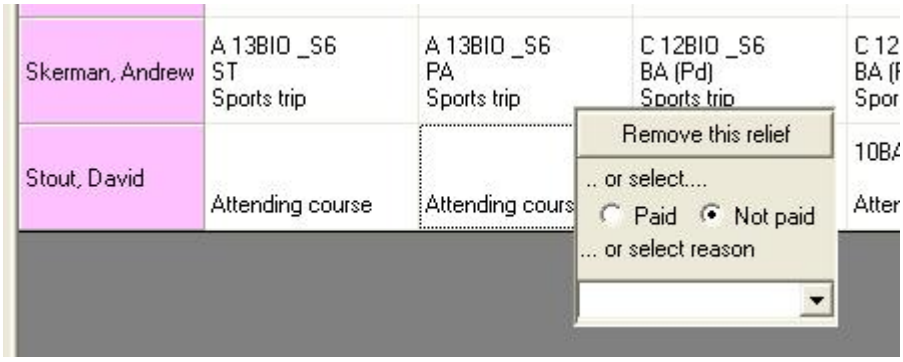


Illustration 25 : The adjustment of 'Paid'

This completes the demonstration of the second method of arranging reliefs, the Multi-teacher method. A recent change has been to show the full name of the reliever in each cell.

There are two more tabs on this screen before turning out attention to the utilities and printing options.

9.4 Other absences

From time to time staff members may be absent, or unavailable, but not require day relief. It may be, for example, that the Deputy Principal is involved in investigative activity which takes her away from the school for part or all of the day. She wishes to have her absence recorded and to appear on the list of absentees for the day, even though she does not require a reliever during that time.

The third tab allows you to record such absences. On the screen below, the third tab ('Other absences') has been selected and three staff members have been selected from the staff list.

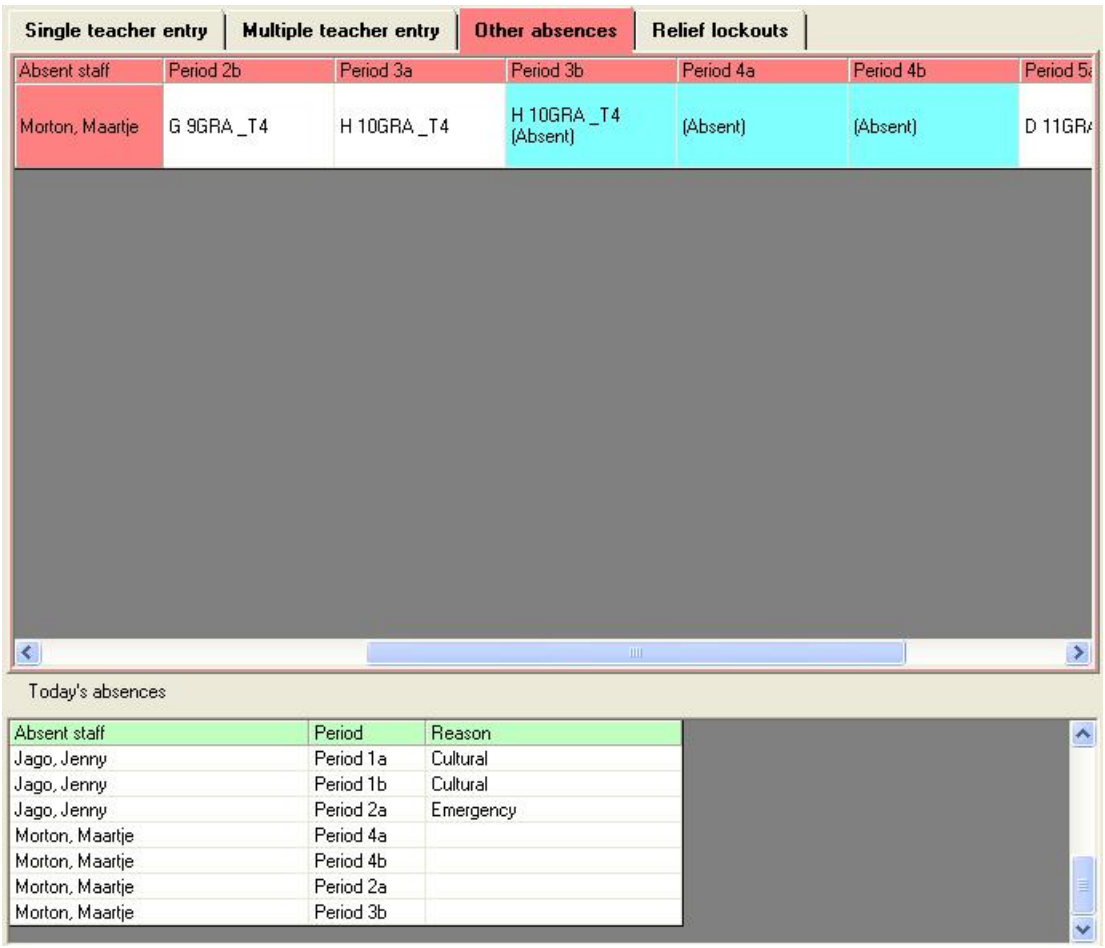


Illustration 26 : The 'Other absences' tab

In the illustration above, one teachers timetable is displayed. Maartje has been clicked as absent during the second half of period three (during which time she has a class which does NOT require a relief cover – perhaps she has taken them up down to visit a factory) and she is also absent during period four (when she does not have a class, and hence does not require a relief).

All that remains is to select the reason for the absences in the same manner as that used for relief above, as shown below.

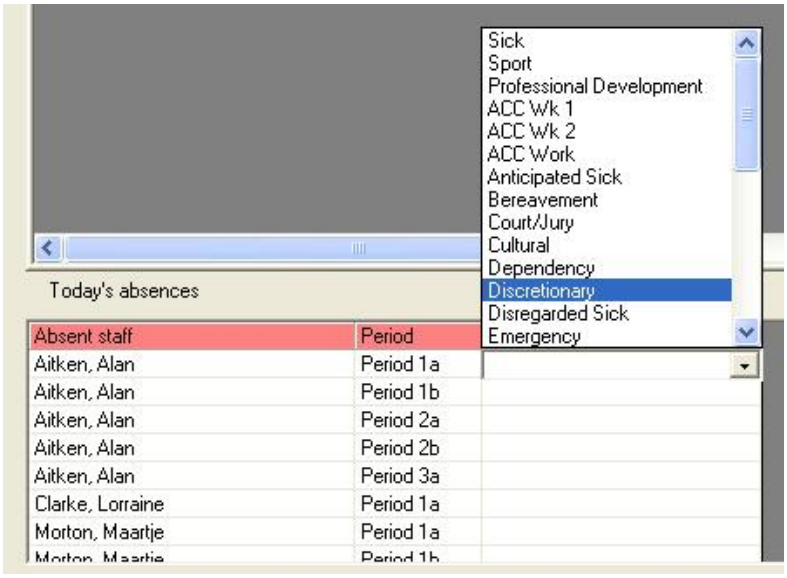


Illustration 27 : The reason for the absences is selected

If a teacher has been marked absent (and does not require a relief) then such absences will be shown on the multi-teacher display as shown below, with the word '(Absent') indicating that their non-presence has been recorded. You can select such periods and allocate relievers to them, overwriting the 'Absence' record, in the usual way.

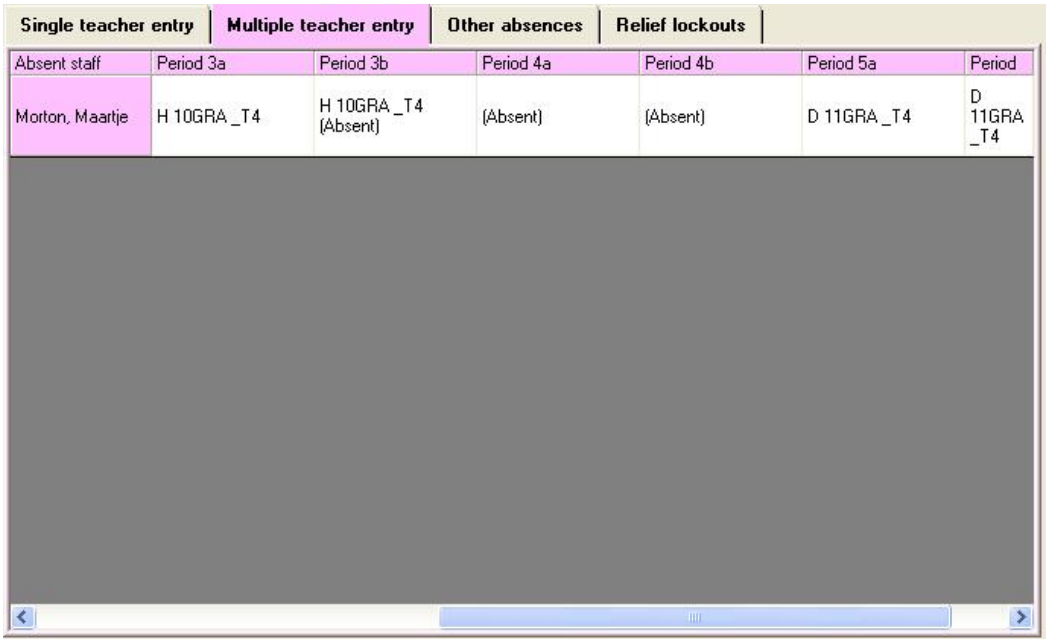


Illustration 28 : Absences appearing on the reliefs grid

9.5 Relief lockouts

The third tab at the top of the screen is titled 'Relief lockouts'.

This is where you can inform the program that a teacher or a reliever is not available on certain times or days.

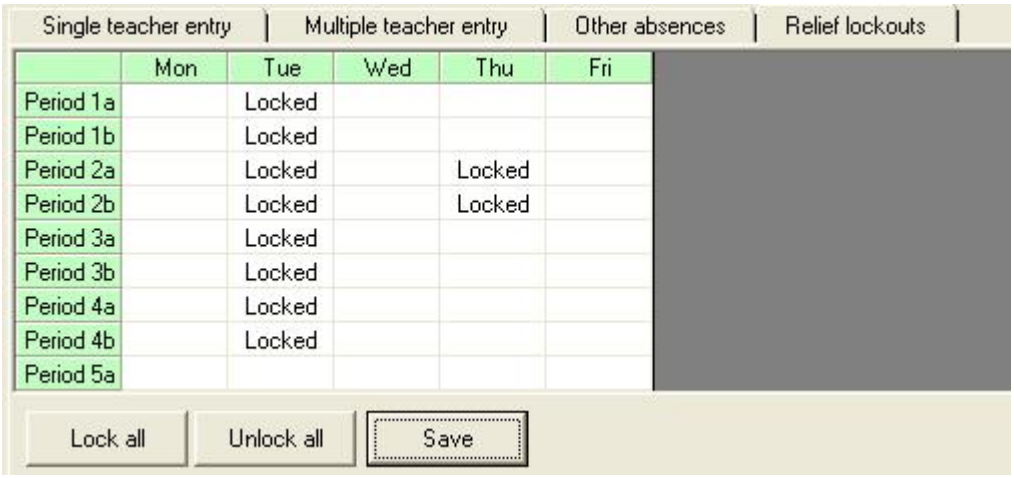


Illustration 29 : Several periods locked out

In the example below the teacher concerned is not available for reliefs in the locked times.

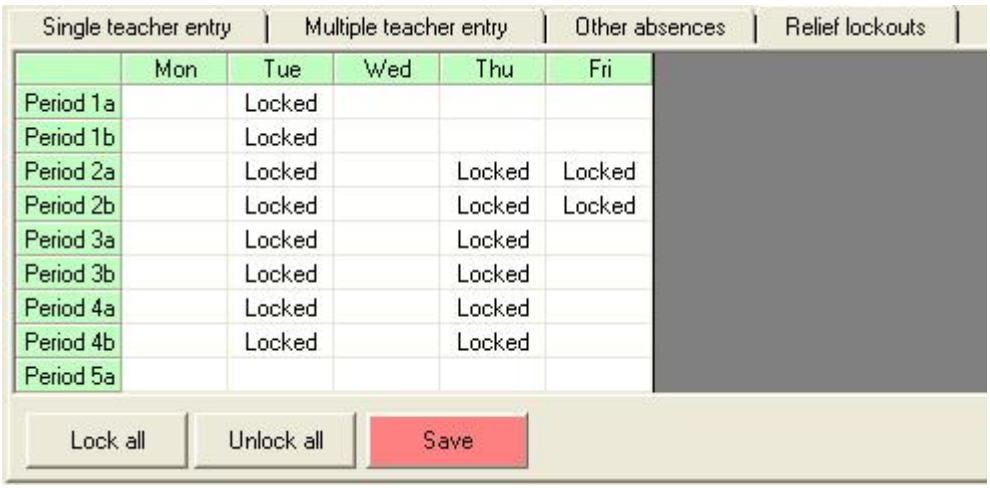


Illustration 30 : Adjusted lockouts

I've added three more locked time slots, and the 'Save' button is now red, warning me to save the changes.
Now we move to the other large buttons at the top of the Daily relief screen.

Absent class

Free staff

9.6 Reliever details

This button takes you to two screens which allow you to update relevant information relating to just the relievers. This information is also available via the main editing screens but its also available here.

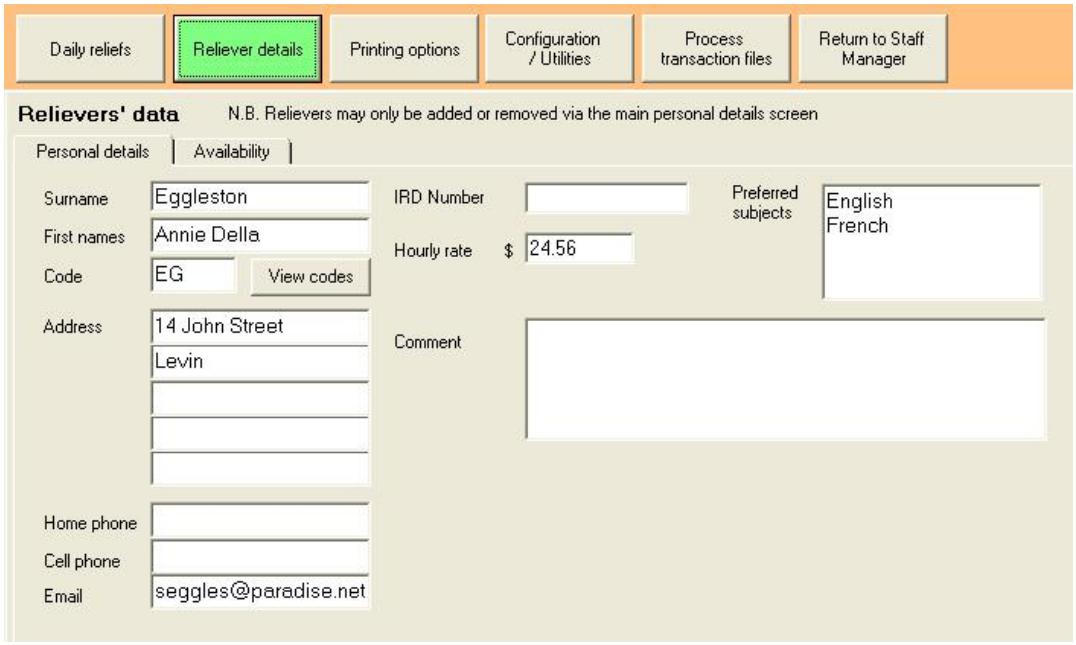


Illustration 31 : The relievers' details screen

The first tab has basic information, including their hourly rate, their email address and their preferred subjects.
(Hmmm, I could make the email address a little wider perhaps....)

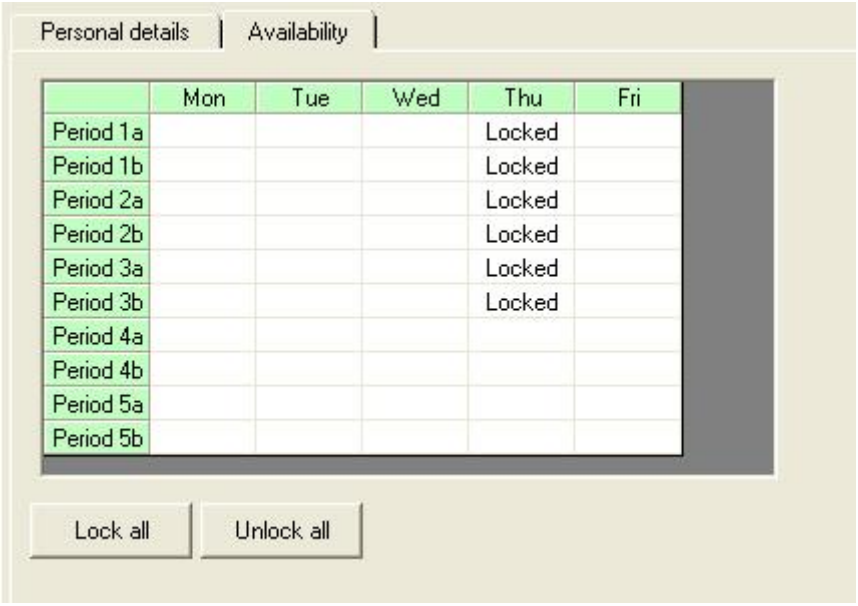


Illustration 32 : The reliever is unavailable in selected periods

The second tab provides access to relievers availability - the time slots in which they are locked out.
At the bottom of this screen are Search, Save, Back and Next buttons..

9.7 Configuration / Utilities

This button reveals a number of others each related to configuration processes and utilities. These include :
Daily Relief

Configuration
Days and times, Timetable links, Default settings, Funding departments
Utilities
Erase last year's reliefs, Access web sites, Relief transactions, Working at home

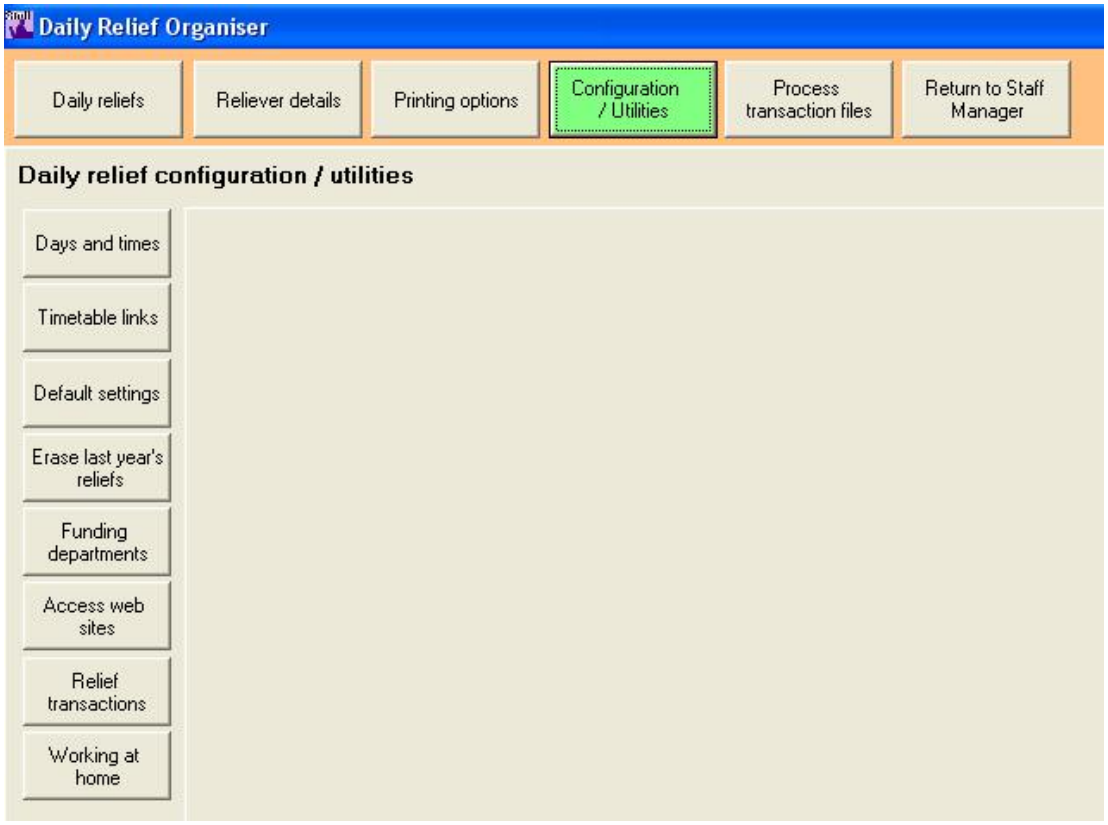


Illustration 34 : The Configuration and utilities screen

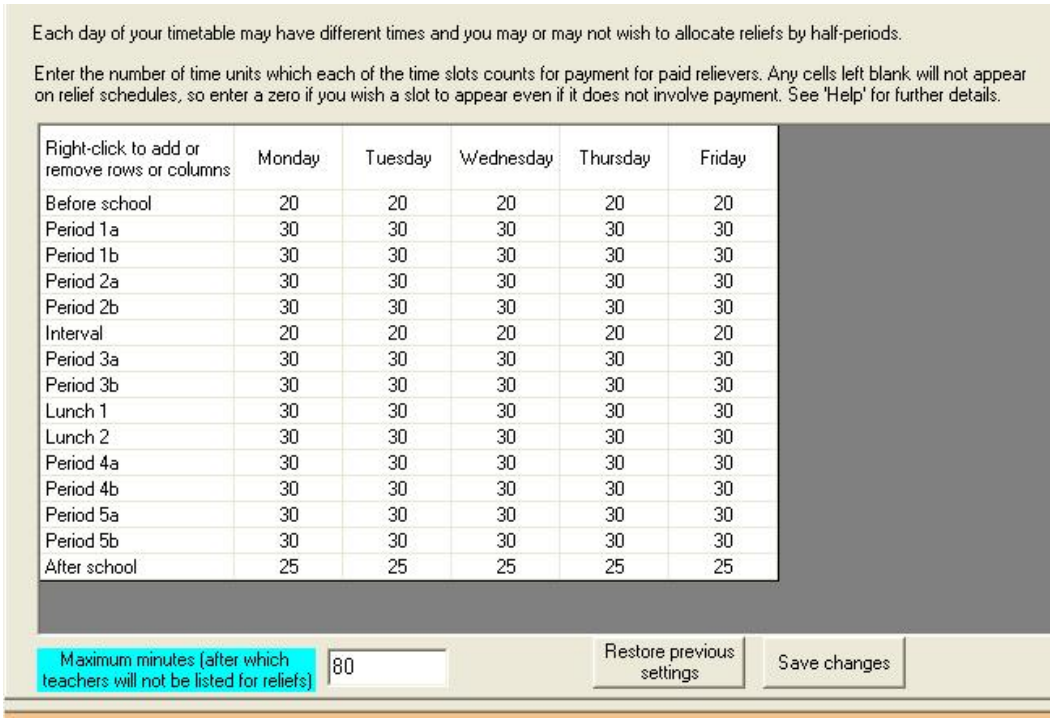


Illustration 35 : Specifying days and times

Timetable links

This is a screen you have met before. It allows you to specify the location and name of the timetable file to which you wish to link. Alternatively, if you are not using MUSAC Timetable Assistant then you scan specify the number of days and periods per day which you are using.

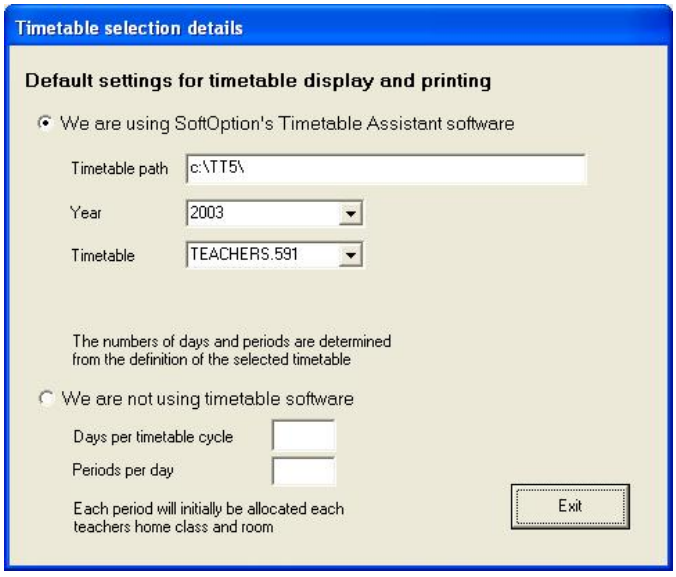


Illustration 36 : Timetable links or settings

Display Options

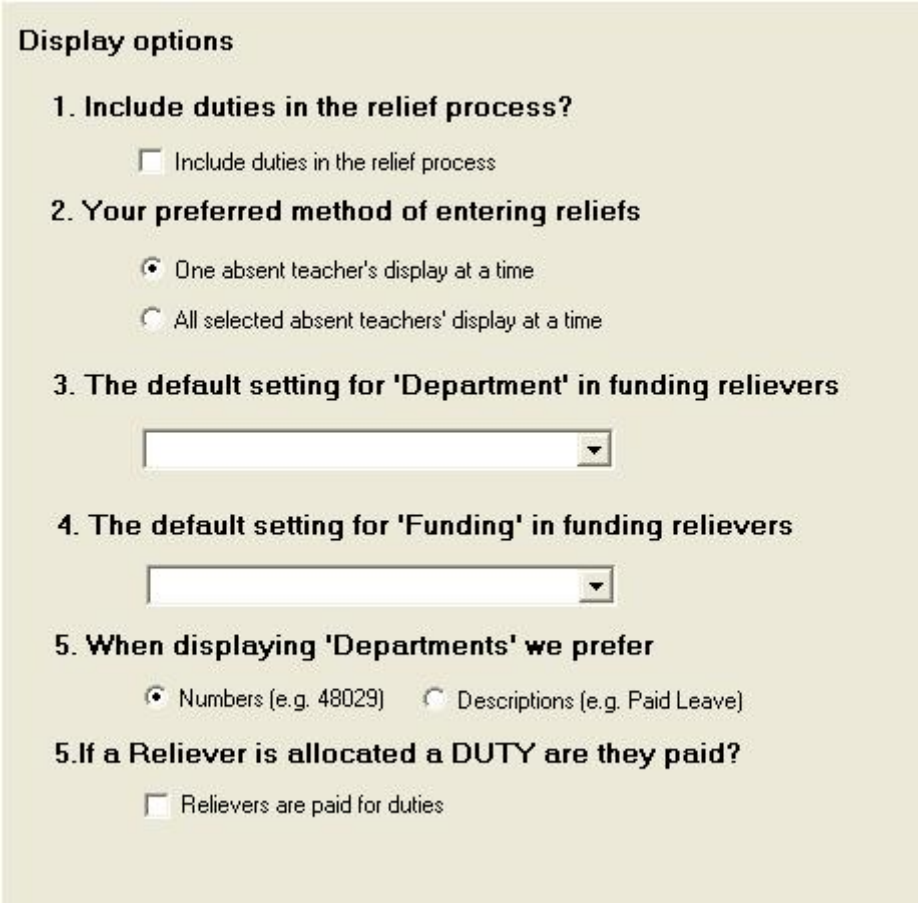


Illustration 37 : The default settings for Day Relief

You may elect to include or exclude duties in or from the daily relief process.
You may also specify your preferred method of data entry - whether you prefer the single teacher mode or the multi-teacher mode. Whichever you select will appear as the default method whenever you enter the daily relief area.
You can specify the default settings for both Department and Funding
In selecting the department you can use either the department names or their numeric codes, as shown on the screen above.
You can choose whether or not duties are paid.

Removal of a year's reliefs

At this stage of development of the package you may, early in the new year, use this process to remove all of the reliefs allocated during the previous year. This does, of course, set the times spent in relief by each staff member back to zero.

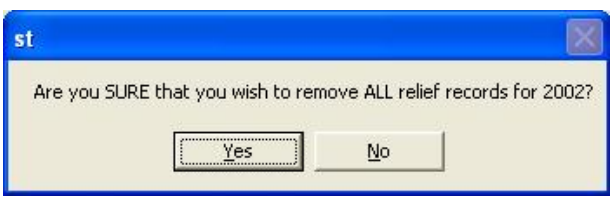


Illustration 38 : The choice concerning last year's reliefs

Funding departments

Pay Serve allow you to add further Departments of your own for submission to their payroll processes. The screen below allows you to specify your own, which will then be added to the standard ones offered. Before arriving at the screen, the following message is displayed, informing you of the process.

Illustration 39 : Adding new departments

When you add the new department you must also supply a suitable 5-digit code, as shown below.

Illustration 40 : A new department with its code

Relief budget details

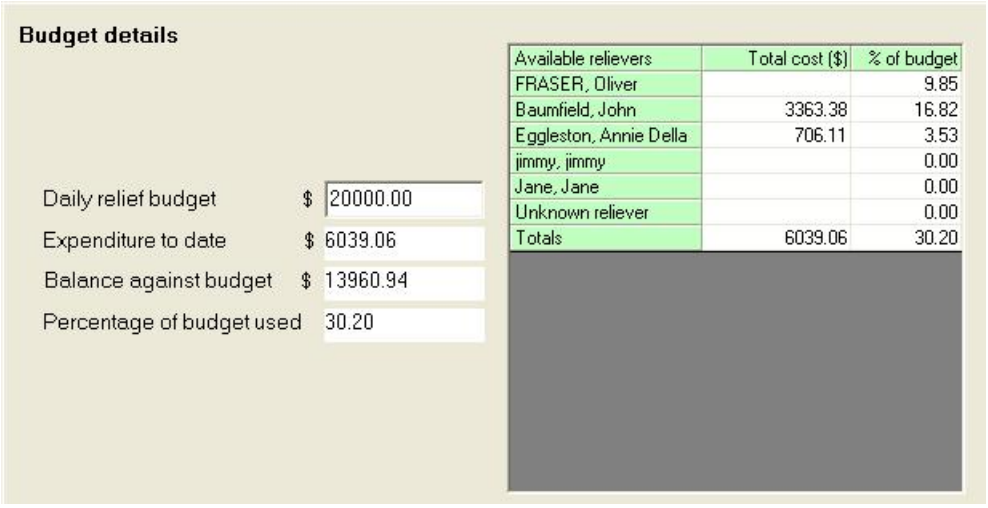


Illustration 41 : The budget balance

In this area you can set the global budget for daily reliefs and monitor progress both against the total and against individual relievers.

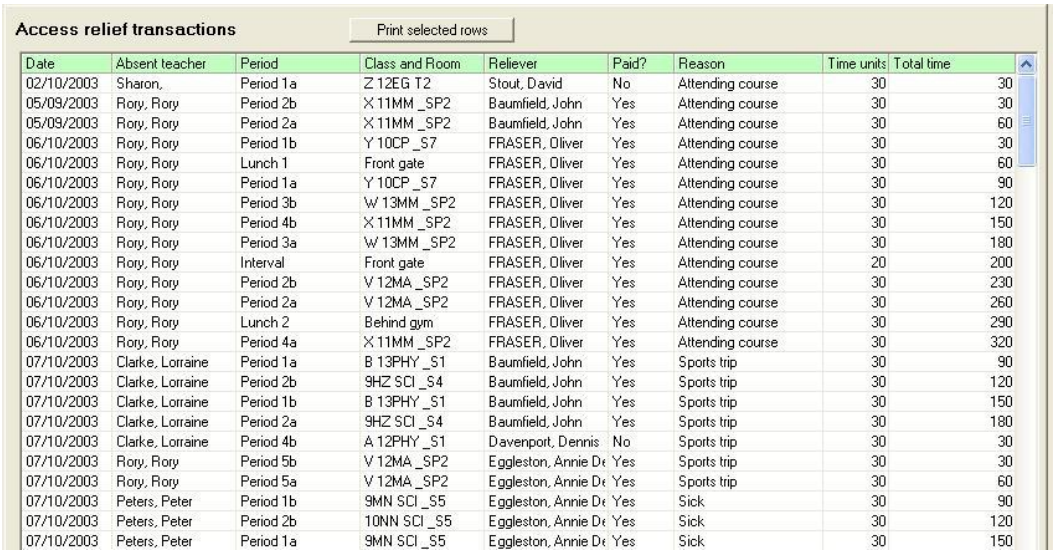
Access web sites

Also, provided you are currently online, you may access the displayed websites directly by clicking on the logos associated with each, including MUSAC (of course).

Illustration 42 : Accessing relevant websites

Relief transactions

The purpose of this utility is to allow you to view all relief transactions, and to sort them and to print selections from the list.


Access relief transactions — Print selected rows

Date	Absent teacher	Period	Class and Room	Reliever	Paid?	Reason	Time units	Total time
02/10/2003	Sharon,	Period 1a	Z 12EG T2	Stout, David	No	Attending course	30	30
05/09/2003	Rory, Rory	Period 2b	X 11MM _SP2	Baumfield, John	Yes	Attending course	30	30
05/09/2003	Rory, Rory	Period 2a	X 11MM _SP2	Baumfield, John	Yes	Attending course	30	60
06/10/2003	Rory, Rory	Period 1b	Y 10CP _S7	FRASER, Oliver	Yes	Attending course	30	30
06/10/2003	Rory, Rory	Lunch 1	Front gate	FRASER, Oliver	Yes	Attending course	30	60
06/10/2003	Rory, Rory	Period 1a	Y 10CP _S7	FRASER, Oliver	Yes	Attending course	30	90
06/10/2003	Rory, Rory	Period 3b	W 13MM _SP2	FRASER, Oliver	Yes	Attending course	30	120
06/10/2003	Rory, Rory	Period 4b	X 11MM _SP2	FRASER, Oliver	Yes	Attending course	30	150
06/10/2003	Rory, Rory	Period 3a	W 13MM _SP2	FRASER, Oliver	Yes	Attending course	30	180
06/10/2003	Rory, Rory	Interval	Front gate	FRASER, Oliver	Yes	Attending course	20	200
06/10/2003	Rory, Rory	Period 2b	V 12MA _SP2	FRASER, Oliver	Yes	Attending course	30	230
06/10/2003	Rory, Rory	Period 2a	V 12MA _SP2	FRASER, Oliver	Yes	Attending course	30	260
06/10/2003	Rory, Rory	Lunch 2	Behind gym	FRASER, Oliver	Yes	Attending course	30	290
06/10/2003	Rory, Rory	Period 4a	X 11MM _SP2	FRASER, Oliver	Yes	Attending course	30	320
07/10/2003	Clarke, Lorraine	Period 1a	B 13PHY _S1	Baumfield, John	Yes	Sports trip	30	90
07/10/2003	Clarke, Lorraine	Period 2b	9HZ SCI _S4	Baumfield, John	Yes	Sports trip	30	120
07/10/2003	Clarke, Lorraine	Period 1b	B 13PHY _S1	Baumfield, John	Yes	Sports trip	30	150
07/10/2003	Clarke, Lorraine	Period 2a	9HZ SCI _S4	Baumfield, John	Yes	Sports trip	30	180
07/10/2003	Clarke, Lorraine	Period 4b	A 12PHY _S1	Davenport, Dennis	No	Sports trip	30	30
07/10/2003	Rory, Rory	Period 5b	V 12MA _SP2	Eggleston, Annie De	Yes	Sports trip	30	30
07/10/2003	Rory, Rory	Period 5a	V 12MA _SP2	Eggleston, Annie De	Yes	Sports trip	30	60
07/10/2003	Peters, Peter	Period 1b	9MN SCI _S5	Eggleston, Annie De	Yes	Sick	30	90
07/10/2003	Peters, Peter	Period 2b	10NN SCI _S5	Eggleston, Annie De	Yes	Sick	30	120
07/10/2003	Peters, Peter	Period 1a	9MN SCI _S5	Eggleston, Annie De	Yes	Sick	30	150

Illustration 43 : The year's relief transactions

This screen allows you to see all of the relief transactions for the current year. You can sort on any of the column headings by clicking on the relevant heading. You can also select a number of rows by holding down Ctrl and clicking in the requested rows. Alternatively, select one row then hold down the shift key and click a second row to select all those in between. Once rows have been selected you can print them using the button at the top of the display.

Working at home

This is where you signal to the package that you are working at home. Click the button at the top of the screen. This will cause separate transaction files to be created for each day that you create reliefs.

Then, using the steps at the bottom of the screen, you can select the required files and have them sent back to school, ready for inclusion in the school's relief database.

You have three possibilities.

1. You can email the file(s) to yourself at school
2. You can copy them from your laptop via the network while it is plugged in
3. You can have them copied to a pen drive ready for transport back to school.

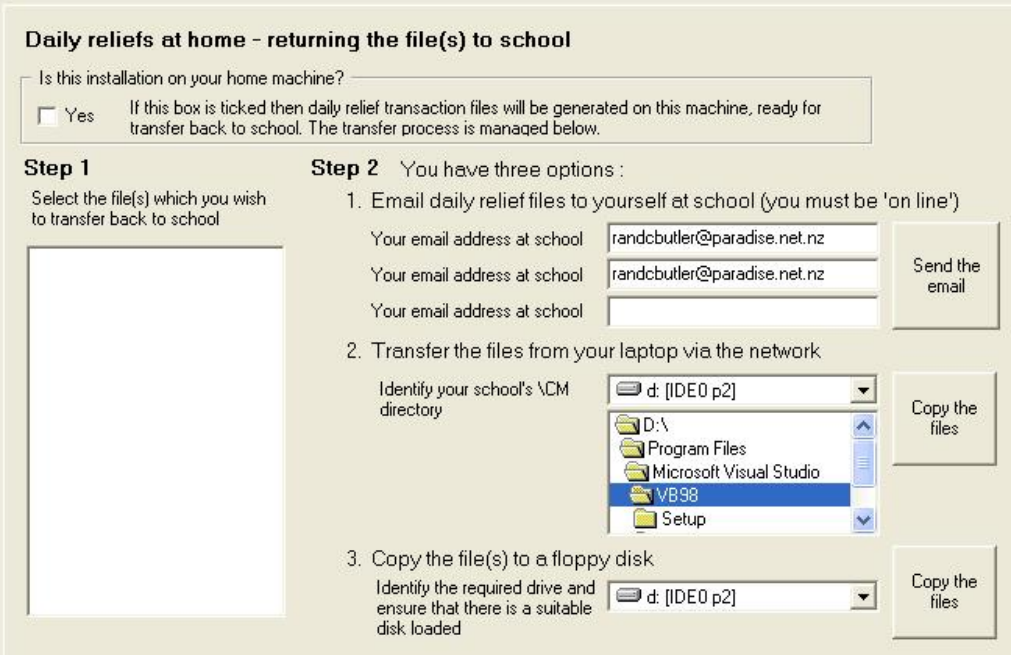


Illustration 44 : The 'Working at home' screen

The files can be processed back at school using the button titled 'Process transaction files' discussed fully further below.

12 Printing Options

There are several printing possibilities associated with daily reliefs.

Firstly, for any of these options, you must specify the date. This date is NOT automatically copied from the Daily Relief date. It is identified separately.

Reliever' Notifications

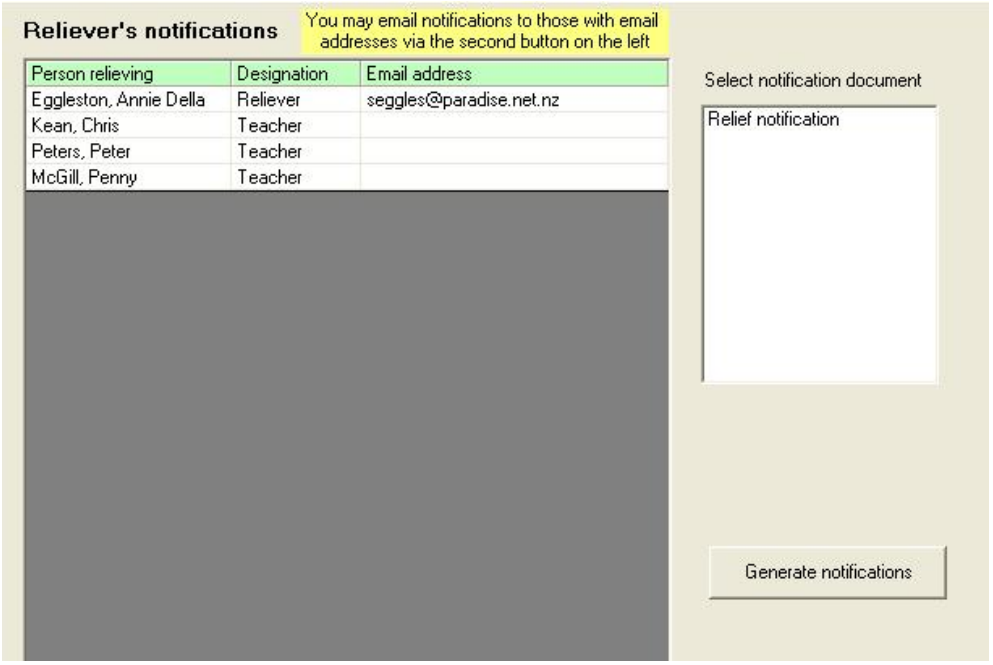


Illustration 46 : Printing relievers' notifications

This process allows you to print a document providing each reliever (or teacher) with details of their (upcoming) reliefs. All relievers for whom reliefs are held for the nominated date, along with their email address, are listed on the left hand side of the screen. The email addresses are listed because you can email these notices to the relievers using the second printing option - and this screen simply alerts you to the fact that some may not have email addresses specified.
You need not select relievers from this list for printing, and they will all be printed. (You can print selected ones later on in the printing process).
You DO need to select the required document. One document (see below) has been designed for you and comes with the package. Its title is 'Relief notification.
This document was designed using the Word Processor out on the main printing utility. A screen capture of the design process is shown below. You should visit this area to adjust your school name to something other than 'Our school name'!

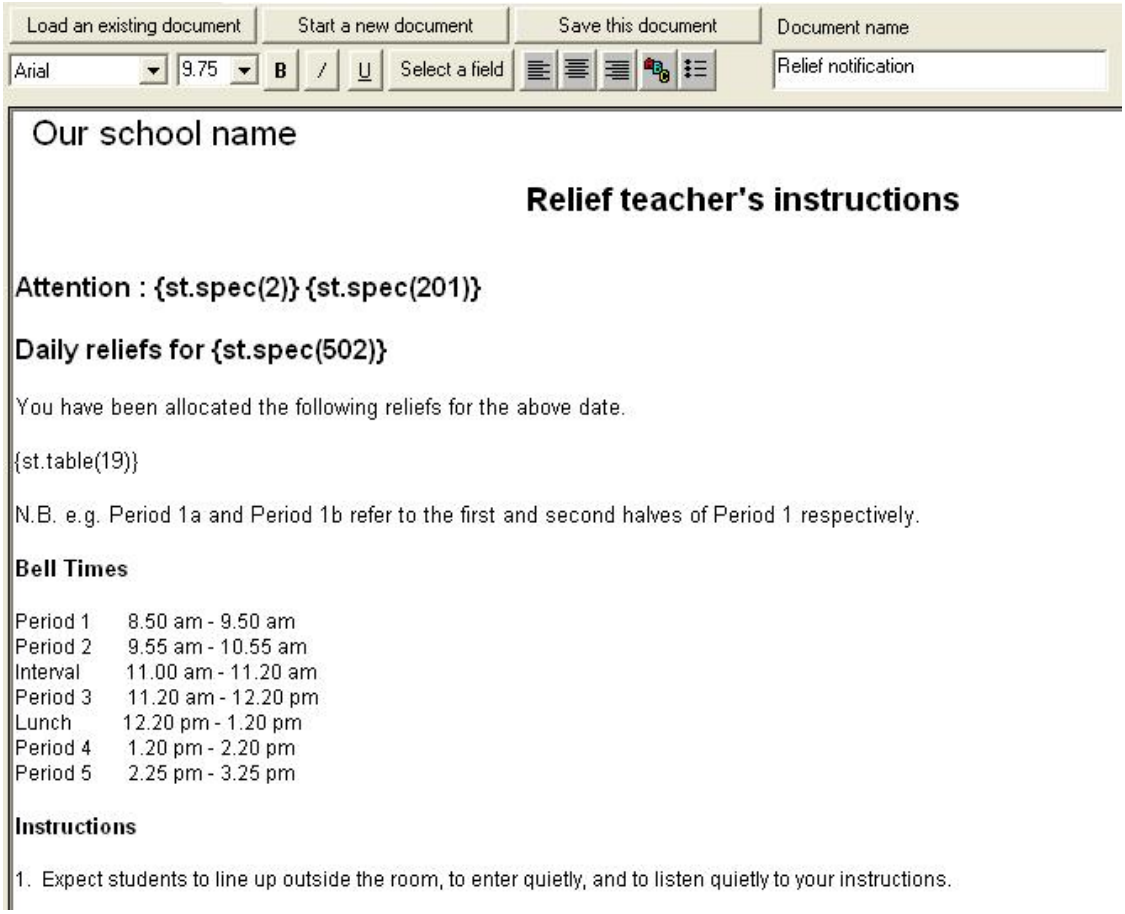


Illustration 47 : The design of the reliever notification document

Now that the document has been selected, click on the 'Generate notifications' button.

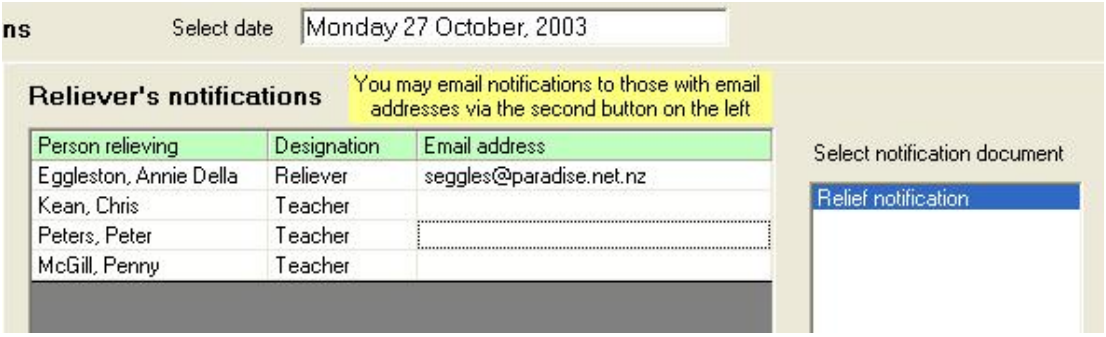
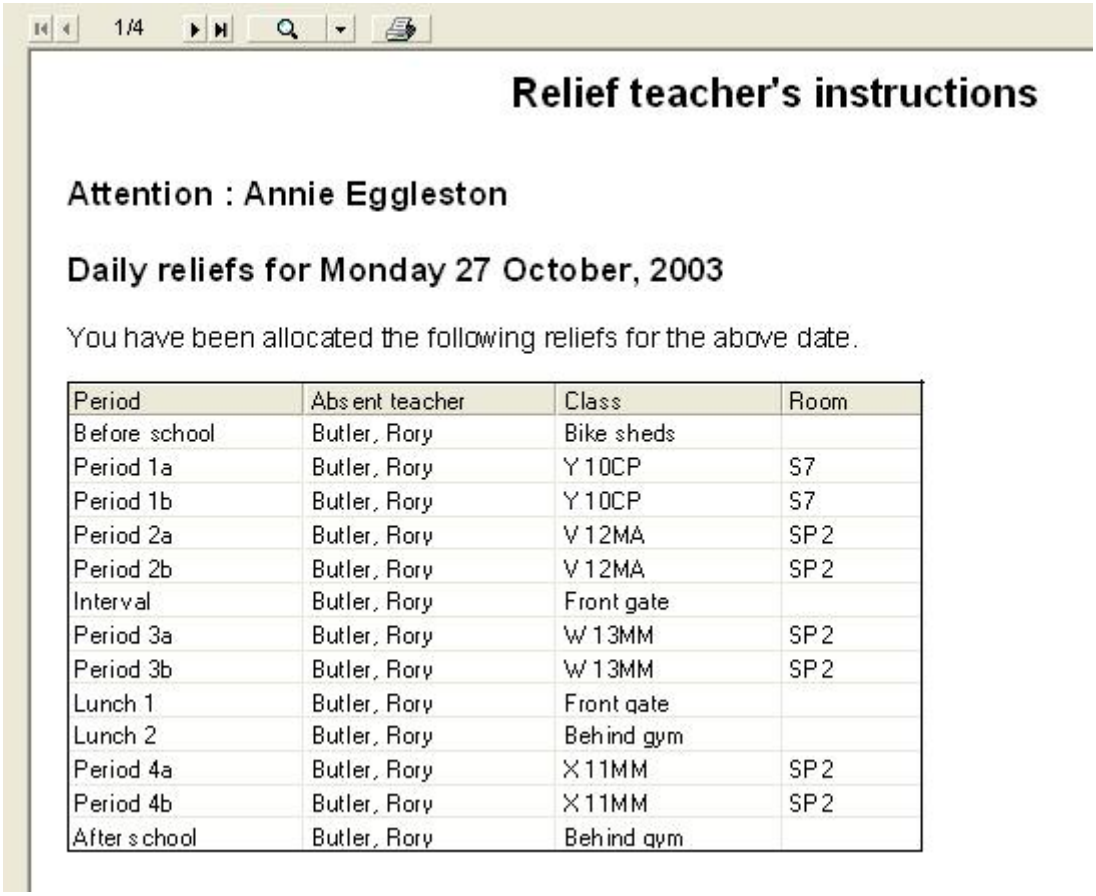


Illustration 48 : Selection of the required document

The results will be displayed in the preview screen as shown below.



Period	Absent teacher	Class	Room
Before school	Butler, Rory	Bike sheds	
Period 1a	Butler, Rory	Y10CP	S7
Period 1b	Butler, Rory	Y10CP	S7
Period 2a	Butler, Rory	V12MA	SP2
Period 2b	Butler, Rory	V12MA	SP2
Interval	Butler, Rory	Front gate	
Period 3a	Butler, Rory	W13MM	SP2
Period 3b	Butler, Rory	W13MM	SP2
Lunch 1	Butler, Rory	Front gate	
Lunch 2	Butler, Rory	Behind gym	
Period 4a	Butler, Rory	X11MM	SP2
Period 4b	Butler, Rory	X11MM	SP2
After school	Butler, Rory	Behind gym	

Illustration 49 : A reliever's notification previewed

Email relievers' notifications

The second button allows you to email notifications to those relievers for whom email addresses have been entered. The screen, with its eight steps, is shown below.

What is happening on this screen?

Firstly, only those relievers and/or teachers for whom reliefs have been specified for the requested date AND who have email addresses are listed on the left hand side. You DO need to select those to whom you wish to send emails. Use the 'Select all' button at the bottom of the screen

In step 3 you must decide whether or not you wish to attach the relief notification (as printed in the previous process). The previous process included a rather nice table in the middle of the document. Unfortunately, I have not been able to discover how to include a table in an email message, so you have two alternatives.

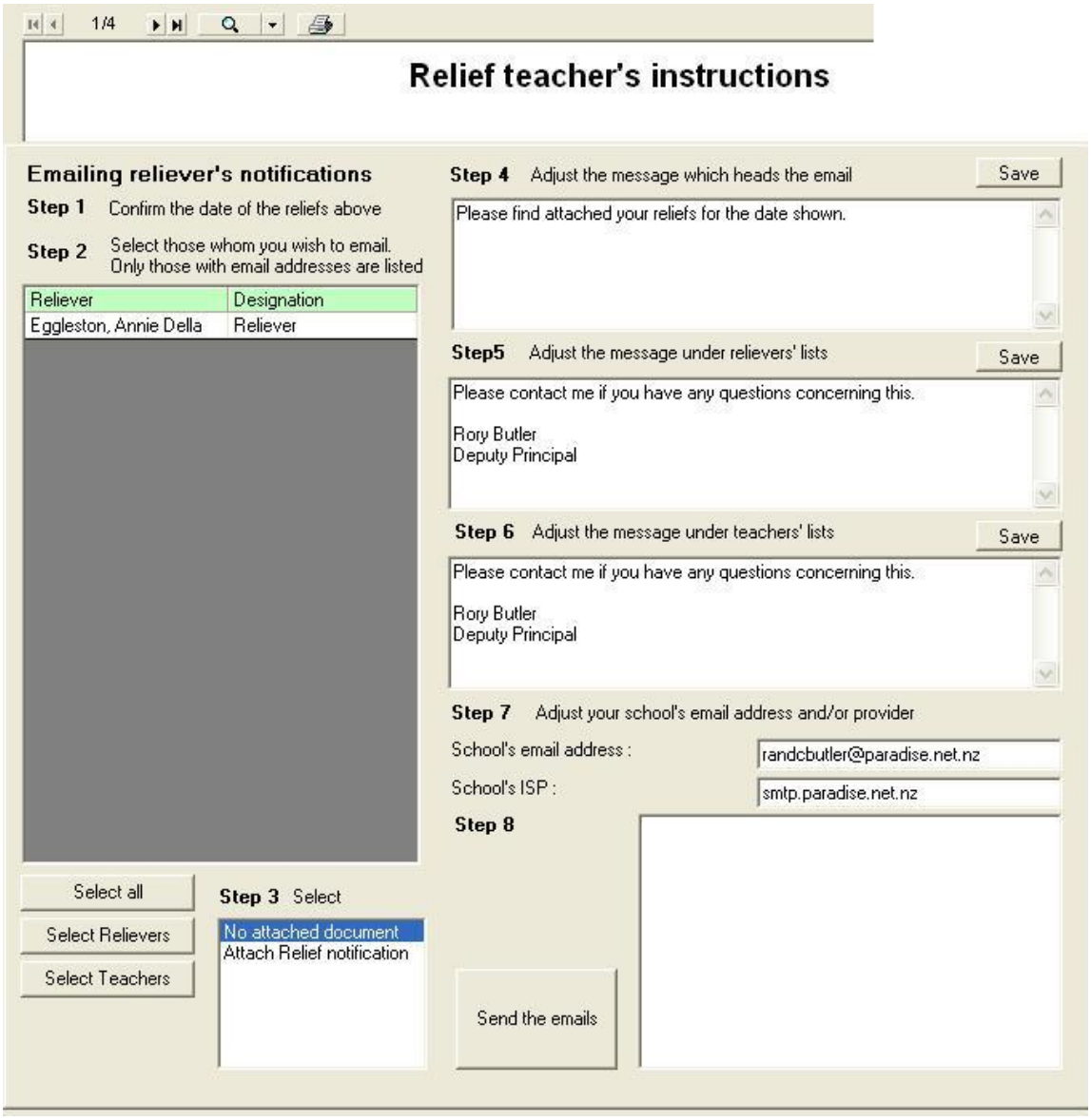


Illustration 50 : Emailing relievers' notification documents

Either you can select 'No attached document', in which case a 'text-type' list of the reliefs will be included in the email message or you can select 'Attach relief notification', in which case the document itself will be generated and supplied as an attachment to the email.
Now we are up to step 4 on the screen above. In step 4 you can type a note which will appear at the top of the email message. This will, of course, be memorised and returned for you each time you visit this area.
Steps 5 and 6 allow you to write a note which will appear AFTER the relief details. A different message can be provided for relievers and teachers.
In step 7 you must check your school's email address and school's provider's address.
In step 8, the emails will be sent. Unfortunately, it has not (currently) been possible to have the sending of these messages recognised in the 'Sent' box of your email software.

Absentee notifications

The next two processes are extremely similar to those for reliever notifications, except that these are directed at the absent teachers for whom reliefs have been arranged. The screen for this process is shown below.

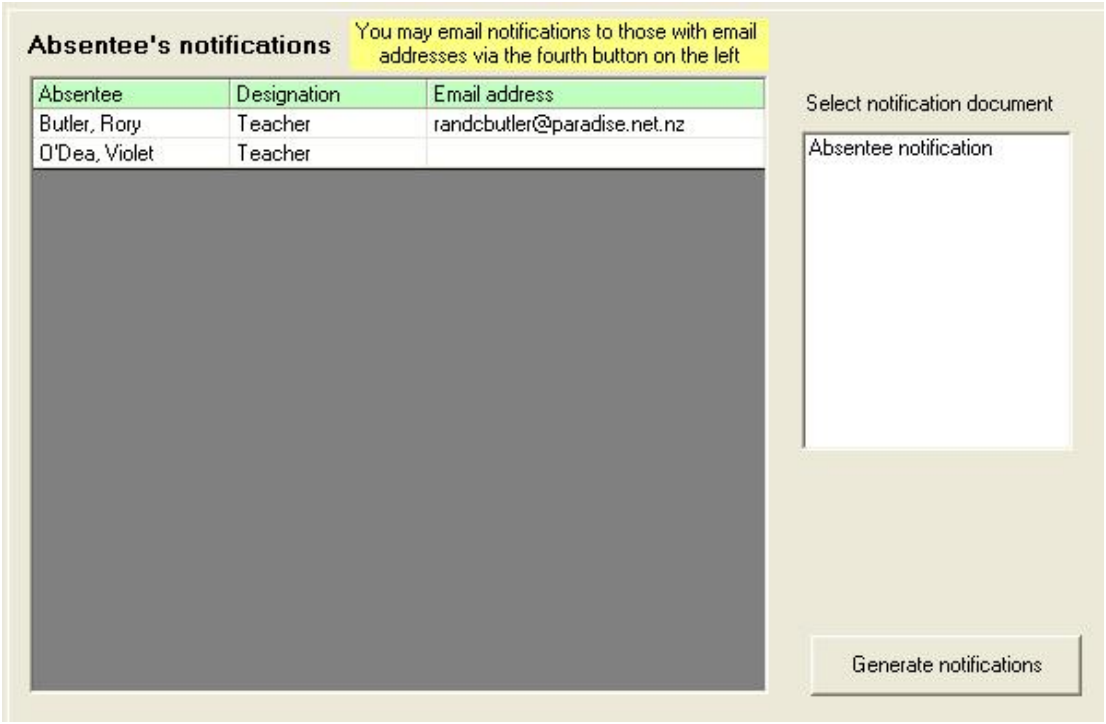


Illustration 51 : Generating absentee notifications

The similar process is based on a pre-designed document titled 'Absentee notification'. You should also visit that document in the design process to customise it for your school.

Email absentee notifications
Again, a process almost identical to that in the second printing option above.

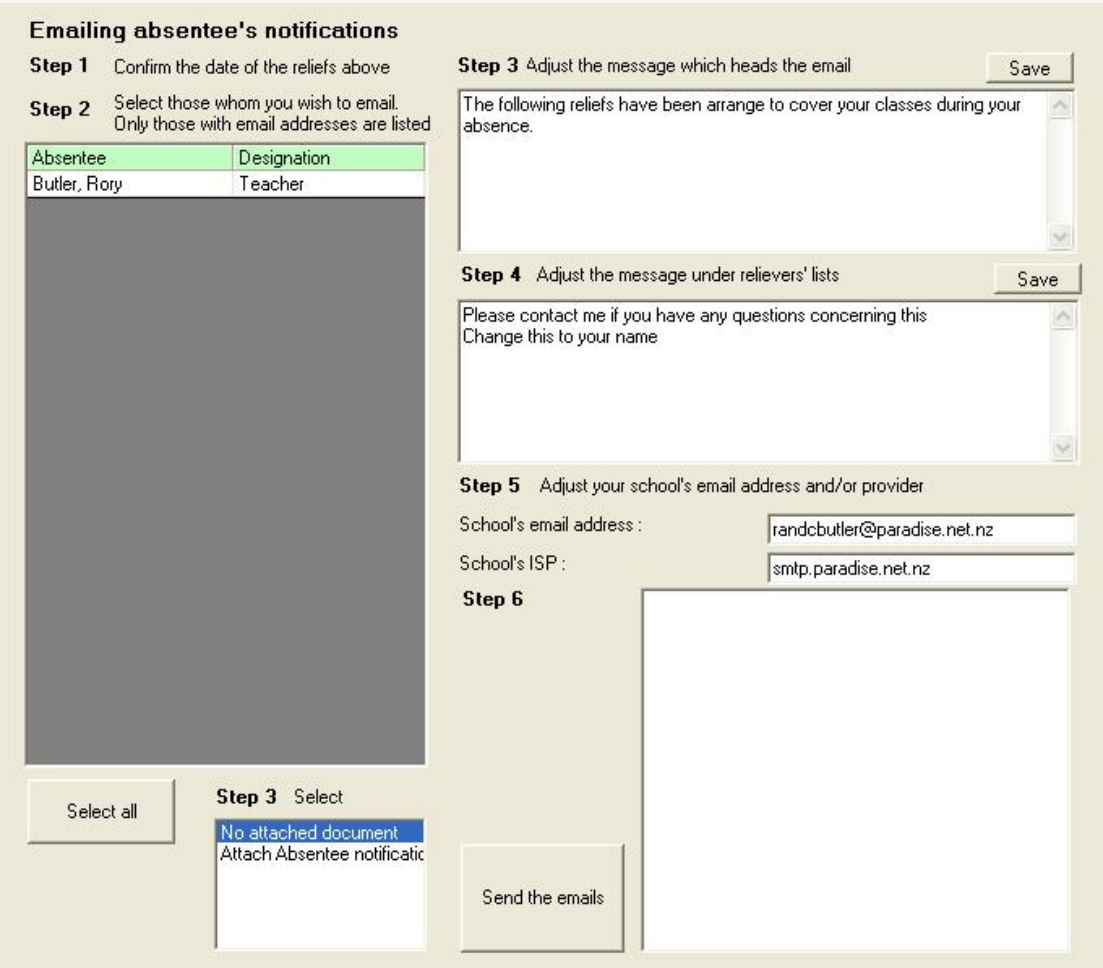


Illustration 52 : Emailing absentee notification documents

This time there is one fewer steps. As these will always go to teachers, there is no step to allow you to design the bottom note for relievers. The rest of the process is the same.

Daily relief summaries

It is possible to generate a list of the reliefs arranged for the nominated day. The options shown below allow you several possible formats. The summary includes a list of 'other absences'.

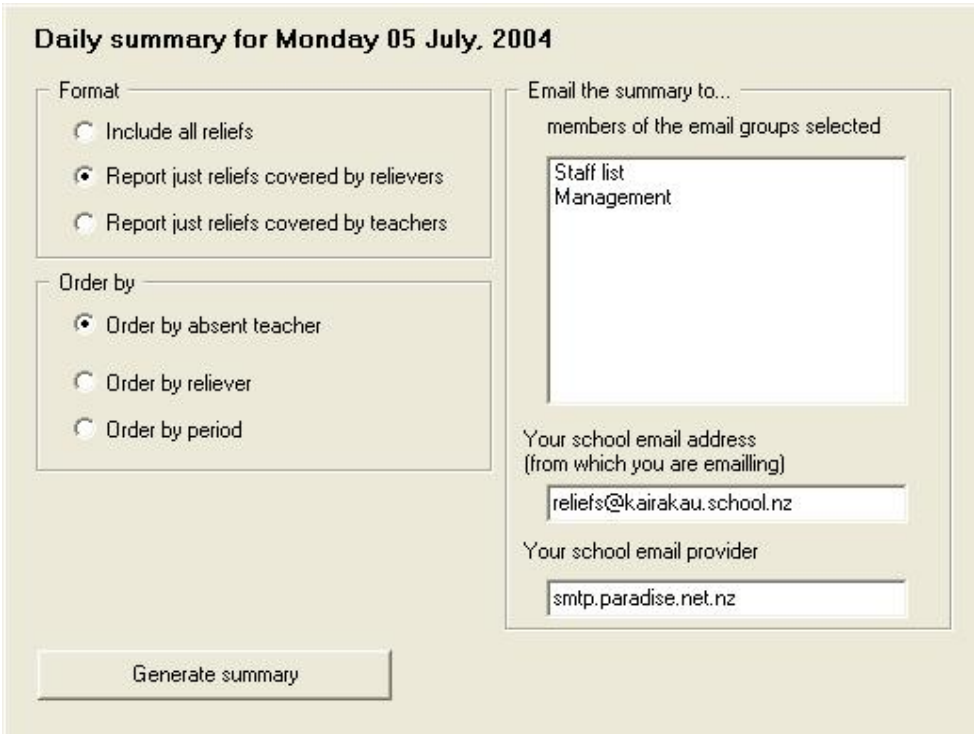
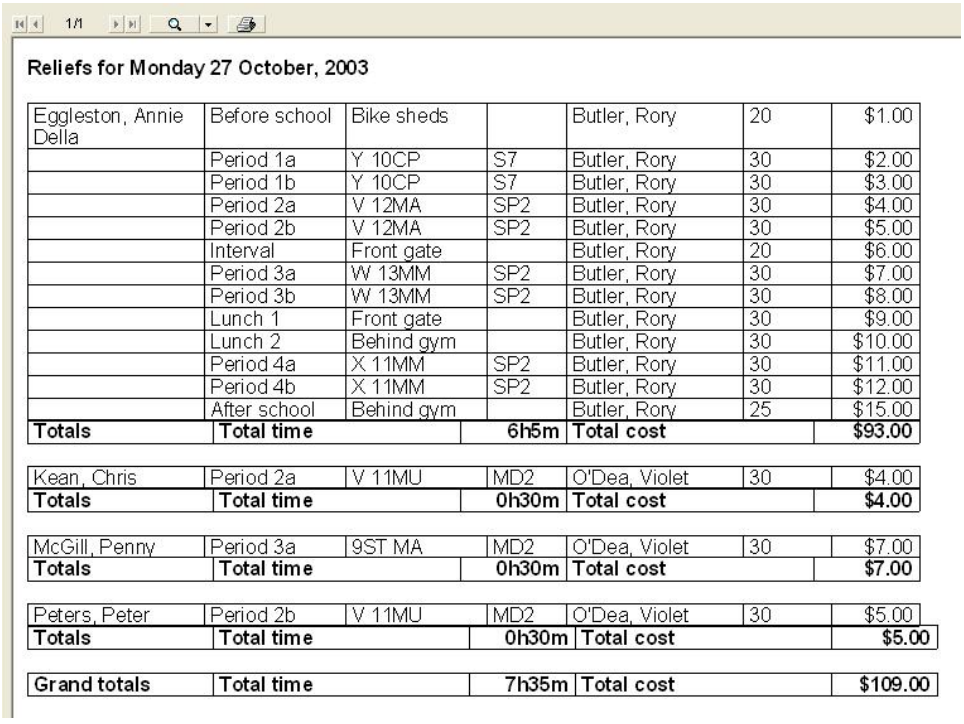


Illustration 53 : Generating (and emailing) a day relief summary

The example below is of the format specified above.



Reliefs for Monday 27 October, 2003

Eggleston, Annie Della	Before school	Bike sheds		Butler, Rory	20	$1.00
	Period 1a	Y 10CP	S7	Butler, Rory	30	$2.00
	Period 1b	Y 10CP	S7	Butler, Rory	30	$3.00
	Period 2a	V 12MA	SP2	Butler, Rory	30	$4.00
	Period 2b	V 12MA	SP2	Butler, Rory	30	$5.00
	Interval	Front gate		Butler, Rory	20	$6.00
	Period 3a	W 13MM	SP2	Butler, Rory	30	$7.00
	Period 3b	W 13MM	SP2	Butler, Rory	30	$8.00
	Lunch 1	Front gate		Butler, Rory	30	$9.00
	Lunch 2	Behind gym		Butler, Rory	30	$10.00
	Period 4a	X 11MM	SP2	Butler, Rory	30	$11.00
	Period 4b	X 11MM	SP2	Butler, Rory	30	$12.00
	After school	Behind gym		Butler, Rory	25	$15.00
Totals	**Total time**		**6h5m**	**Total cost**		**$93.00**
Kean, Chris	Period 2a	V 11MU	MD2	O'Dea, Violet	30	$4.00
Totals	**Total time**		**0h30m**	**Total cost**		**$4.00**
McGill, Penny	Period 3a	9ST MA	MD2	O'Dea, Violet	30	$7.00
Totals	**Total time**		**0h30m**	**Total cost**		**$7.00**
Peters, Peter	Period 2b	V 11MU	MD2	O'Dea, Violet	30	$5.00
Totals	**Total time**		**0h30m**	**Total cost**		**$5.00**
Grand totals	**Total time**		**7h35m**	**Total cost**		**$109.00**

Illustration 54 : The day summary

On the right of the screen are any email groups which you have specified. By selecting one or more groups you will be able to have the generated list attached to an email (as a PDF document) and sent to each member of each selected group.

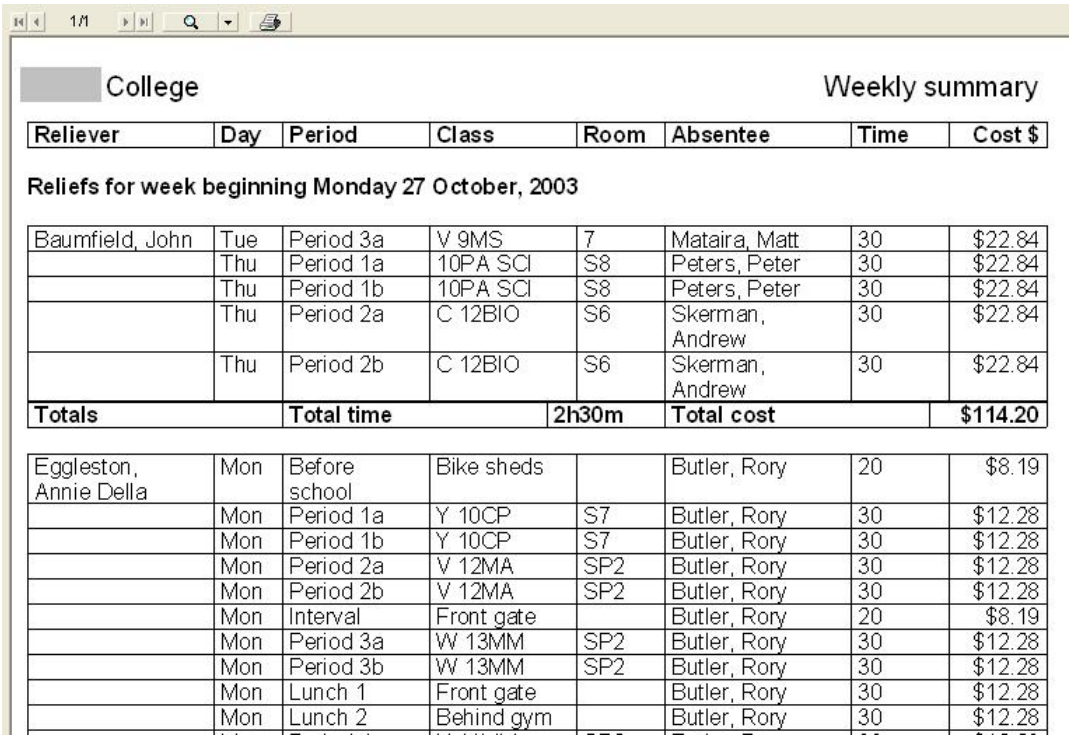
Illustration 55 : Emailing the summary

The summary is emailed by clicking on the green button which will be available at the top of the preview screen.

Weekly relief summaries

You can also print a list of the reliefs arranged for a full week.
Use the drop-down calendar to select the Monday of the week required, then select your printing options from the choices given.

The following is an extract from one such weekly summary.
N.B. These are NOT the weekly summaries which are to be sent to the authorities. Those are generated via 'Tables' under the main printing routine out in the main menu.



Reliever	Day	Period	Class	Room	Absentee	Time	Cost $
Reliefs for week beginning Monday 27 October, 2003							
Baumfield, John	Tue	Period 3a	V 9MS	7	Mataira, Matt	30	$22.84
	Thu	Period 1a	10PA SCI	S8	Peters, Peter	30	$22.84
	Thu	Period 1b	10PA SCI	S8	Peters, Peter	30	$22.84
	Thu	Period 2a	C 12BIO	S6	Skerman, Andrew	30	$22.84
	Thu	Period 2b	C 12BIO	S6	Skerman, Andrew	30	$22.84
Totals		**Total time**		**2h30m**	**Total cost**		**$114.20**
Eggleston, Annie Della	Mon	Before school	Bike sheds		Butler, Rory	20	$8.19
	Mon	Period 1a	Y 10CP	S7	Butler, Rory	30	$12.28
	Mon	Period 1b	Y 10CP	S7	Butler, Rory	30	$12.28
	Mon	Period 2a	V 12MA	SP2	Butler, Rory	30	$12.28
	Mon	Period 2b	V 12MA	SP2	Butler, Rory	30	$12.28
	Mon	Interval	Front gate		Butler, Rory	20	$8.19
	Mon	Period 3a	W 13MM	SP2	Butler, Rory	30	$12.28
	Mon	Period 3b	W 13MM	SP2	Butler, Rory	30	$12.28
	Mon	Lunch 1	Front gate		Butler, Rory	30	$12.28
	Mon	Lunch 2	Behind gym		Butler, Rory	30	$12.28

Illustration 57 : A section of a weekly summary

Reliever histories

You can generate a complete history of each teacher's or each reliever's relief for the current year. The screen for this process is shown below.

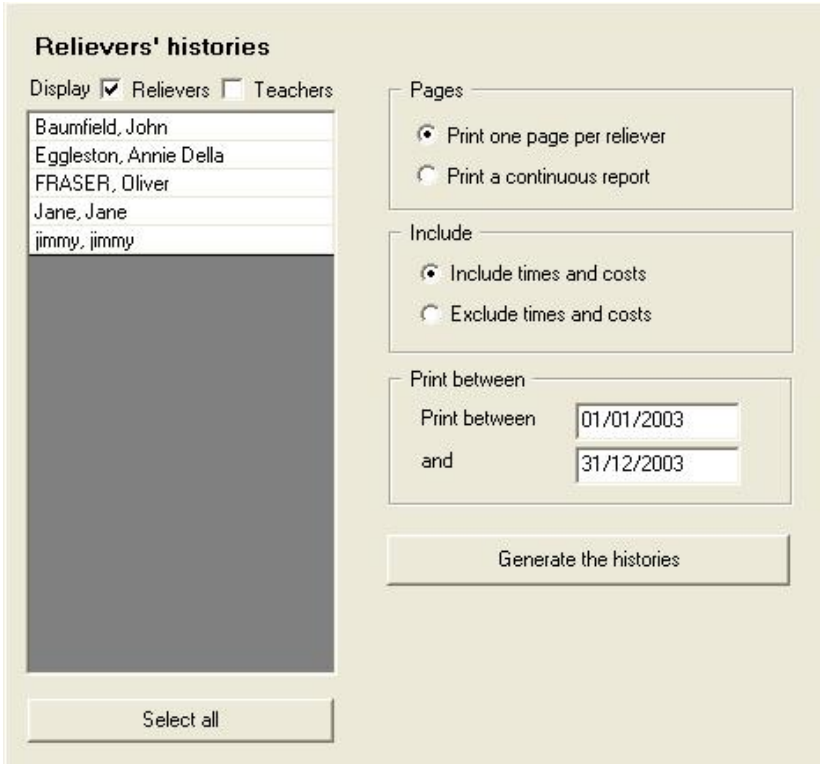
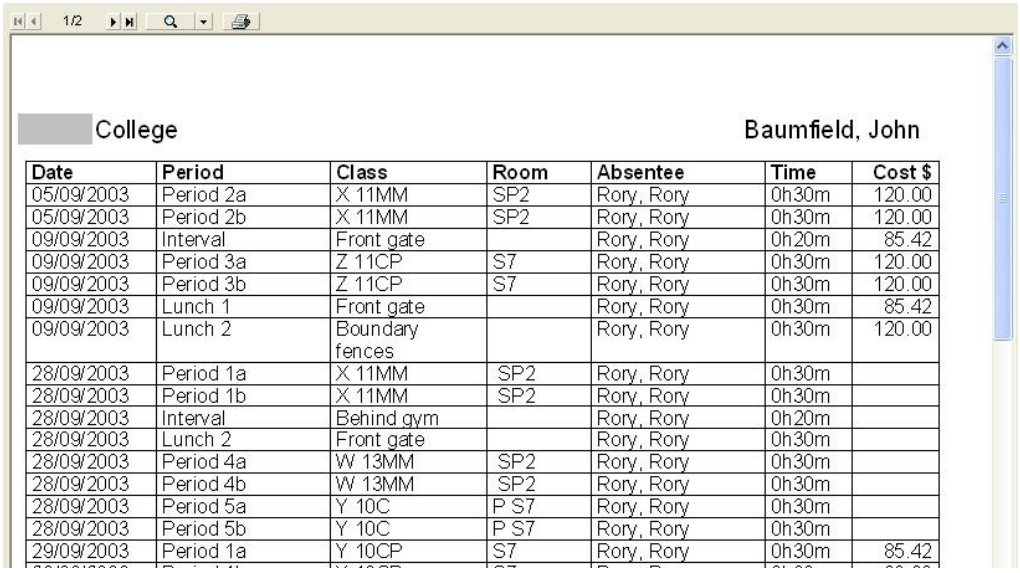


Illustration 58 : Printing individual teacher's and/or reliever's summaries.

Select Relievers and/or teachers using the two tick boxes, then select those for whom you wish to print.
Make your other choices and 'Generate the histories'.
An example of one such is shown below.



College Baumfield, John

Date	Period	Class	Room	Absentee	Time	Cost $
05/09/2003	Period 2a	X 11MM	SP2	Rory, Rory	0h30m	120.00
05/09/2003	Period 2b	X 11MM	SP2	Rory, Rory	0h30m	120.00
09/09/2003	Interval	Front gate		Rory, Rory	0h20m	85.42
09/09/2003	Period 3a	Z 11CP	S7	Rory, Rory	0h30m	120.00
09/09/2003	Period 3b	Z 11CP	S7	Rory, Rory	0h30m	120.00
09/09/2003	Lunch 1	Front gate		Rory, Rory	0h30m	85.42
09/09/2003	Lunch 2	Boundary fences		Rory, Rory	0h30m	120.00
28/09/2003	Period 1a	X 11MM	SP2	Rory, Rory	0h30m	
28/09/2003	Period 1b	X 11MM	SP2	Rory, Rory	0h30m	
28/09/2003	Interval	Behind gym		Rory, Rory	0h20m	
28/09/2003	Lunch 2	Front gate		Rory, Rory	0h30m	
28/09/2003	Period 4a	W 13MM	SP2	Rory, Rory	0h30m	
28/09/2003	Period 4b	W 13MM	SP2	Rory, Rory	0h30m	
28/09/2003	Period 5a	Y 10C	P S7	Rory, Rory	0h30m	
28/09/2003	Period 5b	Y 10C	P S7	Rory, Rory	0h30m	
29/09/2003	Period 1a	Y 10CP	S7	Rory, Rory	0h30m	85.42

Illustration 59 : An individual's summary

9.9 Processing transaction files

If you have been arranging reliefs on a remote computer then, after you have brought the temporary transaction files back to work, you need to process them to have their contents added to the school's database of reliefs.

The screen below indicates that three such files are in the holding subdirectory, ready for processing. Select one or more of them and click on the 'Process...' button.

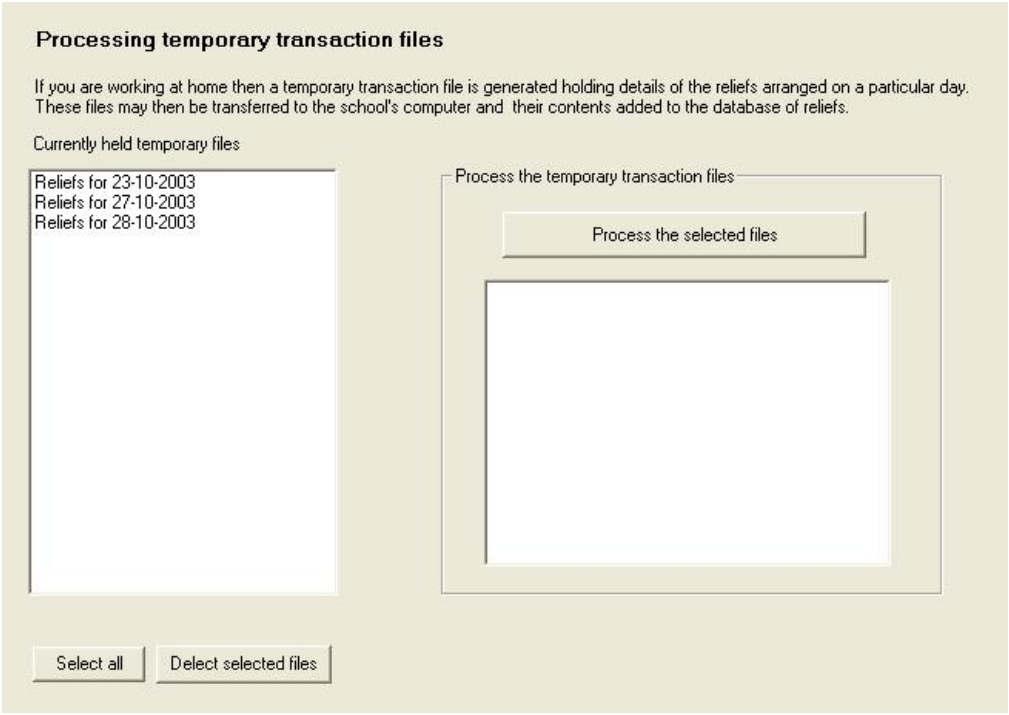


Illustration 60 : The transaction processing screen

The selected file(s) will be processed and deleted, and information concerning the processing will be made available on the right of the screen.

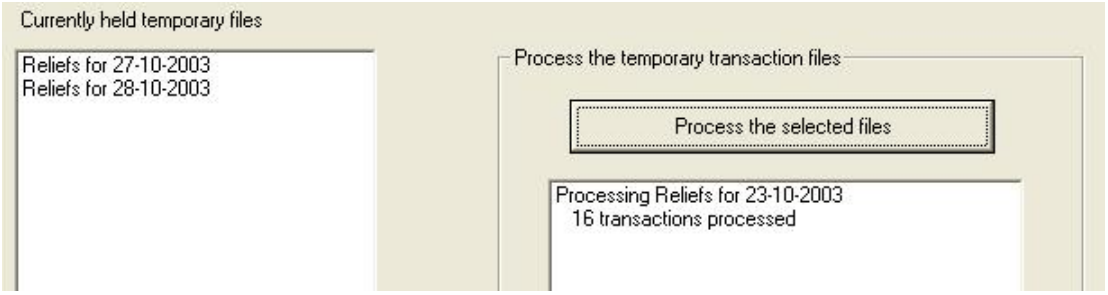


Illustration 61 : Selected files processed

13 FAQs

1. **Since installing Staff Manager some of our staff are now not listed in ClassRoom or Student Manager.**
   Select the staff member in Staff Manager, go to the **Personal** tab then **Access Rights** and put a **tick** in the CM and SM visibility box.
2. **I would like staff to be able to view but not edit their own information. Is this possible?**
   Under the Personal > Access Rights tab for each staff member tick the Can view only their own data field.
3. **Where can I enter teacher registration information and can the program warn me when each teachers registration expiry date is approaching?**
   For each staff member click on their School tab and the relevant Registration information can be entered there including expiry date.
   In Configuration > Alarm Setting you can then set the number of days ahead you wish the Alarm to trigger.
4. **I would like staff to be able to view but not edit their own information. Is this possible?**
   Under the Personal > Access Rights tab for each staff member tick the Can view only their own data field.
5. **Does Staff Manager have grid mode data entry like ClassRoom and Student Manager?**
   Yes. This view can be toggled on by selecting it from the Options menu at the top left of the screen.
6. **How can I set up pages on the User defined tab?**
   Go into Configuration > Visible sections and click the Edit userdefined pages button. Now click a page, type in a title then add the objects you require.
7. **Am I able to merge specific Staff Manager onto a document then print it?**
   This functionality is available in Print Lists > Word Processing.
8. **How do I include birthdays in the Alarm check?**
   In Configuration > Alarm setting tick Include birthdays.
9. **Is there any way I can filter the database for a specific item such as a key?**
   Your data can be filtered by clicking the Apply Filter button then selecting the item/s you wish to list.
10. **We are a primary school wanting to use the Daily Relief Organiser in Staff Manager but don't have a timetable. Can we still use this facility?**
    A timetable to suit your needs can be configured under Timetable Links then select. We are not using timetable software.
11. **I have entered staff I intend to use as relievers but they are not listing on the right hand side of the screen?**
    Ensure you have set their staff type as reliever in their Personal Details page, Designation field.

Index

- not covered by relievers 9.16 15

A

Absentee notifications 9.33 28
Access Rights 4.9 28
Address labels - printing 6.6 9
alarms - configuration 8.1 1
alarms - using 8.2 1
annual leave 4.19] 37
Applying a filter 2.2 9
Availability for reliefs 9.18 16

B

budgets for day reliefs 9.25 22

C

Checking structures1.21 7
components of Staff Manager 2.1 9
Configuration 2.2 9
Configuration of reliefs 9.20 19
Contact details 4.7 27
Conventions xi 4

D

Daily relief summaries 9.34 30
Day relief Configuration 9.20 19
Day reliefr Utilities 9.20 19
day reliefs
Printing options 9.28 25
Day reliefs
Display options 9.23 21
Removal of 9.24 21
Working at home 9.27 24
Department - days reliefs 9.7 8
discretionary leave 4.19 37

E

Edit members 2.2 ..... **9**
Email absentee notifications 9.34 ..... **29**
Email relievers' notifications 9.31 ..... **27**
emergency details 4.7 ..... **27**

F

Funding departments 9.24 ..... **22**

M

memory1.2 ..... **7**
Minimum requirements 1.3 ..... **7**
Multiple teacher entry mode - day reliefs 9.12 ..... **11**

N

Navigation buttons 4.4 ..... **24**

P

Processing transaction files CREATED AT HOME 9.39 ..... **33**

R

Relief lockouts from day relief 9.18 ..... **16**
Relief transactions - viewing 9.26 ..... **23**
Reliever details - editing 9.19 ..... **17**
Reliever histories 9.37 ..... **32**
Reliever' Notifications 9.29 ..... **25**
Rights 4.9 ..... **28**

S

Searching for a staff member4.3 ..... **23**
sick leave 4.19 ..... **37**
Staff Manager
Overview 3.1 9
Staff Manager1.8 ..... **6**
system files1.2 ..... **6**

T

Teacher Registration Number 4.10 ..... **29**
Timetable links for day reliefs 9.22 ..... **20**

W

Waiopehu College **4**
web sites Accessing 9.26 ..... **23**
Weekly relief summaries 9.36 ..... **32**
Working at home 9.27 ..... **24**