

# CIVICA

## Integris Administration Manager Training Notes



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27.0	Updated EOY Process	Derek Mathieson (Civica Education)	27/09/12
28.0	Updated for 6.97.10 and 2013	Anthony Harris and Derek Mathieson (Civica Education)	15/01/13
29.0	Updated for Term 2	Derek Mathieson (Civica Education)	15/01/13
30.0	Updated for 6.98.10	Susan Richardson (Civica Education)	17/07/13
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32.0	Updated for 7.00.10	Derek Mathieson (Civica Education)	27/06/14
32.1 32.8	Updated for 7.01.10 and 2015	Shauna Henry (Civica Education)	08/12/14
33.0	Published for 7.01.10	Derek Mathieson (Civica Education)	15/01/15
33.1	Updated after training	Derek Mathieson (Civica Education)	04/03/15
34.0	Updated for Term 2 2015	Derek Mathieson (Civica Education)	25/03/15

35.0	Updated for 7.03.10 Term 3 2015	Derek Mathieson (Civica Education)	30/06/15
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# 1 Introduction

These training notes provide a reference during and following Civica's Administration Manager training. They cover all of the main sections of the software. The Administration Manager Manual provides a comprehensive guide to the software

During training we will be working with fictitious data and all the exercises contained within this user guide refer to that data

The training is designed to start with the focus of the integrated set of modules – Student Details, to provide users with an understanding of the look and feel of the software. The program progresses through the other functions and features of the software

## 1.1 What is the Administration Manager Module?

Administration Manager is a Windows-based database that enables schools to keep detailed student and staff records and use these records to produce a wide range of reports. Student data is stored in four data sections – Admissions, Current Roll, External Roll and Former Roll. Each student record is divided into several sections such as personal, additional information, activities, attendance history, medical details and teaching sets. There is also an Emergency feature for fast access to student data.

Other functions include Speed Edit, Control functions, Year End functions, Admissions, Standard and Ad Hoc Reports

The system is relatively easy to use and maintain. Administration Manager is a powerful tool that will give administrators smooth access to information with a well-structured, logical layout

## 1.2 Administration Manager Training Program

### Day One

Time	Content
9.00 am	Introduction Menu Bar Side Bars System Preferences Parameters
10.30 am	Morning Tea
10.50 am	Staff Details Administrator Tasks Student Details Current Roll
12.20 pm	Lunch
1.00 pm	Admissions Roll Former Roll Importing and Exporting Student Data
2.30 pm	Afternoon Tea
2.50 pm	User Defined Information Speed Edit Ad Hoc Report Groups

### Day Two

Time	Content
9.00	Review Questions
9.15 am	Mail Merge
10.30 am	Morning Tea
10.50 am	School Details Year End Process
12.20 pm	Lunch
1.00 pm	Year End Process (cont.) Reports
3.30pm	Finish

## 1.3 Training Outcomes

At the end of the two days, training participants will be able to:

- Navigate their way through the side bar options in both the General and Administration Modules of Integris.
- Set up system defaults and preferences
- Locate and edit specific parameters
- Enter staff details
- Set up users
- Set up User Permissions
- View, find, add and edit student records
- Use the current and external rolls to enrol students
- Produce an emergency report
- Move students to the Former Roll
- Use the Admissions Roll to enter students
- Understand the procedures for importing and exporting data
- Create a User Defined Field
- Speed Edit student records
- Produce an 'Ad-Hoc' report
- Create Groups
- Create a kst template for use in Mail Merge
- Use the mail merge function to generate a document
- Use MS Word to produce a Mail Merge document
- Follow the Year End Process
- Produce standard reports

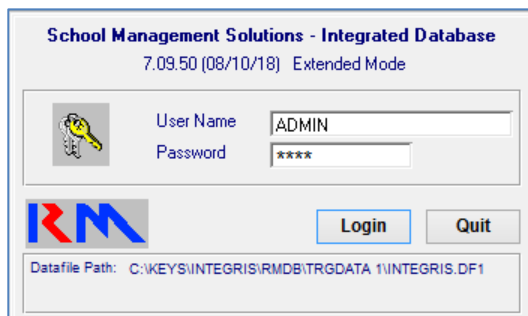
## 1.4 Logging On

### Activity:

- To log on, double click on the **Integris Training** icon on the desktop



- Type **ADMIN** as the User Name for use in today's training
- Press **<Tab>** to move the cursor to the Password box
- Enter the password: **keys**

A screenshot of the "School Management Solutions - Integrated Database" login window. The window title is "School Management Solutions - Integrated Database" and it shows the version "7.09.50 (08/10/18)" and "Extended Mode". There is a key icon on the left. The "User Name" field contains "ADMIN" and the "Password" field contains "\*\*\*\*". Below the fields is a logo with the letters "RM" in red and blue. There are "Login" and "Quit" buttons. At the bottom, it shows the "Datafile Path: C:\KEYS\INTEGRIS\RMDB\TRGDATA 1\INTEGRIS.DF1".

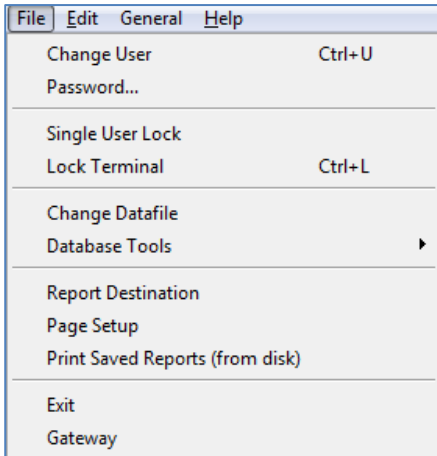
- Click on **Login** or press **<Enter>**

**Note: It is strongly recommended that you change your password once a month.**

## 2 Menus

File Edit Curriculum Manager General Help

### 2.1 The File Menu

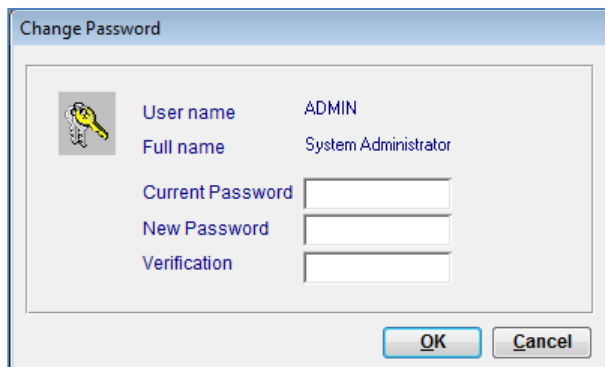


#### 2.1.1 Change Password

Once users have been set up with access to the software, they can change their password at any time.

### Activity

#### File > Password



The user would enter their Current Password, press **<Tab>** to the **New Password** field and enter the new password, then enter the new password again in the **Verification** field.

- Click **Cancel** as we will not be changing passwords today

### 2.1.2 Change User

If the software is open and another user wishes to use it, make sure they log on using their own user name and password to ensure they only have access to the appropriate sections of the software.

#### Activity

##### File > Change User

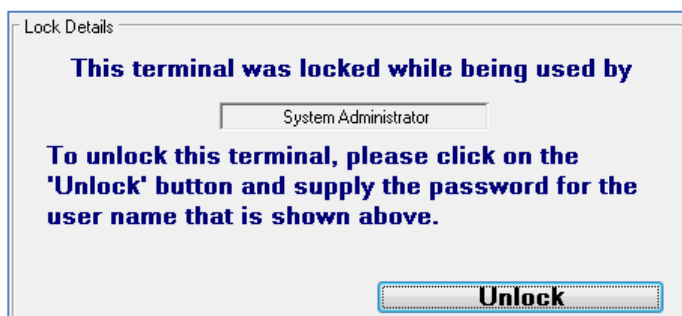
- Log in again with the User Name **ADMIN** and the Password **keys**

### 2.1.3 Lock Terminal

Some sections of the software display confidential data. If a user is working on confidential data and needs to conceal the data, or if they are leaving the computer and do not want anyone else to use the software while they are away, they can use **Lock Terminal** to temporarily lock the screen

#### Activity

##### File > Lock Terminal



The screen is locked

##### To unlock the screen:

- Click **Unlock**
- Enter your password



- Click **OK**

### 2.1.4 Single User Lock

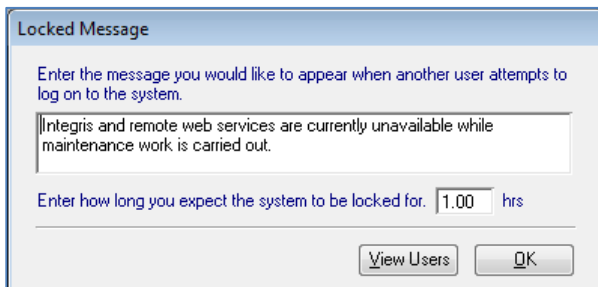
Use **Single User Lock** to bar global access to Integris when single user mode is required. This function is accessible to all users with administrator status

## Activity

### File > Single User Lock



- Enter your password



If other users are logged in, their details can be displayed via the **View Users** button so that the administrator can ask them to exit the system.



- Click **OK**

The following icon appears under the Menu Bar:





When the lock is applied, users attempting to access the system will be presented with a message indicating the system will be unavailable for a specified period of time. This window will automatically close and exit the Integrus session after 15 seconds. Only Administrators who initiated the lock can log into Integrus at this time.

The screenshot shows the 'School Management Solutions - Integrated Database' login window. At the top, it displays the version '7.09.40 [17/07/18] Extended Mode'. Below this is a login section with a key icon, 'User Name' and 'Password' fields, and 'Login' and 'Quit' buttons. The 'Datafile Path' is shown as 'C:\KEYS\INTEGRIS\RMDB\TRGDATA1\INTEGRIS.DF1'. The 'Single User Lock' section is active, featuring a yellow warning triangle icon and a message: 'Integrus and remote web services are currently unavailable while maintenance work is carried out.' Below the message, it states 'It was locked by System Administrator who has sole access' and 'It was locked on 17 JAN 2019 at 14:35 for 1.00 hours'. A red banner at the bottom of the lock section reads 'Integrus will automatically close in 10 seconds'.

#### To return to Multi-user mode:

- Click Single User Lock 
- Click **Restore Multi-user**

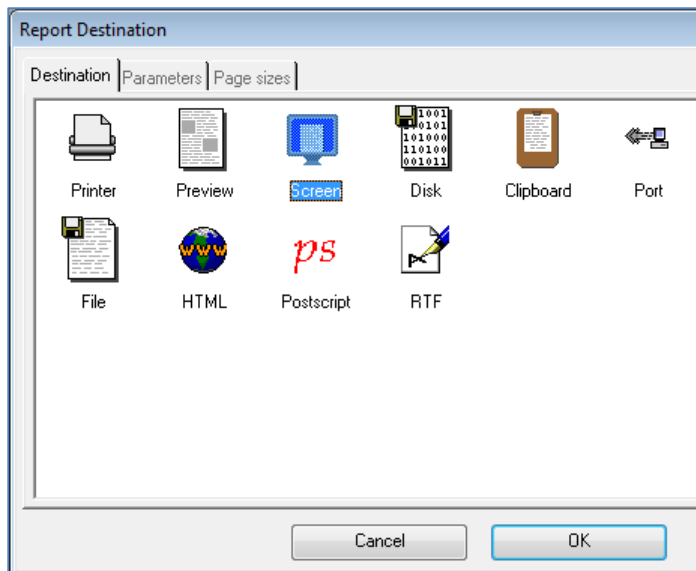
The screenshot shows a 'Single User Lock' dialog box. It contains a lock icon, the text 'Enter Password', and a password input field with 'XXXX' as a placeholder. At the bottom are 'Cancel' and 'OK' buttons.

- Type your password
- Click **OK** or Press **<Enter>**

## 2.1.5 Report Destination

### Activity

#### File > Report Destination



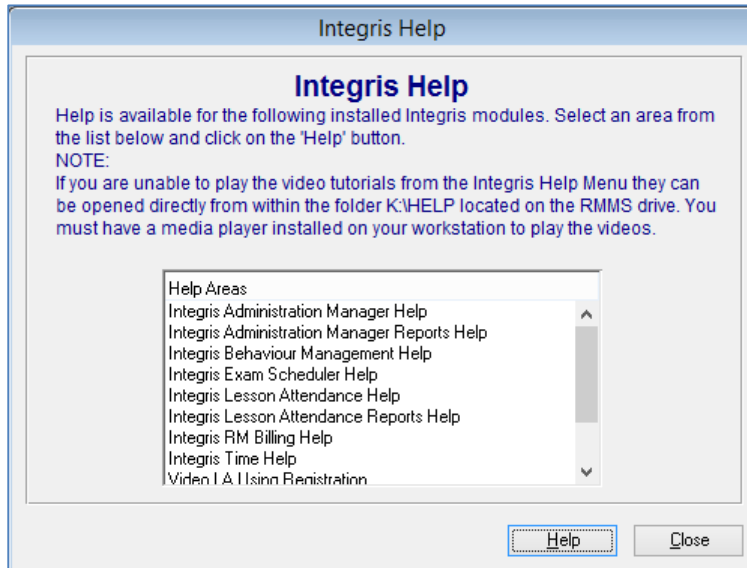
- View the various options
- Click **Cancel**

## 2.2 The Help Menu

### 2.2.1 Help Contents and Index

#### Activity

##### Help > Help Contents and Index



- Highlight ***Integris Administration Manager Help***
- Click ***Help***
- View the ***Administration Manager*** manual
- Click ***Close***

**Notes: <Ctrl + F> allows you to search a document for a specific topic. Check Section 22 of these Training Notes for all details of Support available to schools. Holding down <Shift> <Ctrl> + F will open the Full Reader Search window as shown below.**

Search

☐ Arrange Windows

Where would you like to search?

☒ In the current document

☐ All PDF Documents in

What word or phrase would you like to search for?

☐ Whole words only

☐ Case-Sensitive

☐ Include Bookmarks

☐ Include Comments

Search

## 2.3 Using the Side Bars

Once you have logged onto the system, a blank window with a control panel (side bar) appears on the right-hand side of the screen. The **General** side bar is displayed.

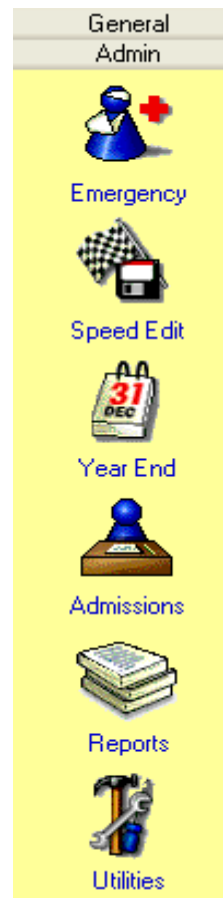


The **Administration** Module comprises two sidebars. The one on the left of this page is the **General** side bar. This provides access to the core functions. From here, you can enter school details, view and enter student and staff details and create groups of students and staff.

It is also where schools set up their own parameters for the system and use the **Control** function to add new modules and set up new users and passwords.

By clicking on the **Admin** tab on the bottom of the side bar, a second bar is revealed. This is the **Admin** side bar - seen on the right.

The **Admin** side bar provides an emergency report function, enables users to speed edit information in students' records, carry out Year End procedures and produce reports.



### Activity

- Click on each of the sidebar headings and view the various icons in each
- In today's training the following modules are loaded:



### 3 System Preferences

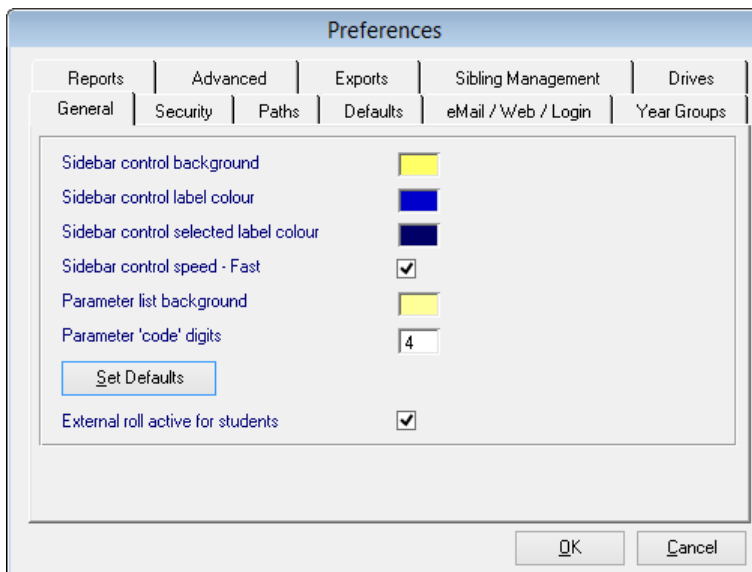
General > Control > Preferences

#### Activity

##### General > Control > Preferences > General tab

Integris is able to accommodate visiting students who may come to a school for various periods or activities on a regular basis, but who are not actually enrolled at the school.

- Tick **External roll active for students**



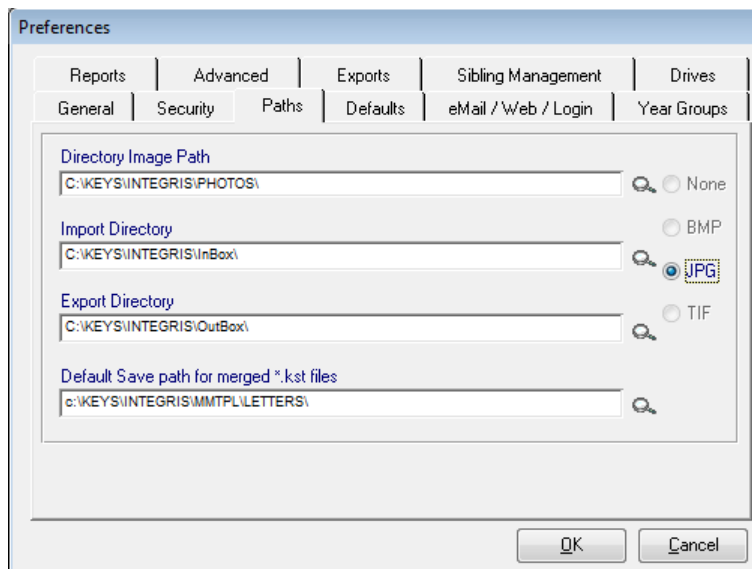
The screenshot shows the 'Preferences' dialog box with the 'General' tab selected. The dialog has a title bar 'Preferences' and a tabbed interface. The tabs are: Reports, Advanced, Exports, Sibling Management, Drives, General (selected), Security, Paths, Defaults, eMail / Web / Login, and Year Groups. The 'General' tab contains the following settings:

Setting	Value
Sidebar control background	Yellow color swatch
Sidebar control label colour	Blue color swatch
Sidebar control selected label colour	Dark blue color swatch
Sidebar control speed - Fast	<input checked="" type="checkbox"/>
Parameter list background	Yellow color swatch
Parameter 'code' digits	4
Set Defaults	Button
External roll active for students	<input checked="" type="checkbox"/>

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

## General > Control > Preferences > Paths tab

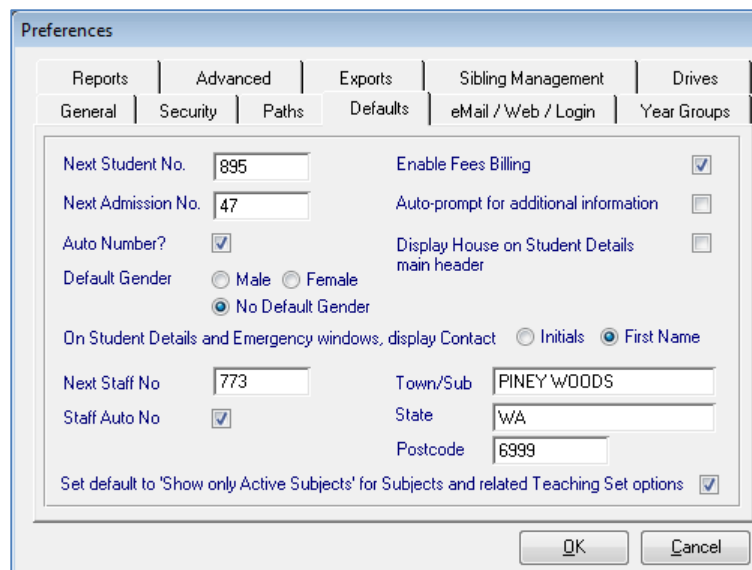
The paths tab displays the default pathways that Integris uses to locate images, import and export data and to saved mail merged kst documents.



The screenshot shows the 'Preferences' dialog box with the 'Paths' tab selected. The 'Directory Image Path' field is highlighted with a magnifying glass icon. The 'Import Directory' field is also highlighted with a magnifying glass icon. The 'Export Directory' field is highlighted with a magnifying glass icon. The 'Default Save path for merged \*.kst files' field is highlighted with a magnifying glass icon. The 'Directory Image Path' field contains the text 'C:\KEYS\INTEGRIS\PHOTOS\'. The 'Import Directory' field contains the text 'C:\KEYS\INTEGRIS\InBox\'. The 'Export Directory' field contains the text 'C:\KEYS\INTEGRIS\OutBox\'. The 'Default Save path for merged \*.kst files' field contains the text 'C:\KEYS\INTEGRIS\MMTPL\LETTERS\'. The 'Directory Image Path' field has a magnifying glass icon and a 'None' radio button. The 'Import Directory' field has a magnifying glass icon and radio buttons for 'BMP', 'JPG', and 'TIF'. The 'Export Directory' field has a magnifying glass icon. The 'Default Save path for merged \*.kst files' field has a magnifying glass icon. The 'OK' and 'Cancel' buttons are at the bottom.

Enter the pathway by clicking on the magnifying glass icon and locating the folder. Click on the folder, the path will now be displayed in the Directory Image Path field as shown above.

## General > Control > Preferences > Defaults tab



The screenshot shows the 'Preferences' dialog box with the 'Defaults' tab selected. The 'Next Student No' field contains the value '895'. The 'Next Admission No' field contains the value '47'. The 'Auto Number?' checkbox is checked. The 'Default Gender' section has radio buttons for 'Male', 'Female', and 'No Default Gender', with 'No Default Gender' selected. The 'On Student Details and Emergency windows, display Contact' section has radio buttons for 'Initials' and 'First Name', with 'First Name' selected. The 'Next Staff No' field contains the value '773'. The 'Staff Auto No' checkbox is checked. The 'Town/Sub' field contains the value 'PINEY WOODS'. The 'State' field contains the value 'WA'. The 'Postcode' field contains the value '6999'. The 'Set default to 'Show only Active Subjects' for Subjects and related Teaching Set options' checkbox is checked. The 'OK' and 'Cancel' buttons are at the bottom.

**Note: The option of 'No Default Gender' must be selected for WA DoE schools. When adding new students the gender will then appear blank and the user must select the relevant gender.**



## General > Control > Preferences > Reports tab

The screenshot shows the 'Preferences' dialog box with the 'Reports' tab selected. The 'Report Heading Image Path' field contains 'C:\keys\INTEGRIS\CM\Images\admin logo.jpg'. The 'Report Heading' field contains 'West Coast District High School'. The 'Default Report Footer' field is empty. The 'Display Report Location Footers' checkbox is checked. The 'OK' and 'Cancel' buttons are at the bottom right.

- Tick the box to Display Report Location Footers

## General > Control > Preferences > eMail/Web/Login tab

The screenshot shows the 'Preferences' dialog box with the 'eMail / Web / Login' tab selected. The 'SMTP Server Address or Name' field is empty. The 'Default 'From' eMail Address' field contains 'WCPS@inet.net.au'. The 'Launch Staff Notices window on logging into Integris' checkbox is checked. The 'Staff Notices Login Image File' field contains 'C:\keys\INTEGRIS\PHOTOS\NoticesPhoto.jpeg'. The 'Staff Notice' section shows a font of 'Arial' and a font size of '12'. The text area contains: 'Welcome to Integris Training. This Staff Notices page can be used to deliver information to your staff when they login to Integris. Schools can also add a photograph.' The 'OK' and 'Cancel' buttons are at the bottom right.

- Change the message if required
- Click  and navigate to **C:\keys\INTEGRIS\PHOTOS** to select a new image
- Click OK to save changes

**Note: The maximum size for a jpeg file is 23.5cm x 12cm. Optimal size is 600 x 350 pixels.**

## 4 Parameters

### General > Parameters

Various windows within Integris contain fields with information. Some of these fields have drop-down menus. The items in these drop-down menus are referred to as **Parameters**. In other words, many fields are completed by choosing values from a list. For example, when adding a staff member's Indigenous Status, a user cannot simply type in **Aboriginal**, it must be selected from a pre-defined list. These lists are set up in **Parameters**.

**Note: The length of Parameter codes is set up in Control > Preferences > General > Parameter 'code' digits.**

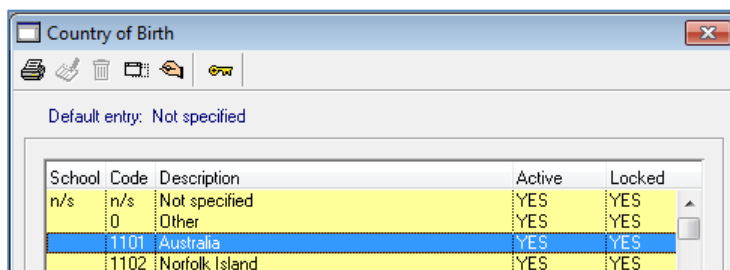
The Department of Education (DoE) manages several data fields. These fields must not be edited or added to. DoE will ensure that these key parameter fields are updated as required. The managed fields are:

- Allowance Type
- Country of Birth
- First Language
- Indigenous Status
- Previous/Destination School
- Religion
- Year Groups
- VISA Sub Class Numbers

### Activity

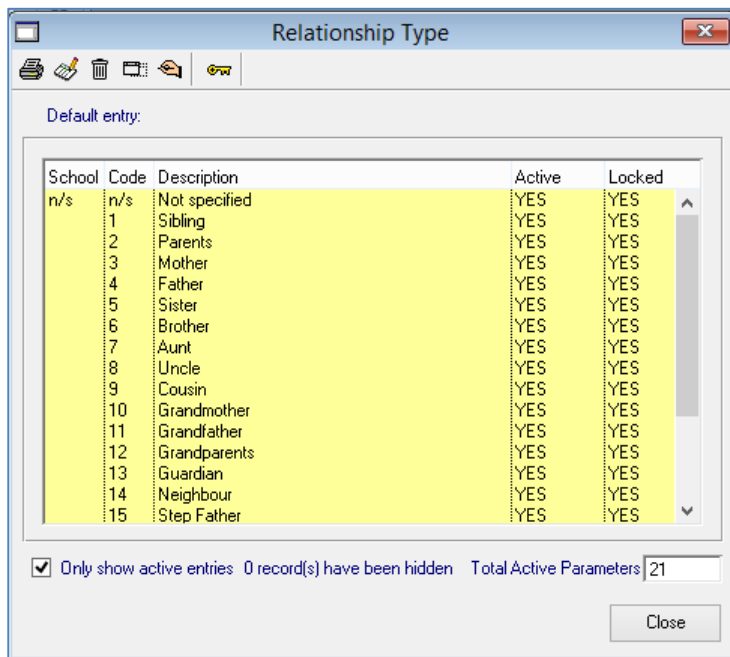
#### General > Parameters > Country of Birth

- Highlight **Australia**
- Click **Make Current Line Default** 



- Close the window

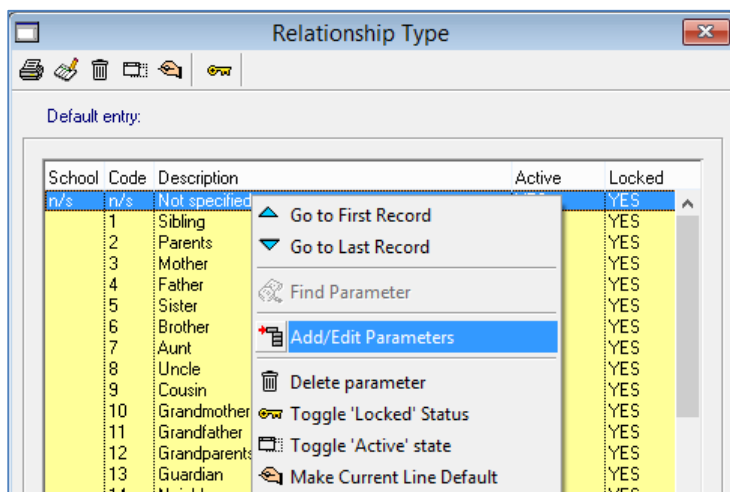
## General > Parameters > Relationship Type



The Parameters window displays all the parameters. Some can be added and also edited.

**Note: Not Specified parameters should not be edited or deleted**

- Right click in the list of Relationship Type

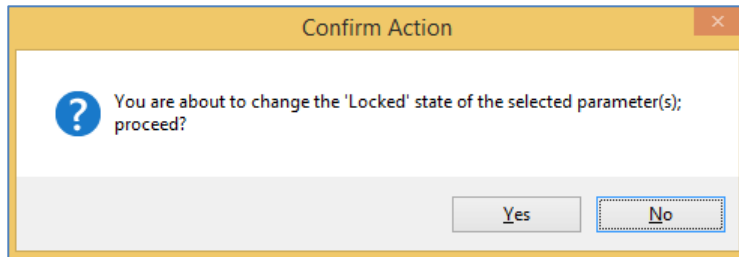


- Select **Add/Edit Parameters**
- Enter **21** as the Code
- Enter **Partner** as the Description

School	Code.	Description
	21	Partner

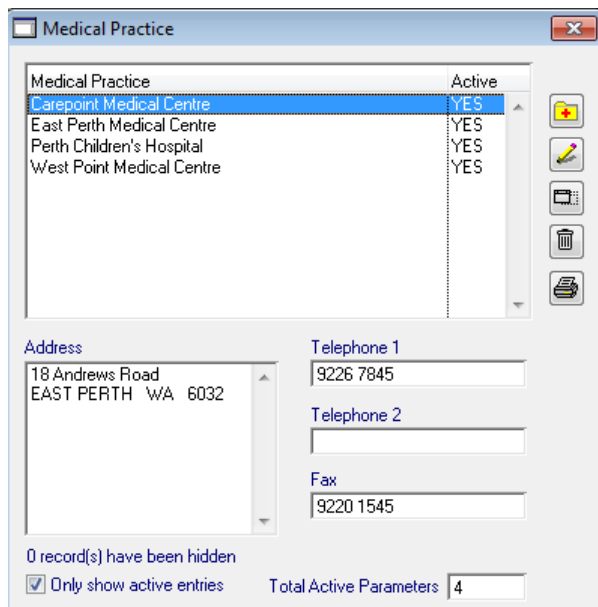
- Click **OK**

- Highlight the new parameter and lock it



- Click **Yes** to the message
- Close the **Relationship Type** Parameter

### General > Parameters > Medical Practices



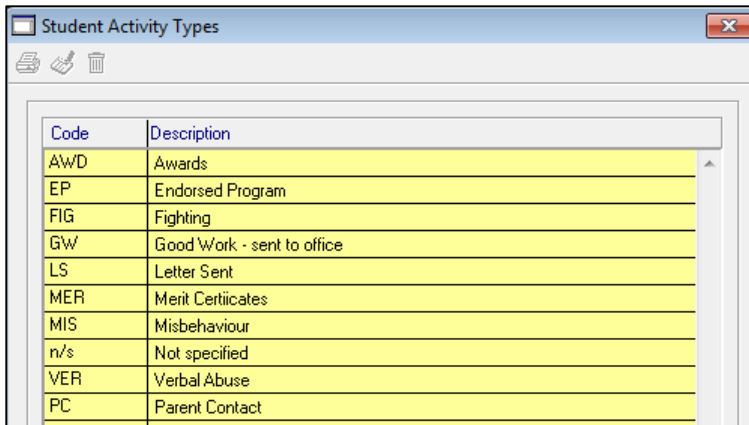
- Click **Add Practice** 
- Enter the details of a Medical Practice close to your school
- Click **OK**
- Close the **Medical Practices** parameter

## General > Parameters > Student Activity Types

- Add the activity type **Parent Contact**
- Right click in the list of **Student Activity Types**
- Select **Add New Parameter**
- Enter **PC** as the Code
- Enter **Parent Contact** as the Description

PC	Parent Contact
----	----------------

- Click **OK**



The screenshot shows a window titled 'Student Activity Types' with a table containing the following data:

Code	Description
AWD	Awards
EP	Endorsed Program
FIG	Fighting
GW	Good Work - sent to office
LS	Letter Sent
MER	Merit Certificates
MIS	Misbehaviour
n/s	Not specified
VER	Verbal Abuse
PC	Parent Contact

- Close the **Student Activity Types** window

## 5 Staff Details

### General > Staff Details

Administration Manager can hold details on staff. The staffing section of the system is accessed via the **Staff Details** icon on the General side bar. Functionally it is very similar to the Student window, using many of the same icons.

**Staff**

Current

**Ms Elaine Abbott (2400)** **Staff Code - ABBE**


Gender - Female **Staff Type - Permanent** **ID Number - N2400**

Initials	E	Salutation	Ms Abbott	Phone 1	9370 9898
Surname	Abbott	Address	55 Smith Street, PERTH, WA, 6000	Phone 2	
Legal Surname	Abbott			Fax	9370 9899
Former Surname				Mobile	040 777 1439
First Name	Elaine				
Second Name	Joy				
Third Name					
Preferred Name	Lainey				
Date of Birth	28 DEC 1977	E Mail	lainey@ozemail.com.au		
ID Number	N2400	Join Date	16 AUG 2007	Leave Date	

**Contacts** **NoK - Next of Kin** **Emrg - Emergency**

Name	Relationship	Phone	Address	NoK	Emrg
Anne Greateorex	Sister	0517 654311	PINEY WOODS, WA, 6999	No	Yes
Mr Frank Hawter	Not specified	9087 7700	1 St Georges Tce, PERTH, WA, 6999	Yes	No

Search

To add a new member of staff click **Add**.  The following window will appear, enabling users to enter relevant information.

**Staff**

**2400   Ms Elaine Abbott   N2400   Female   ABBE**

Personal Info | Additional Info | Contacts | UDI | Qualifications | Groups | Teaching | Training / Skills | Contracts


Title	Initials	Surname	Salutation	Ms Abbott
Ms	E	Abbott	Address	55 Smith Street
First Name	Elaine	Preferred Name	Lainey	
Second Name	Joy			
Third Name				
Legal Surname	Abbott	Former Surname		
Gender	<input type="radio"/> Male	Date of Birth	28 DEC 1977	Town/Sub
	<input checked="" type="radio"/> Female			PERTH
				State
				WA
				Postcode
				6000
				Country
Staff Code	ABBE	Join Date	16 AUG 2007	Tel. 1
Reference	2400	Leave Date		9370 9898
ID Number	N2400			Tel. 2
				Fax
				9370 9899
				Mobile No.
				040 777 1439
				E-Mail
				lainey@ozemail.com.au
Staff Type	Permanent			

OK Cancel

To edit a staff member's details, locate their record and click on **Edit**. 

## Activity


### General > Staff Details

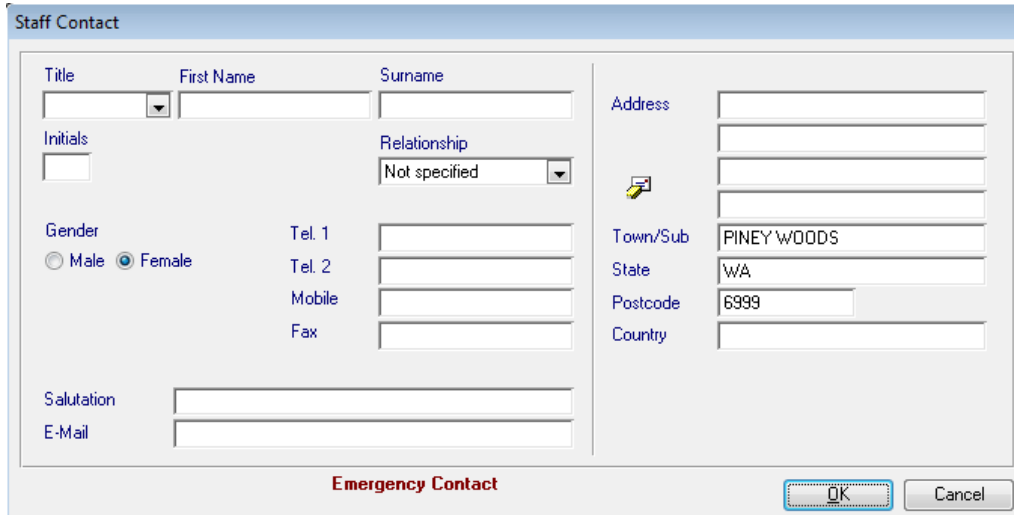
- Click Add 
- Enter the following information about yourself, tabbing between the fields:
  - Title
  - Surname \*
  - First Name \*
  - Gender
  - Date of Birth \*
  - Staff Code \* (first three letters of your surname and your first initial)
  - ID Number (E code)\*
  - Staff Type

**Note:** \* indicates the field is mandatory



## Contacts

- Click on the **Contacts** tab to enter the details of a next of kin contact
- Click **Add Staff Contact** 
- Enter details for a contact




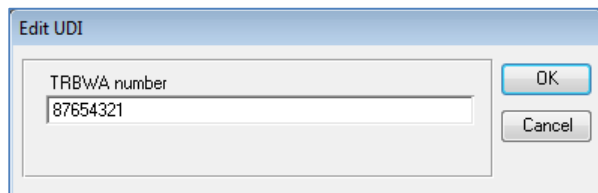
The 'Staff Contact' form is a window with a light blue title bar. It contains several input fields and dropdown menus. On the left, there are fields for Title, First Name, Surname, Initials, Relationship (dropdown), Gender (radio buttons for Male and Female), Tel. 1, Tel. 2, Mobile, Fax, Salutation, and E-Mail. On the right, there are fields for Address, Town/Sub (pre-filled with 'PINEY WOODS'), State (pre-filled with 'WA'), Postcode (pre-filled with '6999'), and Country. At the bottom, there is a red 'Emergency Contact' checkbox and 'OK' and 'Cancel' buttons.

- Click **OK**
- Place a tick in each of the **Emergency** and **Next of Kin** checkboxes

## UDI – Teacher Registration Board WA Number

All teachers who are teaching in Western Australian schools are required to be registered with the Teacher's Registration Board WA. The TRBWA number issued to the teacher must be recorded in the UDI field for each teacher.

- Click on the **UDI** tab
- Double Click on **TRBWA Number** or highlight **TRBWA Number** and click on **Edit UDI** 
- Enter the TRBWA number



The 'Edit UDI' form is a small window with a light blue title bar. It contains a single text input field labeled 'TRBWA number' with the value '87654321'. To the right of the input field are 'OK' and 'Cancel' buttons.


- Click **OK** to save
- Click **OK** to save the Staff Details entered

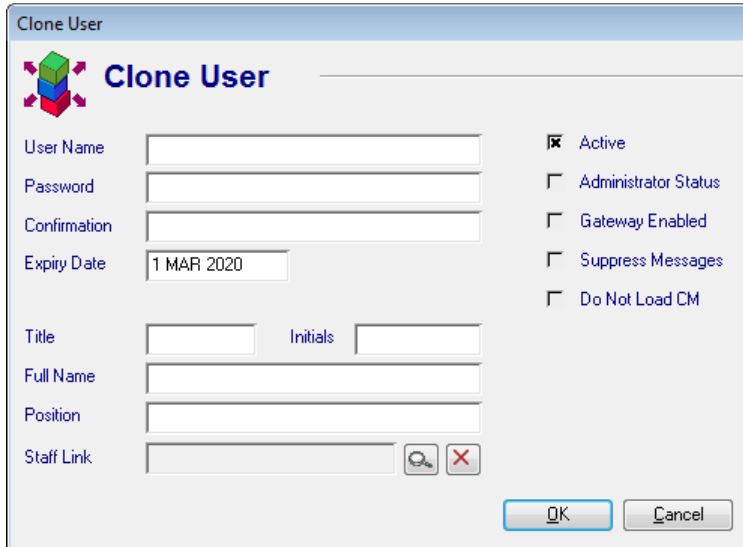
**Note: The Working with Children Check will be managed through HRMIS.**

## 6 Administrator Tasks

### 6.1 Setting up New Users

#### General > Control > Users

- Highlight the user **ABBOTT**
- Click **Clone User** 



The 'Clone User' dialog box is shown. It has a title bar 'Clone User' and a close button. The dialog contains several input fields and checkboxes. On the left, there are fields for 'User Name', 'Password', 'Confirmation', 'Expiry Date' (set to '1 MAR 2020'), 'Title', 'Initials', 'Full Name', 'Position', and 'Staff Link'. On the right, there are checkboxes for 'Active' (checked), 'Administrator Status', 'Gateway Enabled', 'Suppress Messages', and 'Do Not Load CM'. At the bottom, there are 'OK' and 'Cancel' buttons.

**Note:** Users who require Administrator Status can have that box checked when Cloning. Access Rights will not expire when the user has administrator rights.

- Enter your user name
- **<Tab>**
- Enter the password as **Password**
- **<Tab>**
- Confirm the password
- **<Tab>**
- Enter your title, initials, full name and position, **<Tab>** between the fields

If the new user is a teacher, his or her account must be linked to the information entered in Staff Details.

- Click Find Staff Member 

- Enter the first three letters of your surname in the **Name/Number** field
- Click **Find**

Staff Search - Extended Mode

General | Parameters | Dates | Address | Other | UDI

Name/Number: MAT Status: Current

Preferred Name:

First Name:

Former Surname:

ID Number:

Gender: --n/s--

Staff Code:

Staff Type: --n/s--

Find Close

- If necessary, **Select** your name from the list
- Click **OK** to save the new user account

**Note: The school's system administrator user name is SCHADM. This is the default account, and you must not delete it from the system. The user name ADMIN is used by Civica for support purposes and the user name EDWA by DoE. These should not be edited or deleted.**

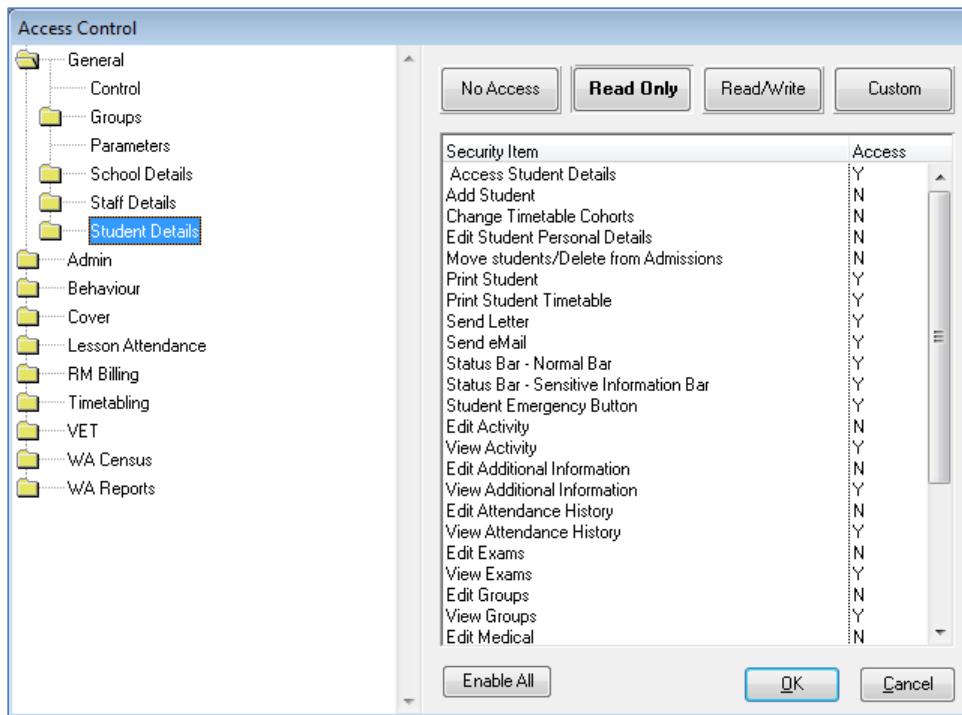
## 6.2 User Access Rights

### 6.2.1 Setting up User Access Rights

#### Activity

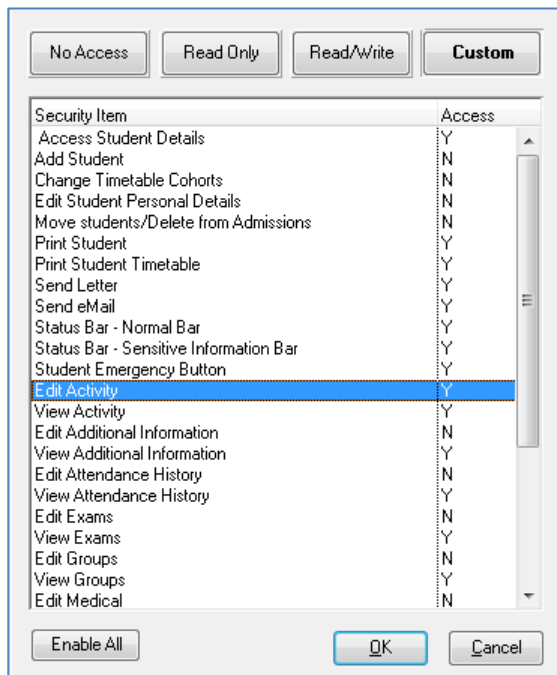
##### General > Control > Users

- Double click on **Elaine Abbott**
- Click on the **General** folder and highlight **Student Details**

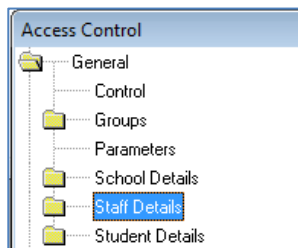


Elaine currently has **Read Only** access

- Double click on **Edit Activity** to grant her access to Students' activities



- Highlight **Staff Details**




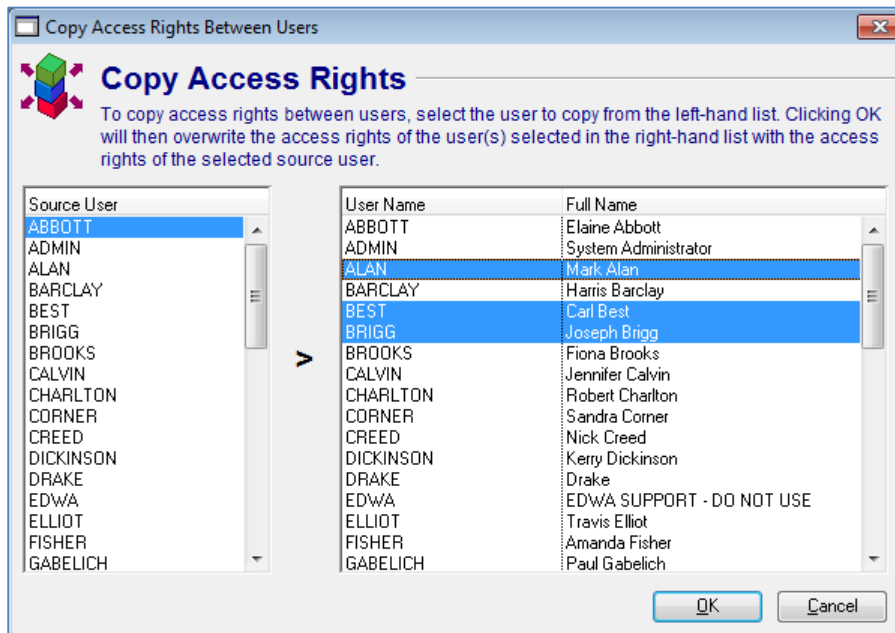
- Click **No Access**
- Click **OK**

## 6.2.2 Copying Access Rights

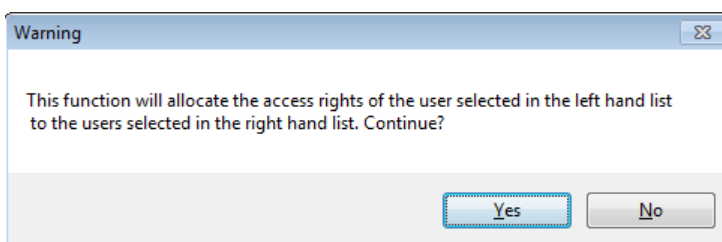
### Activity

#### General > Control > Users

- Click Copy Access Rights Between Users 
- Highlight **ABBOTT** in the left pane and **ALAN**, **BEST** and **BRIGG** in the right pane




- Click **OK**



- Click **Yes**

The users Alan, Best and Brigg now have identical access rights to the user account Abbott.

**Note: The Clone User function  allows for cloning of access between individual staff at your school. This is particularly useful when setting up a new user who will have exactly the same access rights as a user already on the system.**


**Use the Copy function  to copy access from one user across to more than one user.**

### 6.2.3 Making User Accounts Inactive

#### Activity

Angela Moore has left the school. User accounts cannot be deleted but can be made inactive.

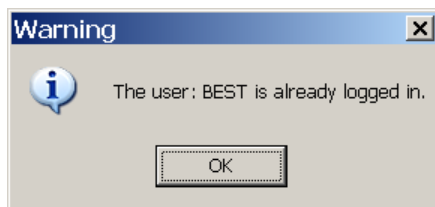
##### General > Control > Users

- Highlight the user account **MOORE** in the System Users list
- Click **Edit User** 
- Uncheck **Active**
- Click **OK**
- Uncheck **Show active accounts only**
- View inactive accounts in the list

### 6.2.4 Resetting User Accounts

#### Activity

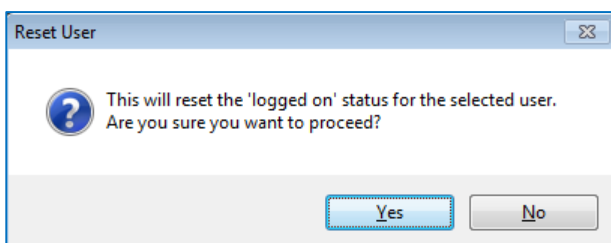
In the event of a system crash it may be necessary to reset a user's account. For example, there was a power failure when Carl Best was logged in. When he tried to log in again, the following message appeared:



Carl Best's account will need to be reset.

##### General > Control > Users

- Highlight **Carl Best** in the **Users** list
- Click **Reset User** 



- Select **Yes** to the warning message
- Close the window



## 6.2.5 Resetting All Users

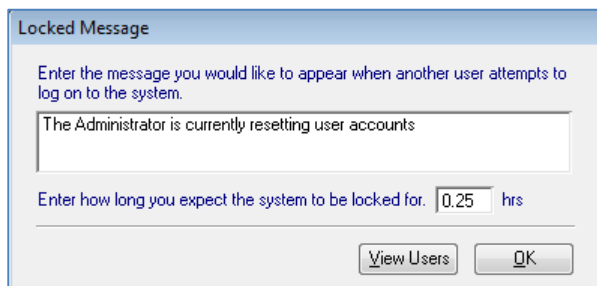
**Note:** From Integris version 6.96 the *resetallusers* function runs on the first Integris login of the day, meaning all users will be automatically reset each day.

### Activity

In some circumstances, it may be necessary to manually reset access for all users. For example, if there was a power failure and all users are locked out of the system. In this instance, it would not be possible to make a backup; however, standard backup procedures should be in place.

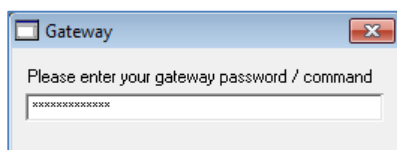
#### File > Single User Lock

- Enter the password **keys**
- Click **OK**
- View the locked message and click **OK**

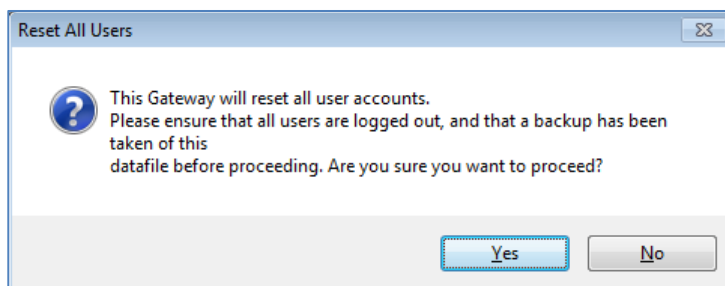


#### File > Gateway

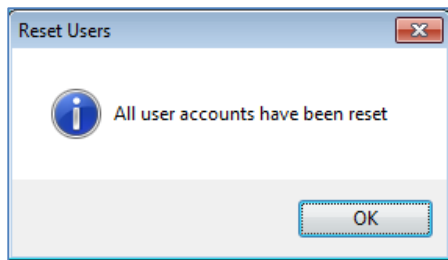
- Enter the text **resetallusers**



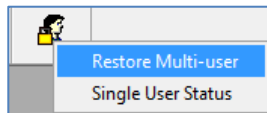
- Press **<Enter>**



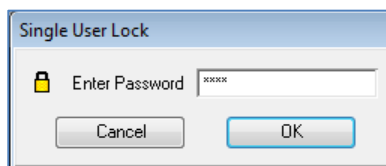
- Click **Yes**



- Click **OK**
- Restore Multi-user



- Enter the password **Keys**



- Click **OK**

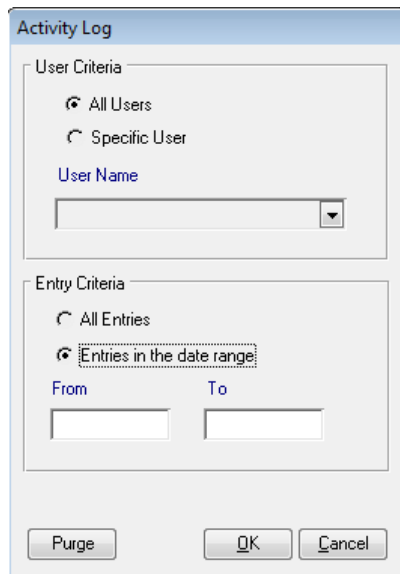
## 6.2.6 Audit

System administrators are able to print an Activity Log, detailing everything that has been done on the system.

### Activity

#### General > Control > Audit

#### Viewing the Activity Log for a Date Range



The screenshot shows a dialog box titled "Activity Log". It has two main sections: "User Criteria" and "Entry Criteria". In "User Criteria", "All Users" is selected with a radio button, and there is a "User Name" dropdown menu. In "Entry Criteria", "Entries in the date range" is selected with a radio button, and there are "From" and "To" date input fields. At the bottom, there are three buttons: "Purge", "OK", and "Cancel".

- Select **All Users** and TODAY as the date range
- Click **OK**
- Close the Activity Log

#### Purging an Activity Log (Discussion Only)

Purging the Activity Log is part of the Administration End of Year processes. This will be covered later in training. Purging an activity log removes the log entries from the system and the purged entries are then saved in an Audit log file.

Clicking **Purge**, then **Yes** to the two messages allows you to save the purged files. These files would be named Audit Log with the year and defaults to save in the Outbox.

**K: /keys/Integris/Outbox**



The screenshot shows a file save dialog box. It has two input fields: "File Name:" with the text "2018 Audit Log" and "Files of type:" with the text "\*.prn". To the right of these fields are two buttons: "Save" and "Cancel".

## 7 Student Details

### General > Student Details

Student Details display comprehensive information about each student attending the school. From the General side bar, choose Student Details. The following window will appear:

**Student**

Current

**Jackie Albert ( 766 )** **Year 4 Form Room 4**

Date of Birth: 3 OCT 2009  
Age: 9 Yrs 3 Mths  
Gender: Female  
Teacher(s): Ms J Garden  
Room:  
USI:  
UPN: E123456706004  
Student No.: 00000000  
Central ID: 99123456700000151

Address: 9 Marmion Drive, PINEY WOODS, WA, 6999  
Phone 1: 9396 7008  
Phone 2:  
Fax:  
Student Mob.:  
Family Representative: ☐  
Car Registration:  
E Mail Address: albert@iinet.net.au

**Contacts**


Name	Phone	Address	Relation	Res	Par	Mail	Emrg	Notes	Fee
Mr Paul Albert	9396 7008	9 Marmion Drive, PINEY WOODS, WA, 6	Father	Yes	Yes	No	1	Yes	N
Ms Rita Albert	9396 7008	9 Marmion Drive, PINEY WOODS, WA, 6	Mother	Yes	Yes	Yes	2	Yes	Y
Mrs Penhole	9345 6767	4 Wisdom Lane, PINEY WOODS, WA, 6	Friend	No	No	No	3	Yes	N
JENNIFER Zolter-Albert	9396 7008	9 Marmion Drive, PINEY WOODS, WA, 6	Sibling	n/a	n/a	n/a	0	No	

Res - Student Resident Par - Parental Responsibility Mail - Family Mail Marker Emrg - Emergency

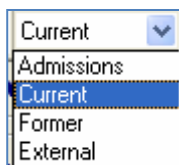
Search

Display Student Photograph

This is the summary window and displays the basic student data and a photograph of the student (where available).

Photos are accessed by clicking on Display Student Photograph  at the bottom right-hand corner of the window.

## Student Details Toolbar



This drop-down menu enables the user to decide which of the rolls they wish to view. The available options are the Admissions Roll, Current Roll, Former Roll or the External Roll.



The **Next Student** and **Previous Student** arrows on either side of the binoculars allow you to scroll through the database either forward or backward in alphabetical order.



The **Find Student** tool enables users to find individual students or groups of students based on selected criteria.

To view specific areas of a student's record use the buttons on the tool bar at the top of the Student window:



Add a new student



Edit student data



Move a student to the Former Roll



Print student details



Send a letter



Send an e-mail



Summary details



Additional details



Movement History



Attendance History



Groups



Student Activity



User-defined Information



Medical Details



Teaching Sets



Miscellaneous details



Student timetable



Cohorts









## Student Status Bar





The Student Status Bar is designed to be visible from all panes of the window, giving users a view of key student indicators at a glance.

The Status Bar is split into two sections, with the left-hand section reserved for more sensitive data. In both sections, information on the current student is displayed using icons. Hover the pointer over an icon and it will display a description of its meaning.

### Normal Bar

	Student has a flagged medical condition
	Language Background other than English
	Access restriction
	Part-time student
	Accepted (Admissions Roll)
	VET Student
	Student Notes
	Name Change

### Sensitive Status Bar

	Educational Support Program
	Excluded (Former Roll)



## Activity

- View each of the screens in Student Details

## 7.1 Locating Student Records

### General > Student Details

There are five methods of searching for students in Student Details



- Using the Previous Student/Next Student arrows
- Using Quick Search
- Making Siblings the Browse set
- Using the Find 
- Using the Advanced Find Student Search 

#### 7.1.1 Using the Previous Student/Next Student Arrows

The Previous Student/Next Student arrows are located at the top left of the Student window.

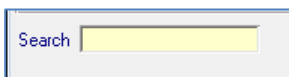


They can be used to scroll through the current browse set of students.

Click on the Next Student arrow  to move to the next student in the browse set. Click on the Previous Student arrow  to move to the previous student in the browse set.

#### 7.1.2 Quick Search

The Summary screen in Student Details provides a Simple Student Search facility to enable the user to quickly locate and load a specific student's record. It is located at the bottom left corner of the Student window.

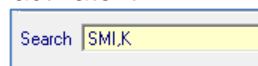
A small rectangular input field with a light blue border. Inside, the word "Search" is written in blue, followed by a yellow rectangular text input area.

The search operates on the currently defined browse set in the Student Details window. If no browse set is defined, the currently selected roll will be searched.

### Activity

#### General > Student Details

- Place your cursor in the **Search** box or tab to the field to activate it
- To search for a student Kane Smith enter the following:
- Press <**Enter**>

A small rectangular input field with a light blue border. Inside, the word "Search" is written in blue, followed by a yellow rectangular text input area containing the text "SMI,K".

The Student Details screen for Kane Smith is displayed.

- Use the **Search** to locate William Green's records
- Repeat to locate Jackie Albert's records

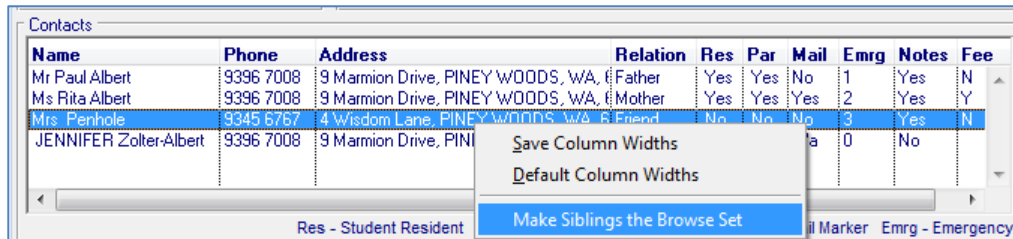
### 7.1.3 Make Siblings the Browse Set

Once a student's record is loaded and any necessary changes have been made, it is easy to create a browse set of the student's siblings so that the sibling's records can be edited. In the Contacts pane, right click and select **Make Siblings the Browse Set**.

## Activity

### General > Student Details

- Right click in the contacts pane for Jackie Albert



- Select **Make Siblings the Browse Set**



Indicates that a Browse Set (a subset of student records) has been created.

- Click Next Student

Jennifer Zolter-Albert's records will be displayed.

- Click Previous Student to return to Jackie's records
- Click and **Yes** to clear the browse set



#### 7.1.4 Find Student Function

Another method of finding a student's record is by using the standard Find Student function located at the top of the Student window.



This function is used in other sections of Administration Manager and in other Integris modules.

Use the Find Student tool to select students by a variety of different search criteria. Click on the Find Student icon and the following window appears.

Find a particular student by entering either a surname or Student Reference number in the Name/Number field. It is not necessary to enter the whole surname. Enter the first few characters and press **<Enter>**. A list of students names matching the characters entered will be displayed. Double click on the appropriate name.

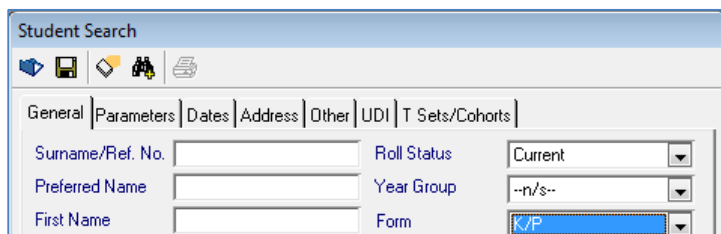
You can find individual students or groups of students by many other criteria such as year group, form, teaching set, group, previous school, indigenous status, dates (including birthdays and student's ages), addresses and user-defined information (UDI).

The system can save any search criteria you enter - this is called a Query. A query can then be used at a later date to save you setting up the search again.

## Activity

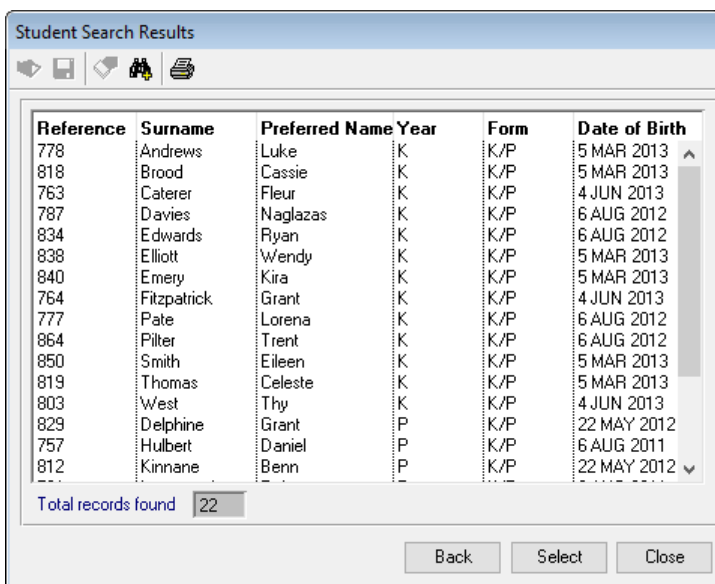
### Find the students in K/P Form

- Choose **Form: K/P** from the Year Group drop down menu



The 'Student Search' dialog box has tabs for General, Parameters, Dates, Address, Other, UDI, and T Sets/Cohorts. The 'General' tab is active, showing fields for Surname/Ref. No., Preferred Name, First Name, Roll Status (Current), Year Group (--n/s--), and Form (K/P).

- Click **Find** or **<Enter>**
- Click on the **Year** header to sort by Year level



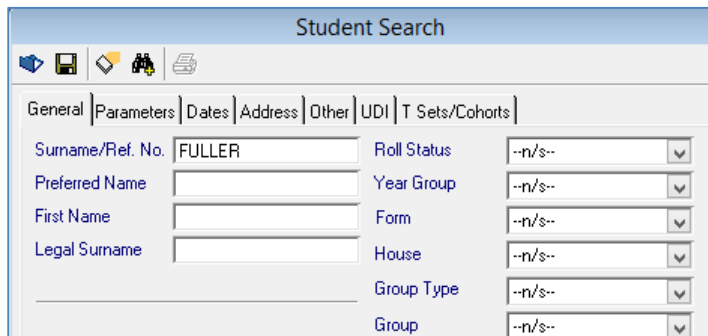
The 'Student Search Results' dialog box displays a table of search results. The table has columns for Reference, Surname, Preferred Name, Year, Form, and Date of Birth. The results are sorted by Year. At the bottom, it shows 'Total records found: 22' and buttons for Back, Select, and Close.

Reference	Surname	Preferred Name	Year	Form	Date of Birth
778	Andrews	Luke	K	K/P	5 MAR 2013
818	Brood	Cassie	K	K/P	5 MAR 2013
763	Caterer	Fleur	K	K/P	4 JUN 2013
787	Davies	Naglazas	K	K/P	6 AUG 2012
834	Edwards	Ryan	K	K/P	6 AUG 2012
838	Elliott	Wendy	K	K/P	5 MAR 2013
840	Emery	Kira	K	K/P	5 MAR 2013
764	Fitzpatrick	Grant	K	K/P	4 JUN 2013
777	Pate	Lorena	K	K/P	6 AUG 2012
864	Piliter	Trent	K	K/P	6 AUG 2012
850	Smith	Eileen	K	K/P	5 MAR 2013
819	Thomas	Celeste	K	K/P	5 MAR 2013
803	West	Thy	K	K/P	4 JUN 2013
829	Delphine	Grant	P	K/P	22 MAY 2012
757	Hulbert	Daniel	P	K/P	6 AUG 2011
812	Kinnane	Benn	P	K/P	22 MAY 2012

- Click on Print  to print a list

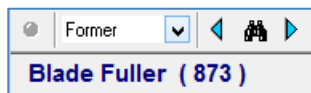
## Find students using Surname and Roll Status

- Find the student with the Surname **Fuller**
- Change the Roll Status to **n/s** to search the Admission, Current, Former and External Rolls



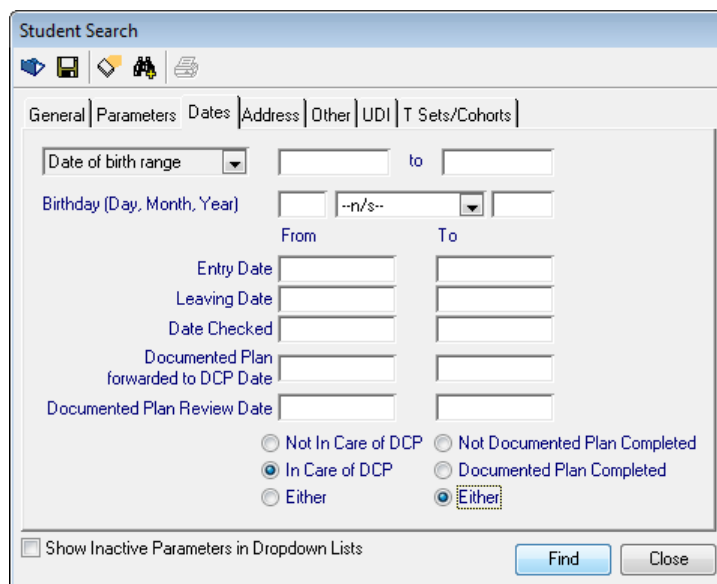
- Click **Find** or **<Enter>**


We can see he has been moved to the Former Roll



## Find students In Care of DCP

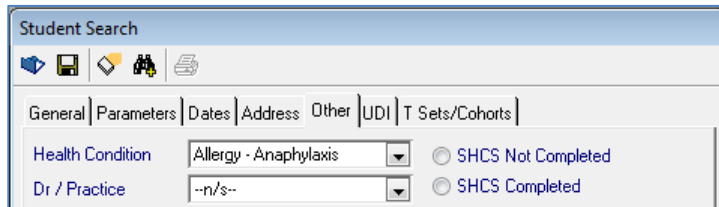
- Click on the Dates Tab



- Click **Find** or **<Enter>**
- Click **Back** and clear your settings 

## Find students with a Health Condition

- Find the students who have an **Allergy – Anaphylaxis**
- Click on the **Other** tab





Student Search

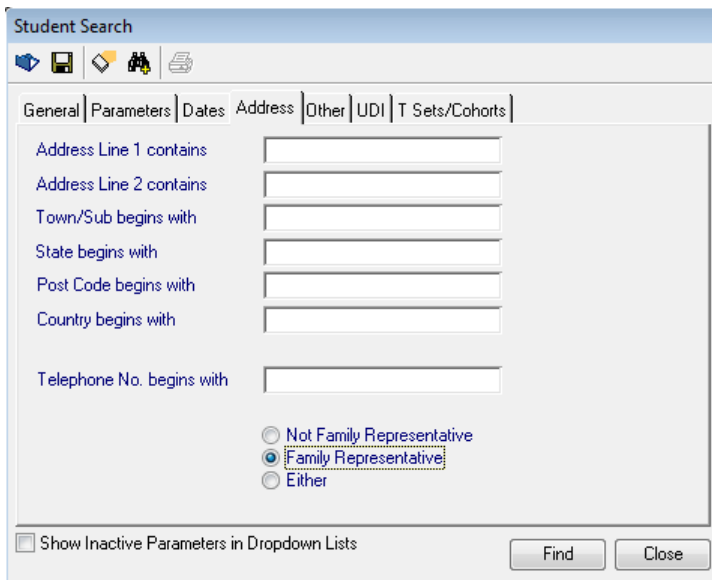
General Parameters Dates Address Other UDI T Sets/Cohorts

Health Condition Allergy - Anaphylaxis ☐ SHCS Not Completed

Dr / Practice --n/s-- ☐ SHCS Completed

- Click **Find** or **<Enter>**
- Click on Print  to print a list
- Click **Back** and clear your settings 

- Find the students who are the **Family Representatives**
- Click on the **Address** Tab



Student Search

General Parameters Dates Address Other UDI T Sets/Cohorts

Address Line 1 contains

Address Line 2 contains

Town/Sub begins with

State begins with

Post Code begins with

Country begins with

Telephone No. begins with


☐ Not Family Representative

☒ Family Representative

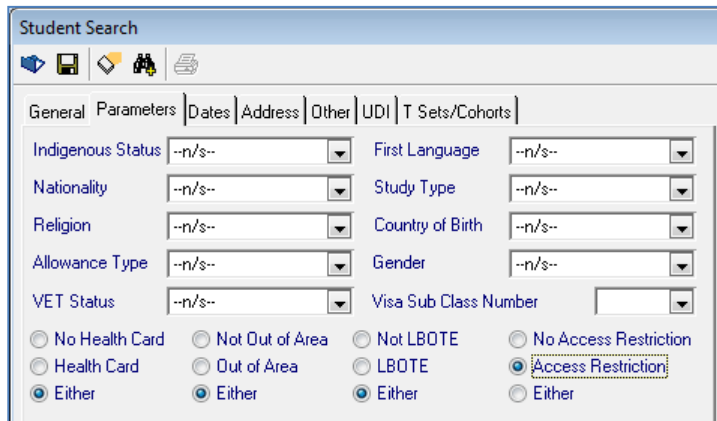
☐ Either

☐ Show Inactive Parameters in Dropdown Lists

Find Close

- Click **Find** or **<Enter>**
- Click **Back** and clear your settings 

- Find the Students with an **Access Restriction**
- Click on the **Parameters** Tab



Student Search

General Parameters Dates Address Other UDI T Sets/Cohorts

Indigenous Status --n/s-- First Language --n/s--

Nationality --n/s-- Study Type --n/s--

Religion --n/s-- Country of Birth --n/s--


Allowance Type --n/s-- Gender --n/s--

VET Status --n/s-- Visa Sub Class Number

☐ No Health Card
 ☐ Not Out of Area
 ☐ Not LBOTE
 ☐ No Access Restriction

☐ Health Card
 ☐ Out of Area
 ☐ LBOTE
 ☒ Access Restriction

☒ Either
 ☒ Either
 ☒ Either
 ☐ Either

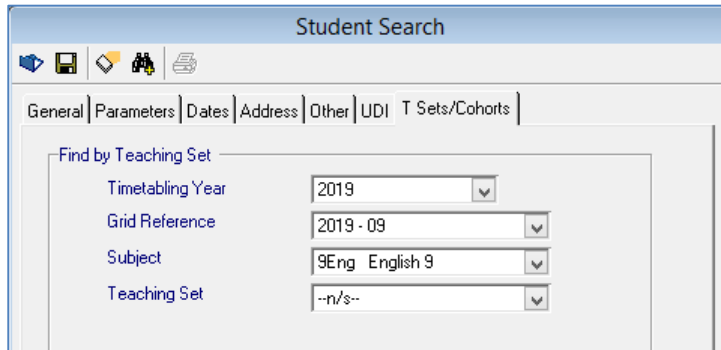
- Click **Find** or **<Enter>**
- Click **Back** and clear your settings 

## 7.1.5 Saving and Loading a Query

### Activity

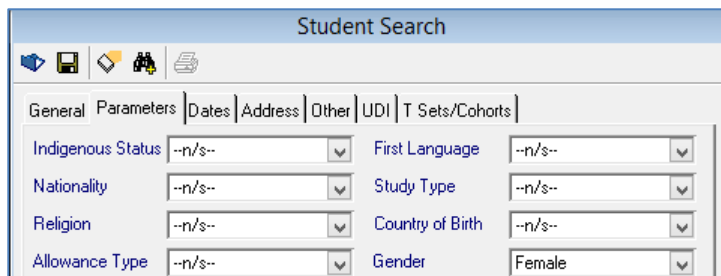
#### Find students by Teaching Set

- Find the **Female** students in **9ENG English 9**



The 'Student Search' window has tabs for General, Parameters, Dates, Address, Other, UDI, and T Sets/Cohorts. The 'Find by Teaching Set' section contains the following fields:

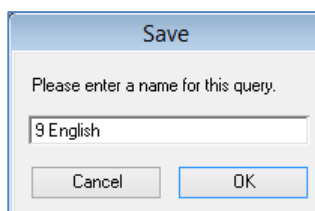
Timetabling Year	2019
Grid Reference	2019 - 09
Subject	9Eng English 9
Teaching Set	--n/s--





The 'Student Search' window has tabs for General, Parameters, Dates, Address, Other, UDI, and T Sets/Cohorts. The 'Parameters' section contains the following fields:

Indigenous Status	--n/s--	First Language	--n/s--
Nationality	--n/s--	Study Type	--n/s--
Religion	--n/s--	Country of Birth	--n/s--
Allowance Type	--n/s--	Gender	Female

- Save  this query





The 'Save' dialog box contains the text 'Please enter a name for this query.' and a text input field with '9 English' entered. There are 'Cancel' and 'OK' buttons at the bottom.

- Give it an appropriate name and click **OK**
- Click **Find** or **<Enter>**
- Close the Student Search window
- Click Find Student 
- Click View the Query List 
- Highlight **9 English**
- Click **Load** and **Find** to locate the students matching the query

### 7.1.6 Advanced Find Student Search


When searching for students, the Advanced Find Student Search tool can be used to add another student or group of students to an existing search results list.

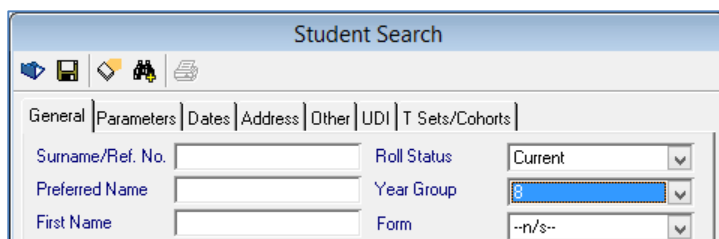
For example, a normal student search could be performed using the  tool.

Once the desired list of students is displayed, the Advanced Find Student Search tool  could be used to add more students to the existing list.

## Activity

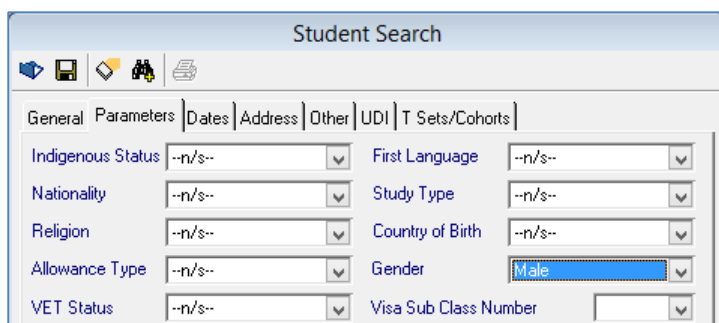
### Find the Year 8 and 9 Boys

- Click Find 
- On the **General** tab, select **Year Group: 8**



The screenshot shows the 'Student Search' window with the 'General' tab selected. The 'Year Group' dropdown menu is open, showing '8' selected. Other fields include 'Surname/Ref. No.', 'Preferred Name', 'First Name', 'Roll Status' (set to 'Current'), and 'Form' (set to '--n/s--').

- In the **Parameters** tab, select **Gender: Male**



The screenshot shows the 'Student Search' window with the 'Parameters' tab selected. The 'Gender' dropdown menu is open, showing 'Male' selected. Other fields include 'Indigenous Status', 'Nationality', 'Religion', 'Allowance Type', 'VET Status', 'First Language', 'Study Type', 'Country of Birth', and 'Visa Sub Class Number'.


- Click **Find** or **<Enter>**



**Advanced Student Find**

Use the 'Add' and 'Remove' buttons to populate the list with the students you would like to use.






Ref.	Surname	Preferred Name	Year	Form	Date of Birth
2	Alkitik	Adam	9	09.1	6 JAN 2005
6	Antonello	Mark	8	08.4	24 JUL 2005
22	Braddon	Braydie	9	09.2	15 MAR 2005
24	Broom	Declan	8	08.2	24 JUL 2005
26	Brown	Oliver	8	08.3	24 JUL 2005
31	Carless	Matthew	8	08.3	13 DEC 2005
33	Cartwright	Matthew	8	08.3	15 AUG 2005
42	Cunliffe	Aaron	9	09.3	27 OCT 2004
45	Defazio	Matthew	8	08.4	22 NOV 2005
46	Del-Prete	Brayden	8	08.1	13 DEC 2005
51	Donner	Liam	8	08.2	11 OCT 2005
52	Douglas	Mathew	9	09.2	11 MAY 2005
56	Elliott	Bryce	8	08.3	11 OCT 2005
61	Entwistle	Devyn	8	08.4	25 AUG 2005
62	Eren	Aidan	9	09.1	11 MAY 2005
67	Fawkes	Ryan	9	09.2	11 MAY 2005

Total students selected 99

 Select Cancel

- Click Advanced Find  to search for the additional students to add to the query
- Click Add Students  to find for the Year 9 boys

**Student Search**






General | Parameters | Dates | Address | Other | UDI | T Sets/Cohorts

Surname/Ref. No.  Roll Status Current

Preferred Name  Year Group 9

- Select the Parameters tab and Gender – Male

**Student Search**

General | Parameters | Dates | Address | Other | UDI | T Sets/Cohorts

Indigenous Status --n/s-- First Language --n/s--

Nationality --n/s-- Study Type --n/s--

Religion --n/s-- Country of Birth --n/s--

Allowance Type --n/s-- Gender Male

- Click **Find**, **Select** and **Yes**
- This will add the Year Nine boys to the Year 8 list




**Advanced Student Find**

Use the 'Add' and 'Remove' buttons to populate the list with the students you would like to use.

Ref.	Surname	Preferred Name	Year	Form	Date of Birth
2	Alkitab	Adam	9	09.1	6 JAN 2005
6	Antonello	Mark	8	08.4	24 JUL 2005
22	Braddon	Braydie	9	09.2	15 MAR 2005
24	Broom	Declan	8	08.2	24 JUL 2005
26	Brown	Oliver	8	08.3	24 JUL 2005
31	Carless	Matthew	8	08.3	13 DEC 2005
33	Cartwright	Matthew	8	08.3	15 AUG 2005
42	Cunliffe	Aaron	9	09.3	27 OCT 2004
45	Defazio	Matthew	8	08.4	22 NOV 2005
46	Del-Prete	Brayden	8	08.1	13 DEC 2005
51	Donner	Liam	8	08.2	11 OCT 2005
52	Douglas	Mathew	9	09.2	11 MAY 2005
56	Elliott	Bryce	8	08.3	11 OCT 2005
61	Entwistle	Devyn	8	08.4	25 AUG 2005
62	Eren	Aidan	9	09.1	11 MAY 2005
67	Fawkes	Ryan	9	09.2	11 MAY 2005

Total students selected 99








- Click on the **Form** column header to sort into Forms

**Advanced Student Find**

Use the 'Add' and 'Remove' buttons to populate the list with the students you would like to use.

Ref.	Surname	Preferred Name	Year	Form	Date of Birth
46	Del-Prete	Brayden	8	08.1	13 DEC 2005
101	Jury	Brad	8	08.1	11 OCT 2005
114	King	Jared	8	08.1	24 JUL 2005
126	Kurby	Dale	8	08.1	24 JUL 2005
156	Lucev	Michael	8	08.1	22 NOV 2005
206	Monneron	Thomas	8	08.1	27 JAN 2006
208	Moore	Gregory	8	08.1	11 OCT 2005
231	Noakes	Scott	8	08.1	13 JUN 2006
281	Pol	Louis	8	08.1	13 JUN 2006
298	Rath	Hugh	8	08.1	11 OCT 2005
874	Smith	David	8	08.1	24 JUL 2005
351	Smith-Carter	Ben	8	08.1	10 JUL 2005

- Click Print  and send the report to the screen
- Close the report
- Click **Select** and **Yes** to create a browse set of Year 8 and 9 boys
- Clear the browse set by clicking on 

**Note: There is currently no ability to save advanced searches.**

## 7.2 Entering and Maintaining Student Records

### General > Student Details

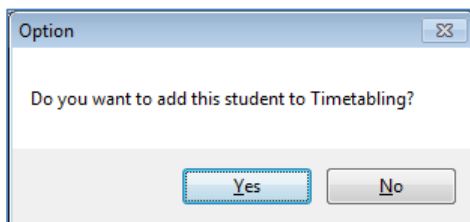
#### 7.2.1 Entering a New Student's Details



Students can also be entered onto the Current, Admissions, Former or External rolls by selecting the appropriate roll and clicking Add Student.

The minimum information the system requires is Surname, First Name, Date of Birth, Gender, Reference Number (automatically generated if Auto Number is selected in Control > Preferences > Defaults) and Entry Date. Any other information can be added at a later date by editing the record.

Where Timetabling is also loaded, the following window will appear at the conclusion of the Add Student process:




Click **No** for primary students and **Yes** for secondary students where the Timetabling module is being used. Allocate the students to a cohort. This prompt does not appear when adding students to the Admissions Roll. The Timetabler may place children on the Admissions Roll into a cohort via Timetabling > Timetable Setup.

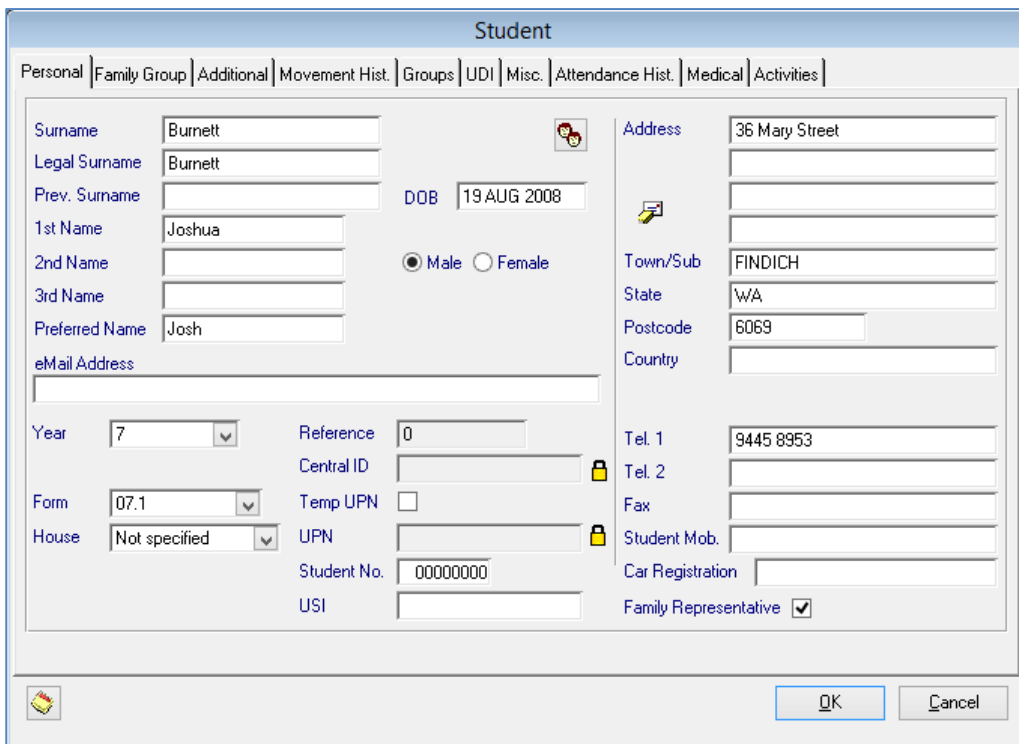
## Activity

### General > Student Details

Joshua Burnett is enrolling in West Coast High School today. Enter his details as outlined below.


Refer to Administration Manager – Supplement for Joshua’s enrolment form.

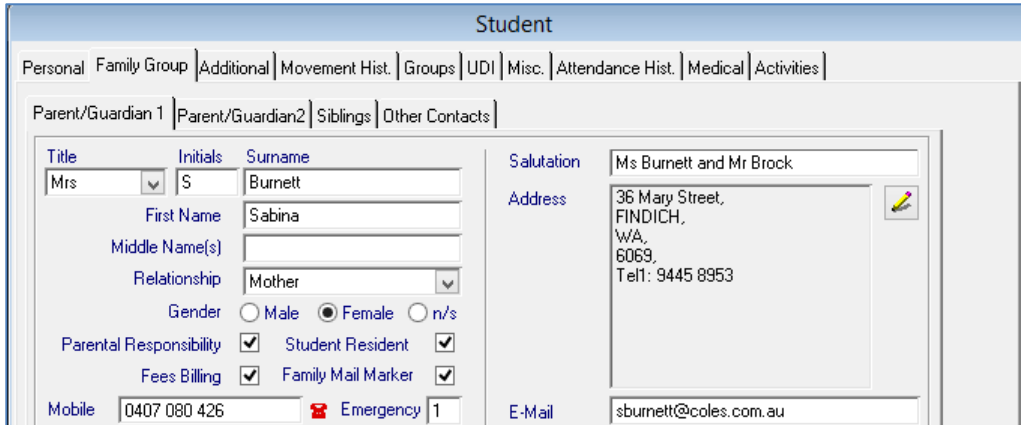
- Click Add Student 
- Type **Burnett** in the surname field and **<Tab>**
- Click **Cancel** when the **Choose siblings** window appears
- Enter Josh’s personal details from the enrolment form
- Joshua Burnett has no siblings at the school, so mark him as the **Family Representative**



- You may place him a House of your choice

## Family Group Tab

- Click the **Family Group** tab
- Enter his mother's details in **Parent/Guardian 1**
- Check the boxes for **Parent Responsibility, Student Resident, Fees Billing and Family Mail Marker**
- Click  to mark her work phone number as the Primary Contact Number.



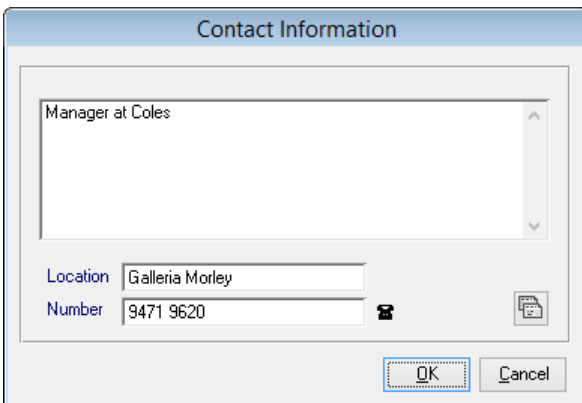
The screenshot shows the 'Student' window with the 'Family Group' tab selected. Under 'Parent/Guardian 1', the following details are entered:

Title	Initials	Surname	Salutation
Mrs	S	Burnett	Ms Burnett and Mr Brock

First Name: Sabina  
Middle Name(s):  
Relationship: Mother  
Gender: ☐ Male ☒ Female ☐ n/s  
Parental Responsibility: ☒ Student Resident: ☒  
Fees Billing: ☒ Family Mail Marker: ☒  
Mobile: 0407 080 426 Emergency: 1  
Address: 36 Mary Street, FINDICH, WA, 6069, Tel: 9445 8953  
E-Mail: sburnett@coles.com.au

**Note:** When entering the Salutation for multiple parents 'and' must be used rather than '&'.

- Click Add Notes  on the bottom right
- Enter her work information



The 'Contact Information' dialog box shows the following details:

Location	Number
Galleria Morley	9471 9620

Manager at Coles

Buttons: OK, Cancel

- Click **OK**


- Click the **Additional Details**

- Tab to enter MCCETYA (parents background information) for **Parent/Guardian 1**

## Parent Guardian 2

- Click the **Parent/Guardian 2** tab and uncheck **No Parent/Guardian 2 for this student**
- Enter the step father's information

## Other Contacts

- Select the **Other Contacts** tab and click **Add Contact** 
- Enter the Aunt's information and click **OK**
- Flag her as being emergency number **3**

**Student Contact**

Title	Initials	Surname	Address
Mrs	G	Naughton	21 Piney Lake Drive
First Name			
Georgina			
Middle Name(s)			
Relationship			
Aunt			
Gender			
<input type="radio"/> Male <input checked="" type="radio"/> Female <input type="radio"/> n/s			
Town/Sub			PINEY WOODS
State			WA
Postcode			6999
Country			
Parental responsibility			
<input type="checkbox"/> Parental responsibility <input type="checkbox"/> Student Resident			
Fee Billing			
<input type="checkbox"/> Fee Billing <input type="checkbox"/> Emergency			
Family Mail Marker			
<input type="checkbox"/> Family Mail Marker			
Salutation			
E-Mail			
Mobile			
0406 591 590			
Tel. 1			9276 3943
Tel. 2			
Fax			
Options			
<input type="radio"/> Linked to Student address			
<input type="radio"/> Linked to Parent/Guardian 1 address			
<input checked="" type="radio"/> Specific address			
			OK Cancel

## Additional Information


- Click the **Additional Information** tab and tick the **Australia Citizen/Permanent Resident** box
- Enter the additional information shown below

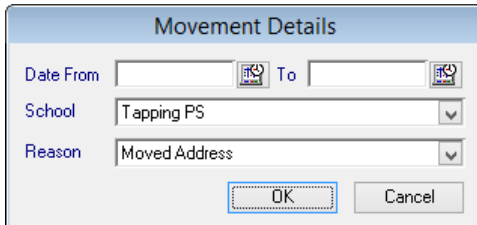
**Student**

Personal | Family Group | Additional | Movement Hist. | Groups | UDI | Misc. | Attendance Hist. | Medical | Activities

Nationality	Not specified	Australian Citizen / Permanent Resident	<input checked="" type="checkbox"/>	In Receipt of Allowance	<input type="checkbox"/>
Religion	Anglican	Allowance Type	Not specified	Visa Sub Class No.	
First Language	English	Date Arrival Australia		Int. Fee Paying	
Indigenous Status	Not Aboriginal ...	Visa Grant No.		Visa SC No. Expiry Date	
Study Type	Not specified	Birth Certificate Seen	<input checked="" type="checkbox"/>	Date Checked	Today's date
Main Lang OTE SAH	English	Country of Birth	Australia	Passport Sighted	<input type="checkbox"/>

## Movement History

- Select the **Movement History** tab and click Add 
- Enter the **To** date as last Friday
- Enter the previous **School** and **Reason**



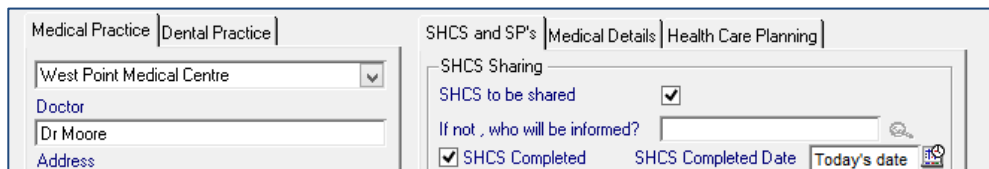
The 'Movement Details' dialog box contains the following fields:

- Date From:** A date picker icon.
- To:** A date picker icon.
- School:** A dropdown menu with 'Tapping PS' selected.
- Reason:** A dropdown menu with 'Moved Address' selected.
- Buttons:** 'OK' and 'Cancel'.

- Click **OK**

## Medical Details

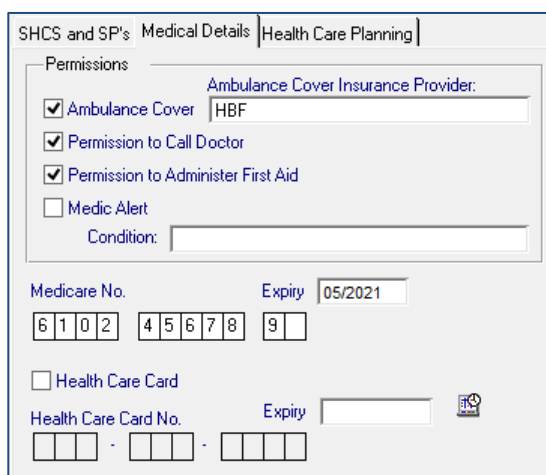
- Click the Medical tab
- Select the **Medical Practice**
- Enter the **Doctor's** Name
- Tick the **SHCS to be shared** box
- Tick the **SHCS Completed** box and add today's date



The 'Medical Details' form includes the following sections:

- Medical Practice:** A dropdown menu showing 'West Point Medical Centre'.
- Doctor:** A text field containing 'Dr Moore'.
- Address:** A text field.
- SHCS and SP's:** A section with the following options:
  - SHCS Sharing:** A section with 'SHCS to be shared' checked.
  - If not, who will be informed?:** A text field.
  - SHCS Completed:** Checked.
  - SHCS Completed Date:** A date picker showing 'Today's date'.

- Click on the **Medical Details** tab
- Enter the following details



The 'Medical Details' form - Permissions section includes the following fields:

- Permissions:** A section with the following options:
  - Ambulance Cover:** Checked.
  - Permission to Call Doctor:** Checked.
  - Permission to Administer First Aid:** Checked.
  - Medic Alert:** Unchecked.
  - Condition:** A text field.
- Ambulance Cover Insurance Provider:** A text field containing 'HBF'.
- Medicare No.:** A section with the following fields:
  - Medicare No.:** A text field containing '6102'.
  - Expiry:** A date picker showing '05/2021'.
- Health Care Card:** A section with the following fields:
  - Health Care Card No.:** A text field containing '6102'.
  - Expiry:** A date picker.

## Miscellaneous Details

- Click on the **Misc** tab
- Select the Disability, **Autistic spectrum disorder**
- Add the Detail as **Autism**
- Tick the **Evidence Provided** box and **Today's** date as the Date Checked
- Add the Vaccination Information of **Up To Date**
- Untick the **Measles Exclusion** box


Measles Exclusion ☐

Student


Personal | Family Group | Additional | Movement Hist. | Groups | UDI | Misc. | Attendance Hist. | Medical | Activities

Disabilities Information



Disability	Autistic spectrum disorder	Detail	Autism
Other Disability		Detail	
Other Disability		Detail	

 [Click here for information about funding for students with disability](#)


Immunisation Details

Evidence provided ☒ Date Checked Today's Date  Vaccination Schedule Up to date

Measles Vaccination

MMR (1st dose at 12 months)	<input type="text"/>	
MMR (2nd dose at 4 years)	<input type="text"/>	
Measles Exclusion	<input type="checkbox"/>	

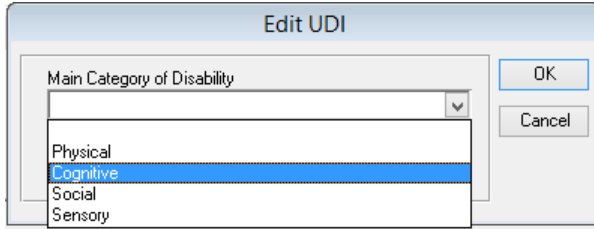
Diphtheria, Tetanus and Pertussis Vaccinations

DTPa (Immunisation completed to school entry)	<input type="checkbox"/>
DTPa (Year 7)	<input type="checkbox"/>
Date of last Tetanus vaccination	<input type="text"/> 

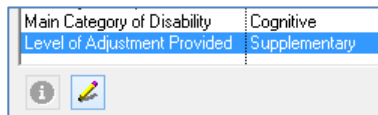


## UDI Details

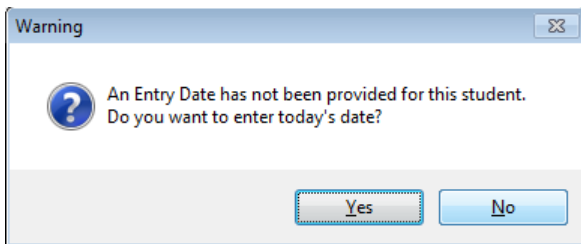
- Click on the **UDI** tab
- Double Click on the **Main Category of Disability**
- Select **Cognitive** and Click **OK**



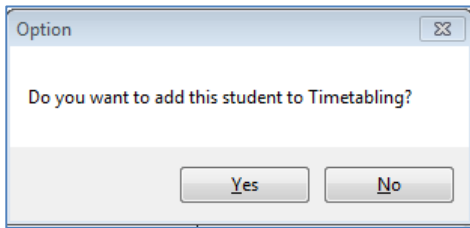
- Double Click on the **Level of Adjustment Provided UDI**



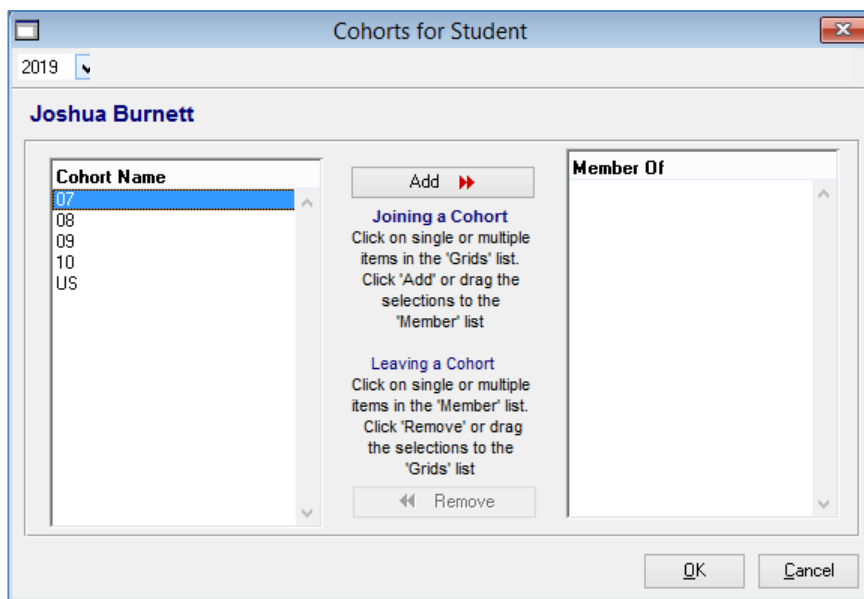
- Select **Supplementary** and Click **OK**
- Click **OK** to save



- Click **Yes** to an entry date of today



- Click **YES**, to add the student to timetabling
- Ensure you have **2019** as the current year
- Highlight **07** in the left window



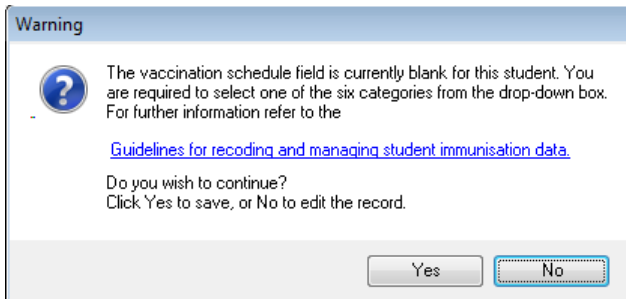
- Move to the right using
- Click **OK** to save



## 7.2.2 Immunisation Notes

Parents must provide their most recent copy of the ACIR (Australian Childhood Immunisation Register) Statement on enrolment. The school should take a copy and file this statement. If parents do not have an ACIR statement, then Not provided should be selected.

When a student has a blank Vaccination Schedule, the following message will display.



The warning message will not stop a new record from being created or stop an existing enrolment record from being edited, however it will advise the user that they must select one of the 6 options available from the Vaccination Schedule drop down list.

Clicking on the blue hyperlink will take you to the DoE website to the ***Guidelines for Recording and Managing Student Immunisation Data*** document.


### 7.2.3 Adding a Student and Copying Family Information

#### Activity

David Allen has transferred from another school. Add his details to the Current Roll with today as the Entry Date. We will be able to copy much of his data from his sisters' records.

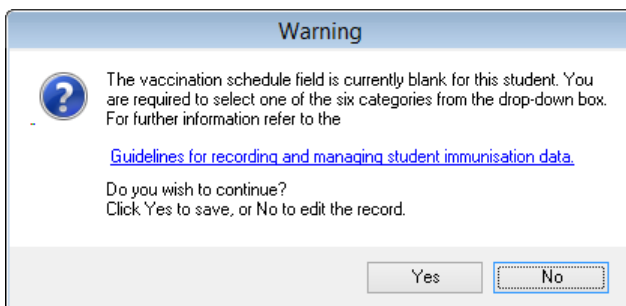
Refer to Administration Manager – Supplement for the enrolment information.

#### General > Student Details

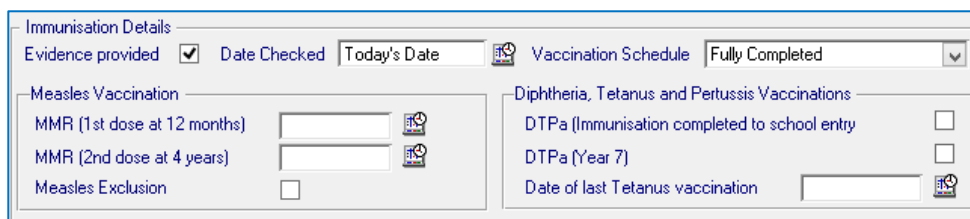
- Click Add Student 
- Type **Allen** and press <Tab>
- Highlight both **Tamara** and **Penelope Allen**
- Click **OK**
- Click **Copy Data**

Address, Family Group and Additional information from the siblings will copy to the new record.

- Enter the remaining data from the enrolment form
- Click **OK**
- View the Immunisation Warning message

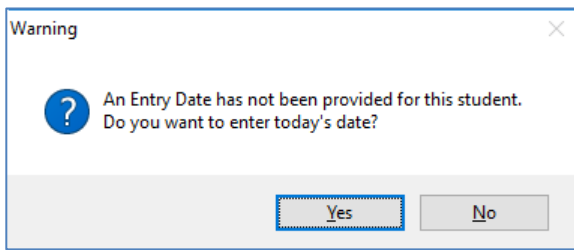


- Click **No** to continue and edit the record

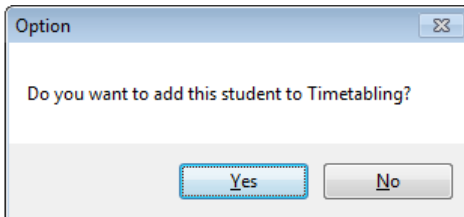
A screenshot of the "Immunisation Details" form. It has two main sections. The top section has "Evidence provided" with a checked checkbox, "Date Checked" with a date picker set to "Today's Date", and "Vaccination Schedule" with a dropdown menu set to "Fully Completed". The bottom section is divided into two columns. The left column is titled "Measles Vaccination" and contains "MMR (1st dose at 12 months)" with a date picker, "MMR (2nd dose at 4 years)" with a date picker, and "Measles Exclusion" with an unchecked checkbox. The right column is titled "Diphtheria, Tetanus and Pertussis Vaccinations" and contains "DTPa (Immunisation completed to school entry)" with an unchecked checkbox, "DTPa (Year 7)" with an unchecked checkbox, and "Date of last Tetanus vaccination" with a date picker.

- Tick the **Evidence Provided** box
- Enter **Today's Date** as **Date Checked**
- Select **Fully Completed** for the **Vaccination Schedule**
- Uncheck the **Measles Exclusion** box
- Click **OK**

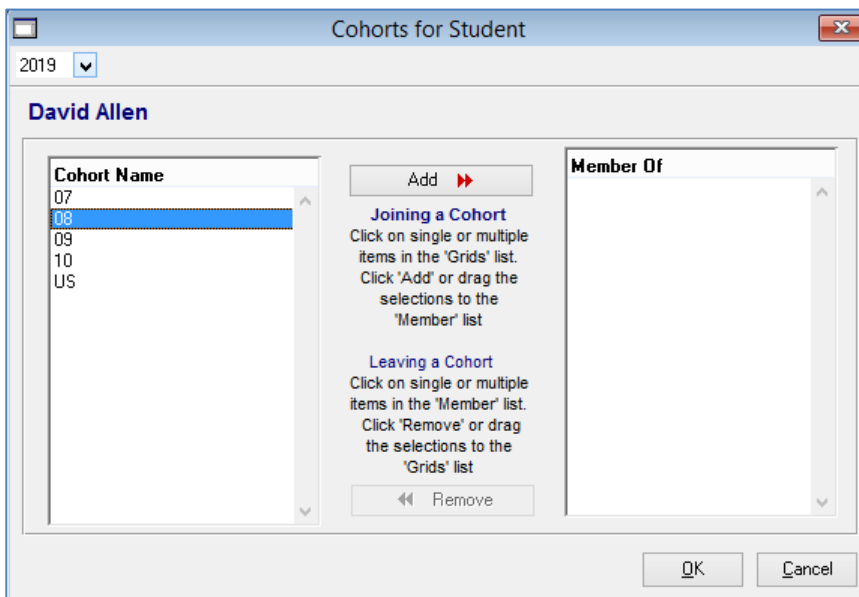
- Click Yes to the Entry Date message



- Click **Yes** to the Timetable message



- Highlight **08** and click **Add**



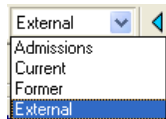
## 7.2.4 Adding a Student to the External Roll


### Activity

Justin Badely is attending PEAC at the West Coast Community College. He needs to be added to the External Roll and flagged as a part-time student.


#### General > Student Details


- Select the External Roll



- Select Add Student 
- On the **Personal** tab fill in the following information:
  - Surname: **Badely**
  - First Name: **Justin**
  - DOB: **24/3/2008**
  - Gender: **Male**
  - Year: **7**
  - Address: **125 Watershed Road, FORRESTFIELD, WA, 6587**
  - Telephone: **9658 2154**
- On the **Family Group, Parent/Guardian 1** tab fill in the following information:
  - Title: **Mr**
  - Initial: **T**
  - First Name: **Travis**
  - Relationship: **Father**
  - Gender: **Male**
  - Tick all four check boxes relating to parent information
  - Mobile Number: **0412 568 458**
  - Salutation: **Mr Badely**

- On the **Additional** tab, check **Australian Citizen/Permanent Resident**
- Set the **FTE** to **0.20**
- Select **Custom**

FTE  Part Time Status ☐ am ☐ pm ☐ n/a ☒ Custom 

- Click Assign Part Time Pattern 
- Set **Tuesday** and **Wednesday** mornings as the Attendance pattern

Part Time Pattern


Justin Badely

Attendance pattern for the week


Day	AM	PM
Monday		
Tuesday	✓	
Wednesday	✓	
Thursday		
Friday		


- Click Close
- On the Miscellaneous tab select **Not provided** for the **Vaccination Schedule**

Immunisation Details

Evidence provided ☐ Date Checked   Vaccination Schedule

Measles Vaccination

MMR (1st dose at 12 months)  


MMR (2nd dose at 4 years)  

Measles Exclusion ☐

Diphtheria, Tetanus and Pertussis Vaccinations

DTPa (Immunisation completed to school entry) ☐


DTPa (Year 7) ☐

Date of last Tetanus vaccination  

- Click **OK** to save
- Return to the **Current Roll**



## 7.2.5 Editing Students' Records

### General > Student Details

Once a student has been entered on to the database, details may be added or edited at any time. To do this, find the relevant student and click Edit Student. 

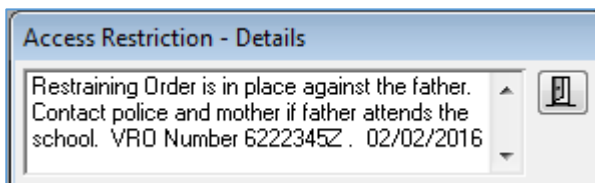
#### Activity

##### Changing a Student's Name



- Find **Clay Karman**
- Click Edit 
- Change both the **First Name** and **Preferred Name** fields to **William**
- Click **OK**
- On the student status bar, click on Name History to view the changes 

##### Entering an Access Restriction

- Find **Nicole Lively**
- Click Additional 
- Click Edit 
- Check Access Restriction, then click on  to enter details of the Access Restriction






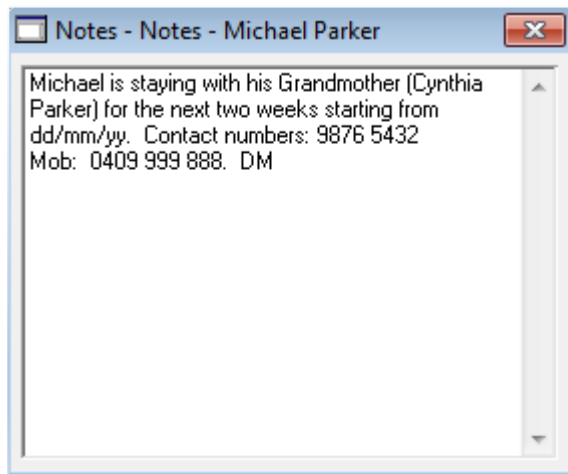
The dialog box titled "Access Restriction - Details" contains a text area with the following text: "Restraining Order is in place against the father. Contact police and mother if father attends the school. VRO Number 6222345Z . 02/02/2016". To the right of the text area is a close button icon (a square with an 'X').

- Click the  to close the details window then click **OK** to save the information entered
- Check for the Access Restriction icon  in the student status bar.



## Adding a Student Note

- Find **Michael Parker**
- Click Summary 
- Click Edit 
- Click Edit Student Notes 
- Add the note details





- Close the note and click **OK**

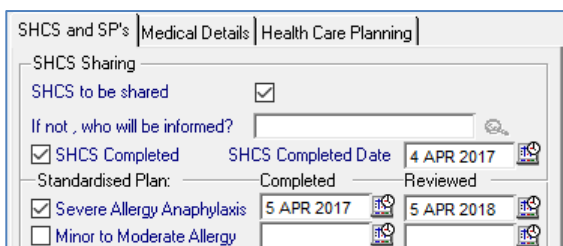
## 7.3 Medical Records


Medical Records are usually entered at Enrolment from the Student Health Care Summary Form. Records should be reviewed annually and any changes to a student's health information must be updated.

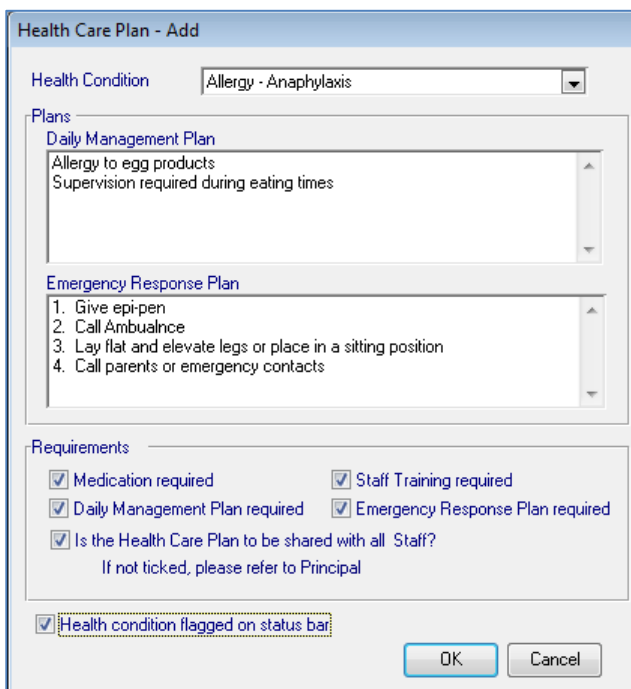
### 7.3.1 Entering and Maintaining Student Health Care Information

#### Activity

- Find **Corrina Born's** records
- Click Medical 
- Click Edit Student 
- Click **SHCS Completed** and enter today's date
- Check the box for the Standardised Plan of **Severe Allergy Anaphylaxis**





- Click on the **Health Care Planning** tab
- Click Add New Record 
- Select **Allergy - Anaphylaxis** and enter the information in the Daily Management Plan and Emergency Response Plan
- Tick the box for all 5 requirements
- Tick the box for **Health Condition Flagged on the Status Bar** and click **OK**

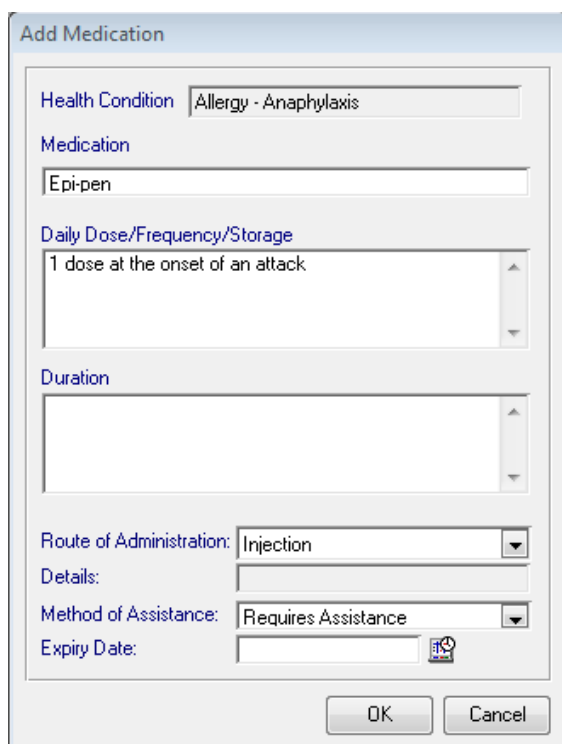


**Note: Health Care Forms are located on the Department of Education website. They can be downloaded in either “.kst” or MSWord formats. To access or download the forms, follow the link below. Some Emergency Response Plans can be copied and pasted from these forms.**

Location of Health Care Forms: Behaviour and Well Being Website

<http://www.det.wa.edu.au/studentsupport/behaviourandwellbeing/detcms/portal>

- Click Open Medication details 
- Click Add Medication 
- Enter the information pictured below as well as an Expiry Date



Click **OK**, then click 

- Click Open Staff Training details 

- Enter the **Type of training** information

**Staff Training**

Health Condition: Allergy - Anaphylaxis

Type of training:

Use of Epi-pen  
Managing Anaphylaxis

- Click Add Staff member 
- Find **Joseph Brigg** and **Elaine Abbott**

**Staff Training**

Health Condition: Allergy - Anaphylaxis

Type of training:

Use of Epi-Pens  
Managing Anaphylaxis

Authorised staff:

Ref No.	Surname	First Name	Training Date	Retraining Date
2401	Brigg	Joseph		
2400	Abbott	Elaine		

Close

- Highlight one of the staff members and click on edit 

**Edit Authorised Staff Training Dates**

Ref No.	Surname	First Name	Training Date	Retraining Date
2401	Brigg	Joseph	6 FEB 2017	6 FEB 2018
2400	Abbott	Elaine		

OK Cancel

- Enter today's date as the **Training Date** and a date one year ahead as the **Retraining Date**
- Click **OK**
- Click on **Close**
- Click **OK** to save

### 7.3.2 Medical Reports

There are several Medical Reports in Admin > Reports that can be used by schools to display Medical Information about students.

## Activity

### Admin > Reports > General Reports > Medical Details

- Sort by Year Level
- Tick all the boxes
- Click New Query and Find Select and Yes to load all students on the Current Roll

The screenshot shows the 'Reports' window with the following details:

- General Reports List:** Student Activities Report, Activities Report, Medication Report, Medical Conditions, Medical Conditions Trained Staf, **Medical Details**, Doctor/Practice List, Dental Practice List, Birthday Report, Students with no Address, Students and their Teaching Se, List of UDIs, Health Care Conditions Review.
- Titles:** Main Title: Medical Details, Page Footer: (empty).
- Sort:** List: Form, DOB, Gender. Sort Field: 1 Year. Total: (empty). Page: (empty).
- Select:** ☒ One page per student, ☒ Include Student Photograph, ☒ Only include students with 'flagged' health conditions, ☒ Include Daily Management Plan, ☒ Include Parent/Guardian 1 Details. Selected Subset: 513 ... New Query button.
- Buttons:** Print, Cancel.

- Click **Print**

**Note:** By selecting the option to 'Only include students with 'flagged' health conditions', and then selecting your whole school, this report will only print those students who have their condition flagged on the Status Bar.

## Activity

### Admin > Reports > General Reports > Medication Report

- Sort by **Form** then **Year**
- Click **New Query**
- Find **All Current** students

The screenshot shows the 'Reports' window with the 'Medication Report' selected in the left-hand tree. The right-hand pane is configured as follows:

- Titles:** Main Title is 'Medication Report', Page Footer is empty.
- Sort:** A list on the left contains 'DOB' and 'Gender'. A table on the right defines the sort order:

	Sort Field		Total	Page
1	Form	▲		
2	Year	▲		

- Select:** A dropdown menu shows 'Selected Subset 529 ...' and a 'New Query' button is next to it.

At the bottom right are 'Print' and 'Cancel' buttons.

- Click **Print**

## Activity

**Admin > Reports > General Reports > Health Care Conditions Review Date**

- Select Plans **ALL**.

The screenshot shows the 'Reports' application window. On the left is a tree view with categories like 'Medical Conditions', 'Medical Conditions Trained Staf', 'Medical Details', 'Doctor/Practice List', 'Dental Practice List', 'Birthday Report', 'Students with no Address', 'Students and their Teaching Se', 'List of UDIs', 'Health Care Conditions Review' (highlighted), 'Roll Reports', 'Form Lists', 'Check Lists', and 'Saved Check Lists'. The main area on the right contains several sections: 'Titles' with 'Main Title' set to 'Health Care Conditions Review Date' and an empty 'Page Footer' field; 'Students (optional)' with a dropdown menu and a 'New Query' button; 'Plans' with a list of conditions including 'All', 'Severe Allergy Anaphylaxis', 'Minor to Moderate Allergy', 'Diabetes', 'Seizures', 'Asthma', 'Activities of Daily Living', and 'Emergency Response Plan for Special Needs'; and 'Dates' with 'Completed Date' and 'Reviewed Date' each having 'From' and 'To' date selection fields. At the bottom right are 'Print' and 'Cancel' buttons.

- Click **Print**

**Notes: [All students with a Health Care Condition Plan will be selected for the Report]**

**Entering From and To Dates will allow filtering to include only students who have Completed Dates and Review Dates entered in the report window**

## 7.4 Student Photographs

You can add photographs to student records if the students are on the Current Roll. The photographs are not contained within the main datafile but are instead linked from a location specified within the **General > Control > Preferences**. The default path at school is: K:\Keys\Integris\Photos.

**Note: Only photographs of current roll students can be displayed.**

Scan the required photographs using a scanner and its associated software or use a digital camera to take student photos. Alternatively, you may already have the photographs saved to a disc.

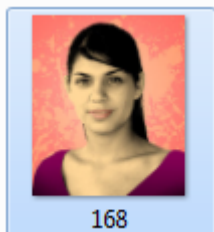
Save the photos (files) with the following structure: {student number}.{format}, for example, 324.jpg, where a student number is the same as the student reference number, and the format is the format specified on the images tab in Preferences (e.g. jpg)

**Note: Images can currently only be held in the JPG format.**

### 7.4.1 Linking a Student Photograph


#### Activity

- Navigate to **C:\Keys\Integris\Photos**
- Find file **Haylee\_Marlin.jpg**
- Right click and choose **Rename**. Type in the new filename as the reference number **168** making sure you click out of the field or press enter once the **168** is inserted.



- Close the window

#### General > Student Details

- Locate **Haylee Marlin's** records
- Click Display Student Photograph 
- Close **Student Details**

**Note: These files need to be .jpg files. On these training computers, the file extension (.jpg) is hidden.**



### 7.4.2 Student Photo Report

A Report is available in **Admin > Reports > Form Lists** that will display student photographs. Reports can be displayed by Form (default setting) or by Year Group or Student Find.

## Activity

### Admin > Reports > Form Lists > Student Photos

- Select **Form 8.1**

Sort Field	Form	Page
1	Form	

- Click **Print**

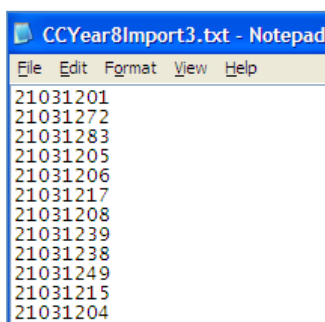
## 7.5 School Curriculum and Standards Authority (SCSA) Student Numbers

School Curriculum and Standards Authority Student Numbers (Previously Curriculum Council Numbers) can now be assigned to students up to and including Year 7's through the **Admin > Utilities** window.

A Text file can be obtained from the School Curriculum and Standards Authority (SCASA) to use in the Import Utility.

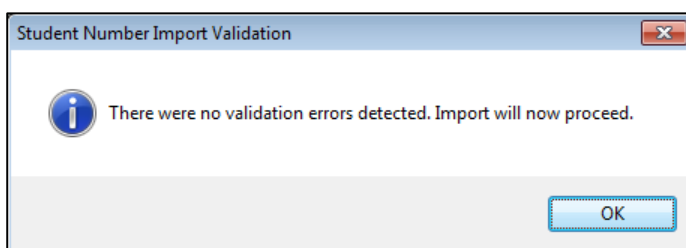
### 7.5.1 Student Numbers - Validation Information

The text file contains a list of Student Numbers to be imported. An example Student Number import file is shown in the figure below.



The selected import file has the following validation to check it meets the agreed format and follows the rules described below.

- Each line must be a numeric field of length 8 and must not start with a zero.
- Any Student in Year 7 who already has an 8-digit Student Number is ignored; the existing Student Number is retained and NOT overwritten by a number in the import file.
- If a Student Number in the import file is already assigned to a student in the data file, then that number is ignored and not assigned to another student.



Clicking OK will result in the allocation of the Student Numbers to the selected Year level.

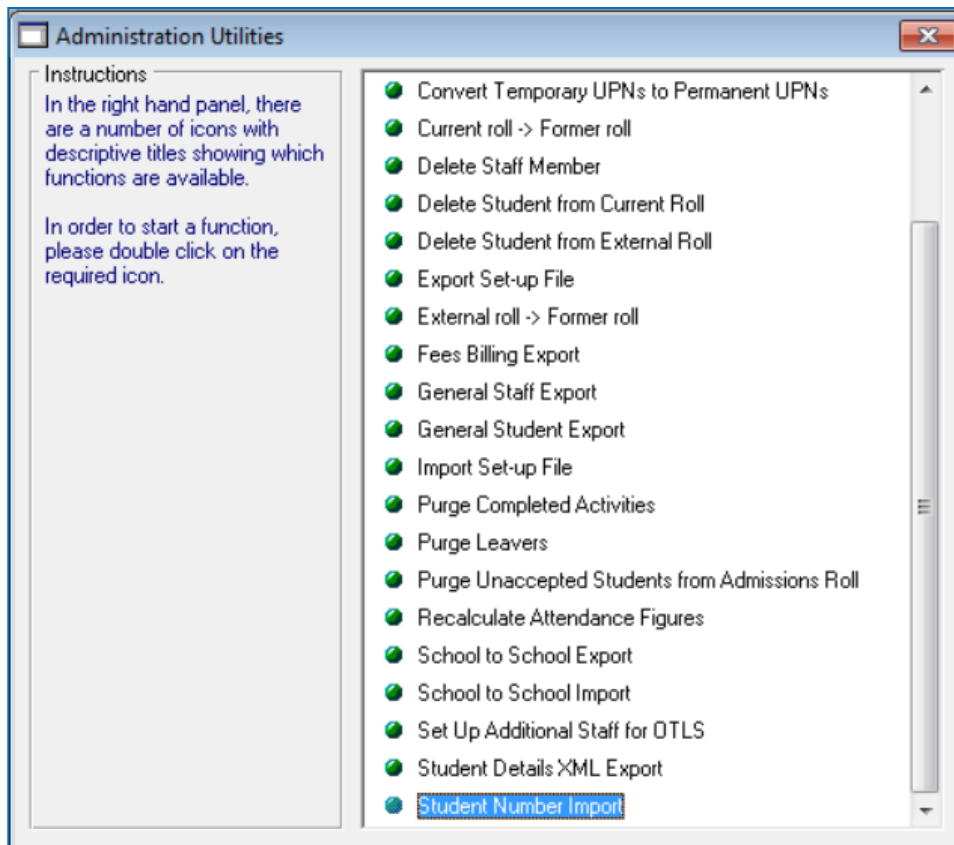
## 7.5.2 Student Number Import

Opening this Utility prompts the user to select a Year level to which the SCASA Student Numbers will be applied.

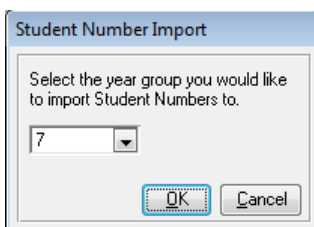
### Activity

#### Admin > Utilities > Student Number Import

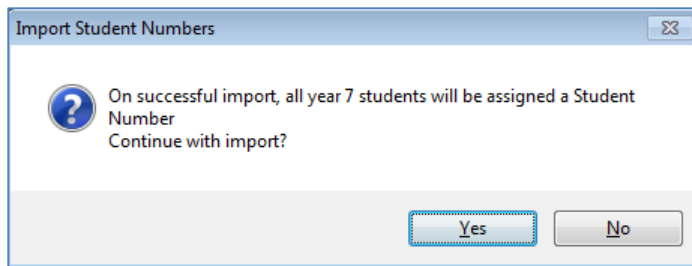
The new Year 7's and existing Year 8's do not have a SCASA Student Number



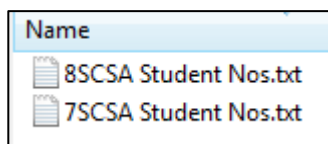
- Select **Year 7** from the drop down list



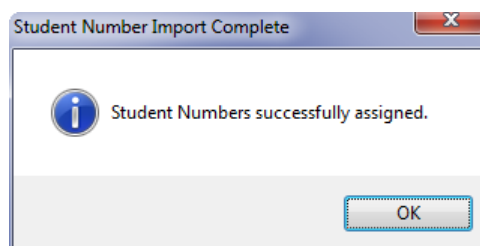
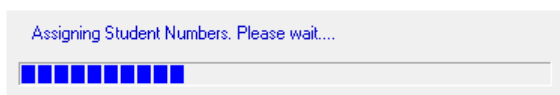
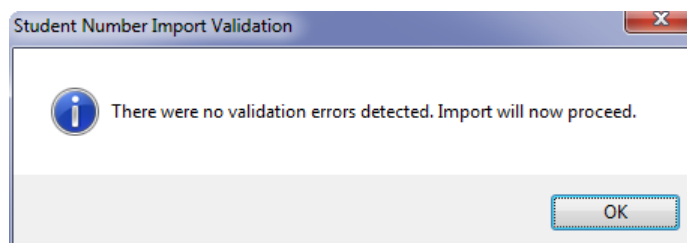
- Click **OK**



- Click **Yes**
- Navigate to **C:/keys/Integris/Inbox/StudentNos**
- Highlight the **7CCNos** text file and click **Open**



- Click **OK** to the Validation message



- Click **OK**
- Repeat for the Year 8's
- View the Year 7's and Year 8's SCASA Student Numbers through **Student Details**

**Note: Secondary schools will need to import both Year 7 and Year 8 SCASA numbers**

## 7.6 Student Emergency Contact

The Emergency button can be used to quickly display all relevant information on a student or staff member in the event of an emergency.

Located in the top left-hand corner of the screen and present at all times the software is open, you will see the two Emergency Contact buttons for Students and Staff.



Click on an icon to load the standard Search window, enter a student or staff member's name and load their data. The **Emergency Contact** window will open. The following example is for a student.

The screenshot shows the 'Emergency Contact' window for Jackie Albert (766). The window is divided into several sections. At the top, it displays the student's name, gender (Female), date of birth (3 OCT 2009), year (Year 4), and form room (Form Room 4). Below this, there are two main columns. The left column contains contact information for the student's father, Mr Paul Albert, including his name, address (9 Marmion Drive, PINEY WOODS, WA, 6999), salutation (Mr & Mrs Albert), and phone numbers (Tel. 1: 9396 7008, Tel. 2: 9396 7008, Mobile: 9396 7008, Fax: 9396 7008, E-Mail: Albert@ozemail.com.au). The right column contains medical information, including the doctor's name (Dr Pi Peng), medical practice (Carepoint Medical Centre), address (18 Andrews Road, EAST PERTH WA 6032), and phone numbers (Tel. 1: 9226 7845, Tel. 2: 9226 7845, Fax: 9220 1545). There are also checkboxes for 'Permission to call Doctor' and 'Permission to administer First Aid', both of which are checked. Below the contact information, there is a section for 'Medical Description' with a list of conditions: 'Asthma' (highlighted), 'Allergy - Other', and 'Emergency Procedure'. The 'Emergency Procedure' section contains text: 'Without delay give 4 separate puffs of a reliever. Wait 4 minutes. If little or no improvement, repeat steps. If there is still little or no improvement, call an ambulance (Dial 000). Continuously repeat steps 2 and 3 while waiting for the ambulance.' At the bottom of the window, there are 'Print' and 'Close' buttons.

Emergency Contact	
<b>Jackie Albert (766)</b> <span style="float: right;"><b>Year 4 Form Room 4</b></span>	
Female	Date of Birth 3 OCT 2009 <span style="float: right;">Age 9 Yrs 4 Mths</span>
Contact No: 1	
Name:	Mr Paul Albert (Father)
Address	9 Marmion Drive, PINEY WOODS, WA, 6999
Salutation	Mr & Mrs Albert
Tel. 1	9396 7008
Tel. 2	9396 7008
Mobile	
Fax	
E-Mail	Albert@ozemail.com.au
Doctor / Medical Practice	Dr Pi Peng Carepoint Medical Centre <input checked="" type="checkbox"/> Permission to call Doctor <input checked="" type="checkbox"/> Permission to administer First Aid
Address	18 Andrews Road EAST PERTH WA 6032
Tel. 1	9226 7845
Tel. 2	
Fax	9220 1545
	<input checked="" type="checkbox"/> Ambulance Cover
	Ambulance Cover Insurance Provider
Medical Description	Emergency Procedure
Asthma	Without delay give 4 separate puffs of a reliever. Wait 4 minutes. If little or no improvement, repeat steps. If there is still little or no improvement, call an ambulance (Dial 000). Continuously repeat steps 2 and 3 while waiting for the ambulance.
Allergy - Other	
Print	Close

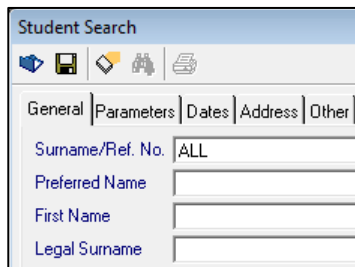
Student emergency information can also be accessed via the Emergency icon on the Admin sidebar.

## 7.6.1 Viewing and Printing Emergency Contact Information



### Activity

#### Print emergency details for Penelope Allen




- Click Student Emergency Contact 
- Enter **ALL** in the **Surname/Ref. No.** field and click **Find**



The screenshot shows a 'Student Search' window with a toolbar at the top containing icons for search, save, delete, and print. Below the toolbar are tabs for 'General', 'Parameters', 'Dates', 'Address', and 'Other'. The 'General' tab is active, showing four input fields: 'Surname/Ref. No.' with the value 'ALL', 'Preferred Name', 'First Name', and 'Legal Surname'.

- Highlight **Penelope Allen** and click **Select**
- Scroll through the Contacts using  
- **Print** the report to the screen
- Close the print screen and Emergency Contacts

#### Print emergency details for a Staff Member

- Click Staff Emergency Contact 
- Enter **Your Surname** in the **Surname/Ref. No.** field and click **Find**
- Scroll through the Contacts using  
- **Print** the report to the screen
- Close the print screen and Emergency Contacts

## 8 The Admissions Roll

During the course of the year, it will be necessary to enter details for students who may be admitted to your school at any time in the future. These students are entered on the **Admissions Roll**. This can be done in one of three ways.

### Entering Data Directly onto the Admissions Roll

To enter admissions in this way, select the **Admissions Roll** in Student Details. Click on the Add Student button and enter data in the normal way.

### Entering Minimal Data via the Admissions Batch System

Admissions can also be entered via the batch system. This is a fast way to enter only the most basic information required for each admission. It is seldom used as it enables so little data to be entered.

Admission No	First Name	Surname
26	Hamish	Angus
34	Adrian	Baverstock
37	Valentine	Antonello
38	Krystle	Farmer
44	Susan	Ramsden

### Advanced Admissions Entry (from Admissions Batch screen)

This function enables users to rapidly enter much of an Admissions student's data, by tabbing through all the fields.

Personal Info.	Parent/Guardian 1	Parent/Guardian 2	Emergency Contact	Additional Info.	Immunisation/Medical/New Details
Surname					
Prev. Surname					
1st Name					
2nd Name					
3rd Name					
Preferred Name					
Address					
Town/Sub	PINEY WOODS				
State	WA				
Postcode	6000				

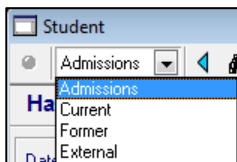
## 8.1 Admissions Roll


Madeline Crean is enrolling for next term. Her half-sister Helen Baverstock is already enrolled at the school. We can enter Madeline on the Admissions Roll and copy her data from her half-sister Helen.

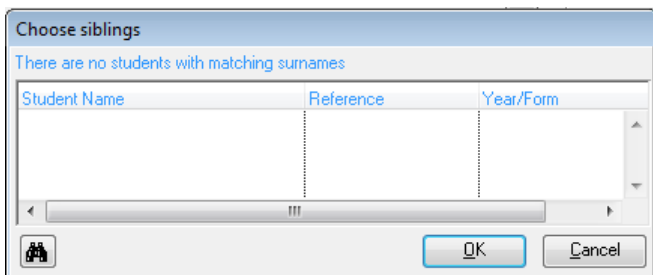
### Activity

#### General > Student Details

- Select the Admissions Roll



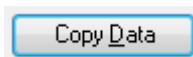
- Click 
- Enter **Madeline Crean's** last name in the **Surname** field
- Press **<Tab>** to move between the fields and the **Choose Sibling** window will display



- Use Student Find  to locate **Helen Baverstock**

General	Parameters	Dates	Address	Other
Surname/Ref. No.		BAVERSTOCK		
Preferred Name				

- Copy Helen Baverstock's details using





**Clone Sibling Data**

Copy FROM: **Helen Baverstock (7/07/08)** Information that has been checked will be copied to the newly added student (existing values will be replaced)

Student Address: 12 St. Etienne Gardens, ☒

Postcode: 6008 Phone 1: 9222 8754

Religion: ☒ Medical Practice: East Perth Medical Centre ☒

House: Green ☒ Doctor: Dr Carrera ☒

Health Card: NO ☒

Parent/Guardian 1: Mrs Hazel Baverstock  
 Relation: Mother Par: YES Res: YES Mail: YES Emrg: 1

Parent/Guardian 2: Mr Ron Baverstock  
 Relation: Father Par: YES Res: NO Mail: YES Emrg: 2

Other Contacts:

Name	Relation	Par	Res	Emrg
Mr Abe Steinway	Neighbour			3

- Enter her **First Name**
- Enter her **Date of Birth** and **Gender**
- Enter her **Year**
- Click **OK** to move her from one Lesson Attendance Period Structure to another
- Enter her **Form Room** as **07.1**
- Tick the **Accepted** box

**Student**

Personal | Family Group | Additional | Movement Hist. | Groups | UDI | Misc. | Attendance Hist. | Medical | Activities

Surname: Crean Address: 12 St. Etienne Gardens

Legal Surname: Crean

Prev. Surname: DOB: 24 JUL 2008

1st Name: Madeline

2nd Name: ☐ Male ☒ Female

3rd Name: Town/Sub: WEST PERTH

Preferred Name: Madeline State: WA

eMail Address: Postcode: 6008

Country:

Year: 7 Reference: 0

Form: 07.1 Central ID:

House: Green Awaiting Notification of UPN: ☐

☒ Accepted? UPN: Student No.: 00000000

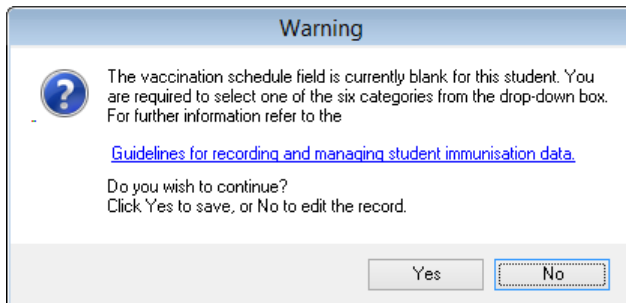
USI: Tel. 1: 9222 8754

Tel. 2: Fax: Student Mob.: Car Registration: Family Representative: ☐

- Click the **Additional** tab, check **Australian Citizen/Permanent Resident**



- Click **OK**

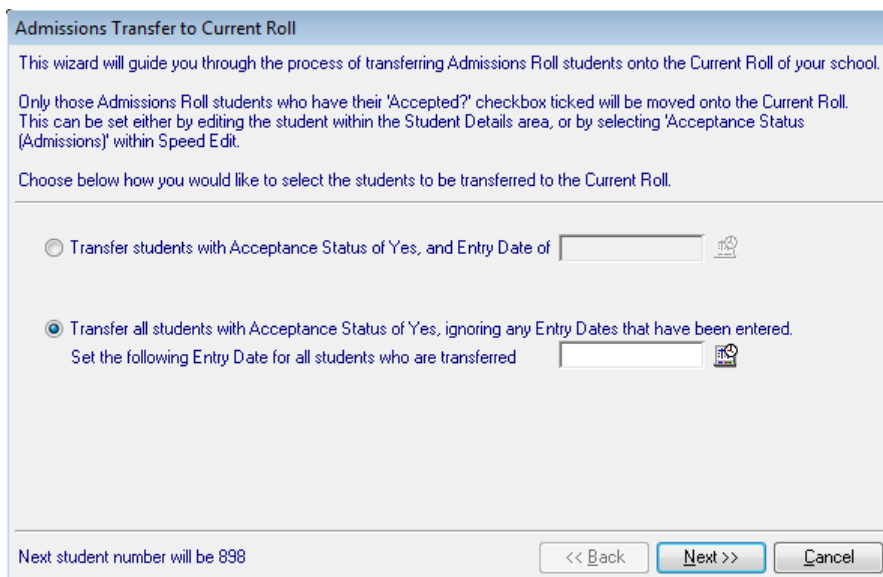


- Click **Yes** to Save without entering the Vaccination Schedule

## Admin > Utilities

Madeline has now arrived at school, so we will transfer her to the Current Roll

- Double-click Admissions Transfer → Current Roll



- Select the second option (ignoring Entry Dates) and leave today as the entry date.
- Click **Next**

**Notes:** If Option one is selected, only those accepted Admissions students whose Entry Date matches the date of entry will be transferred to the current roll.

**If the second option is selected, ALL accepted Admissions students will be transferred to the Current Roll and any Entry Date previously entered will be ignored and be replaced by the date entered in this window.**

**Admissions Transfer to Current Roll**

The following students will be transferred to the Current Roll.


If any students are listed below who you do not want to transfer to the Current Roll, select them within the list and click on the **X** button.

Ref.	Name	DOB	Gender	UPN	Entry Date	Transfer?
47	Madeline Crean	24 JUL 2008	Female			<input checked="" type="checkbox"/> <input type="checkbox"/>

Next student number will be 898

- Click **Finish**

**Admissions Transfer**


**Transfer complete**

- Click **OK** to the **Transfer Complete** message

**Delete batches**

Do you wish to check for empty batches?

- Click **No** as you do not wish to check for Empty Batches

**Note: Speed Edit may be used to edit Acceptance Status (Admissions) for more than one student.**

## 9 The Former Roll

Students may be moved from the Current to the Former roll individually or in groups.

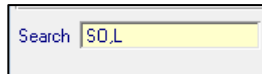
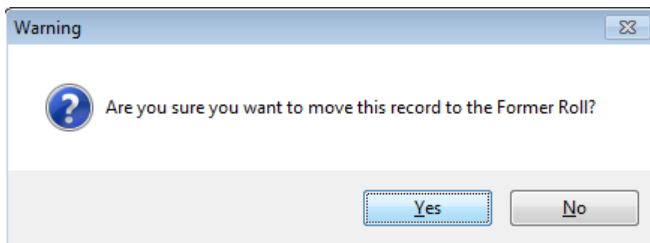
### 9.1 Moving an Individual Student to the Former Roll

#### Activity

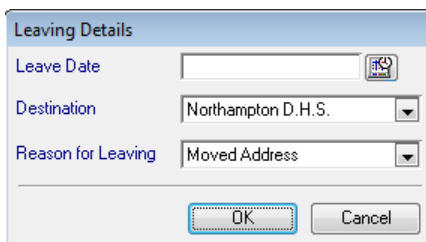
Linda So is leaving the school today.

##### General > Student Details

- Use **Search** to find Linda So
- Click on Move Student to Former Roll

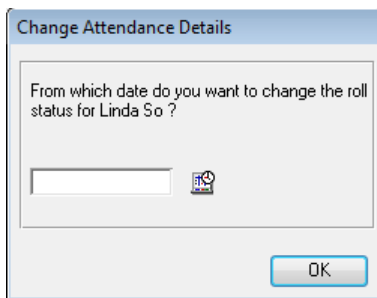
A search box with the text 'SOL' entered. The box has a yellow background and a magnifying glass icon on the right.

- Click **Yes**
- Leave the **Leave Date** as TODAY and enter the following details for **Destination** and **Reason for Leaving**

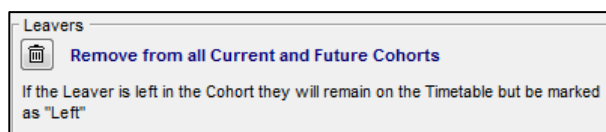
A 'Leaving Details' dialog box with a blue header bar. It contains three fields: 'Leave Date' with a calendar icon, 'Destination' with a dropdown menu showing 'Northampton D.H.S.', and 'Reason for Leaving' with a dropdown menu showing 'Moved Address'. There are 'OK' and 'Cancel' buttons at the bottom.

- Click **OK**

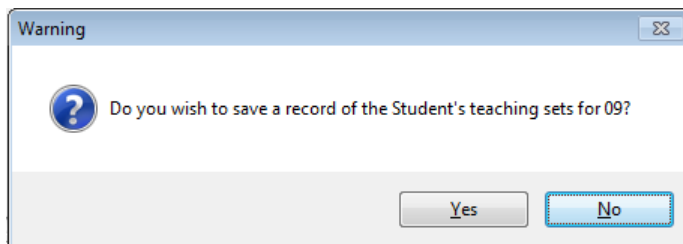
- Select TODAY'S date for changes to the roll status



- Click **OK**
- Remove her from her cohorts by clicking



Where students are enrolled in classes (Teaching Sets) in the timetable the following message will display.



- Click **Yes**

**Note: Removing students from their cohorts in this way, enables the Timetabling module to keep a record of their teaching sets. This report can be accessed in Timetabling > Reports > O&M Reports-Students > Re-admissions Form**

Linda's records have now been moved to the Former Roll.

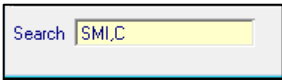
## 9.2 Moving Groups of Students to the Former Roll

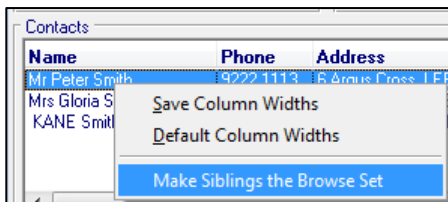
If several students are leaving the school (for example, a family group) it is faster to use the 'Current Roll to Former Roll' utility.

### Activity

Cameron and Kane Smith are moving to Jurien DHS. Move them to the Former Roll.

#### General > Student Details

- Use **Search**  to locate Cameron's details
- Right click in the **Contacts** pane and select **Make Siblings the Browse Set**

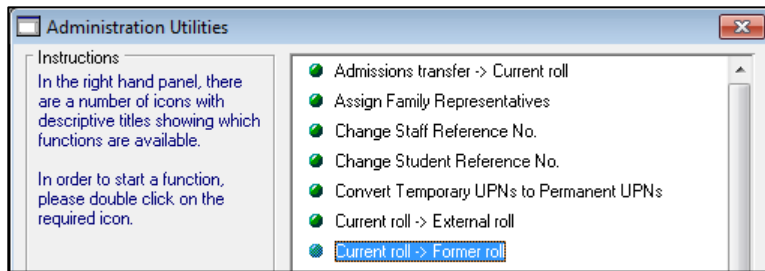


- Click Edit 
- On the **Additional** tab, enter a **Leave Date** of TODAY and the destination of **Jurien DHS**

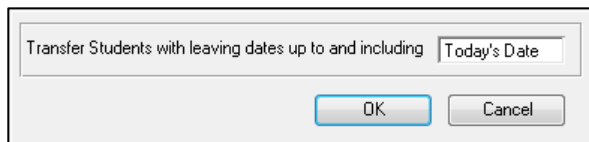
Entry Date	29 JUL 2015	Prev. School	
Leave Date	Today	Destination	Jurien D.H.S. 
Records Sent		Attendance	Current (Single registr...)

- Click **OK**
- Scroll to **Kane's** records
- Enter the same details in his records
- Close Student Details

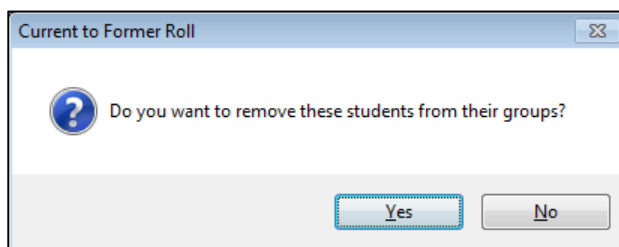
## Admin > Utilities



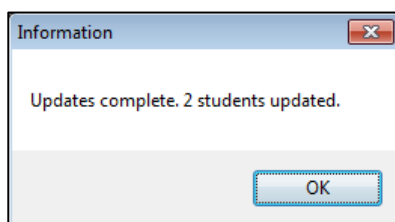
- Double-click **Current Roll → Former Roll**



- Enter TODAY'S date as the student's Leave Date
- Click **OK**
- Click **Yes** to remove them with today's date



- Click **Yes**



- Click **OK**

## General > Student Details

- Locate Cameron and Kane Smith on the Former Roll

**Note: Removing Students in this way does not allow users to save a copy of a student's Teaching Sets.**

## 9.3 Reinstating Former Students

To work with former students you must first select **Former** from the drop-down roll menu at the top left of the **Student** window. This will display only Former student's records. If you are using the Student Find to locate a student on the Former Roll, remember to select **Former** in the **Roll Status** field when entering your search criteria.





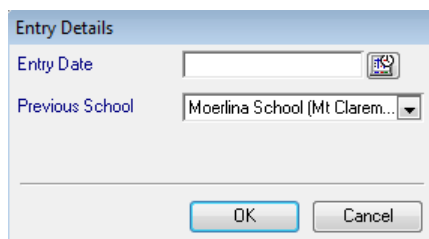
If you wish to reinstate a student who has been transferred to the Former Roll, you can do this by clicking Reinstatement Student to Current Roll.

### Activity

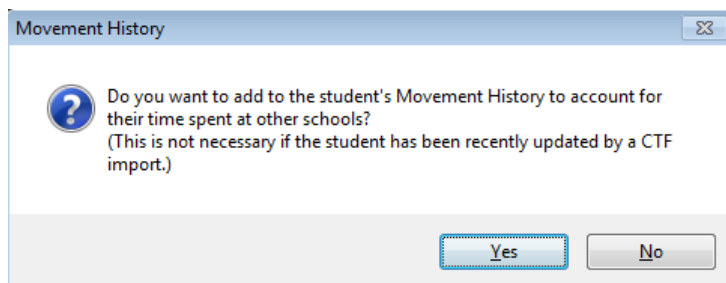
#### General > Student Details > Former Roll

**Leif Campbell is transferring back to the school from Moerlina School.**

- Find his records on the **Former** Roll
- Click Edit 
- Update his **Year** to **4** and his **Form** to **Room 4**
- Click **OK**
- Click on Reinstatement Student to Current Roll 
- Click **Yes** to confirm that you wish to reinstate him
- Click **Yes** to confirm his year and form to re-enter
- Enter his **Entry Date** as TODAY
- Leave his **Previous School** as **Moerlina PS**



- Click **OK**



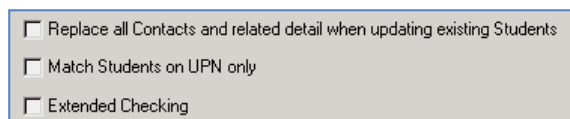
- Click **Yes**
- Select **No**, as we will not be adding Leif to the Timetabling Module
- View **Leif's** details on the **Current** Roll



## 10 Exporting and Importing Student Data

It is possible to electronically export and import student data without losing any information or the information being overwritten.

When student data is received from another school, you are given options regarding the retention of the data that already exists in your datafile. There are three checkboxes available in the Import Transfer File window. These determine how the data is matched to student records that exist in the datafile, as well as what data is retained or overwritten according to the selections made.



☐ Replace all Contacts and related detail when updating existing Students

☐ Match Students on UPN only

☐ Extended Checking

**Replace all Contacts and related detail when updating existing Students** – recommend leaving this un-checked. If the student already exists in the datafile, it is unlikely that the details in the import file are more current than those in your datafile, unless the student has been reinstated from the Former Roll and not had their contact details updated.

**Match Students on UPN only** – recommend leaving this unchecked.

**Extended Checking** – recommend checking this box. This function will look for similarities between student records based on a combination of gender, date of birth, the first two letters of the first name and the first two letters of the surname. When a potential duplicate has been found, the Extended Checking window will display. The window provides the user with options for importing or rejecting the student record. During processing, an activity log displays the progress of the import of each record. The activity log can be saved or printed.

Student data can be transferred from primary to secondary schools well before the end of the academic year. This enables the secondary school to undertake activities associated with the creation of the following year's timetable and in producing a charges and contributions sheet.

In all cases, students should be enrolled onto the Admissions Roll and then transferred to the Current Roll upon arrival at the destination school. The exception to this rule is only if the student already exists in the datafile, either on the Former or Current Roll

### Items in the Transfer File include:

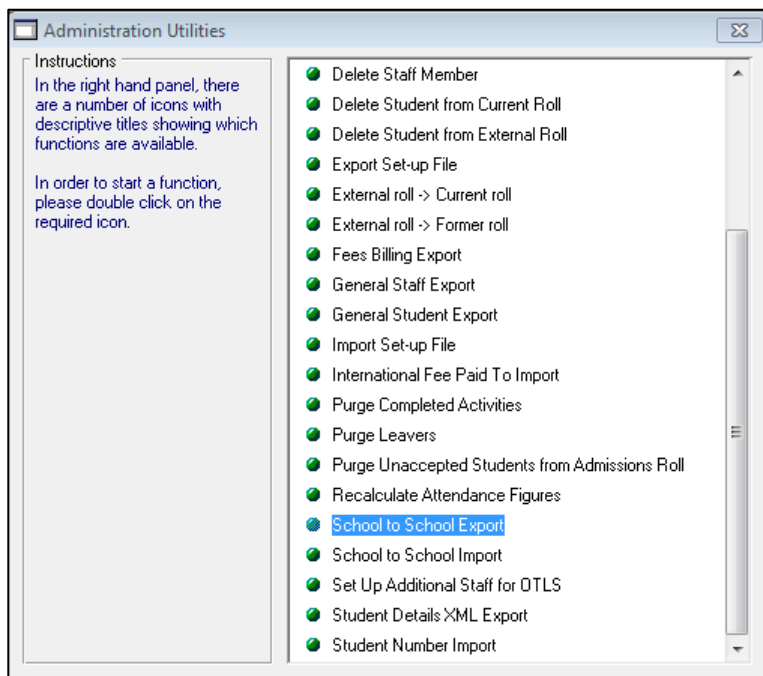
- Student personal details (entry date, address, DOB, etc)
- Student additional information (Indigenous Status, religion etc.)
- Medical information (sensitive information is not included and a message is displayed indicating the student has a flagged medical condition)
- Contact details for parents and emergency contacts
- Previous school (if entered when importing the data)
- Behaviour records (If using the XML Export Utility, schools may elect to export **ALL Behaviour Records** or only those marked as **Retain on Transfer**) These records will be in Grey in the Behaviour Management screen for the student
- Attendance records summary

**Note: Student Photos are not included in the Import/Export process.**

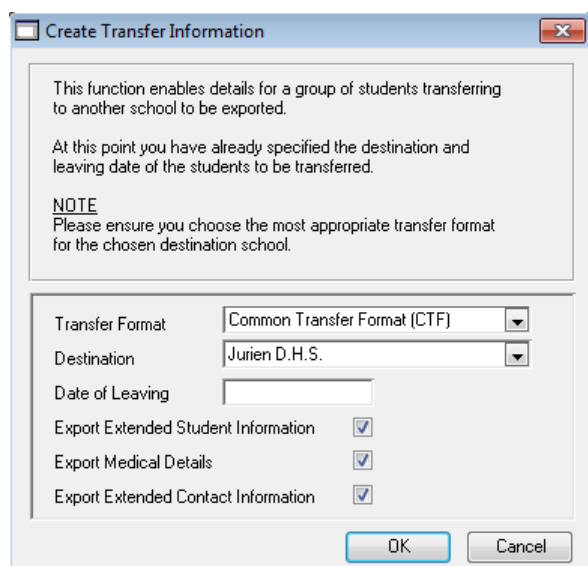
## 10.1 Exporting Student Data

### Activity

#### Admin > Utilities > School to School Export

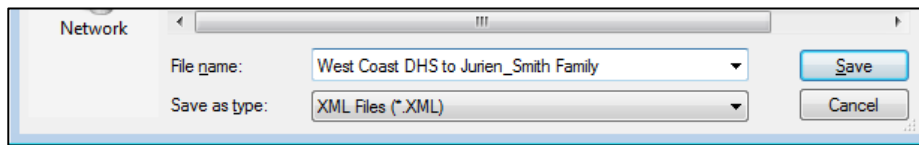


- Enter the Destination of **Jurien DHS** and TODAY as the **Date of Leaving**
- Check each of the export options



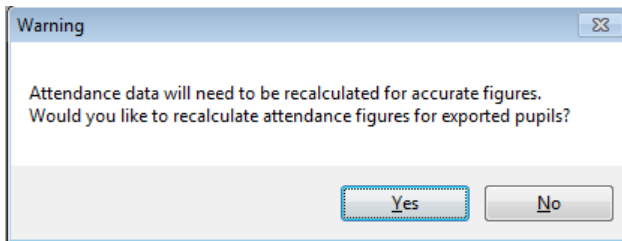
- Click **OK**

- Give the export file a name, for example **West Coast DHS to Jurien DHS\_Smith family**

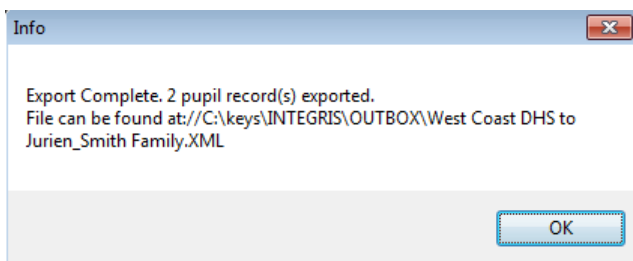
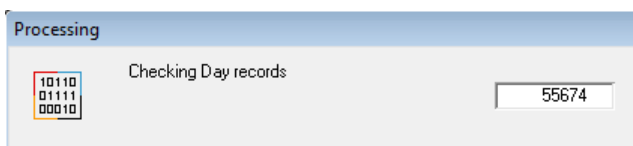


- Click **Save**

**Note: This is the DoE recommended protocol for naming Student export files.**



- Click **Yes**

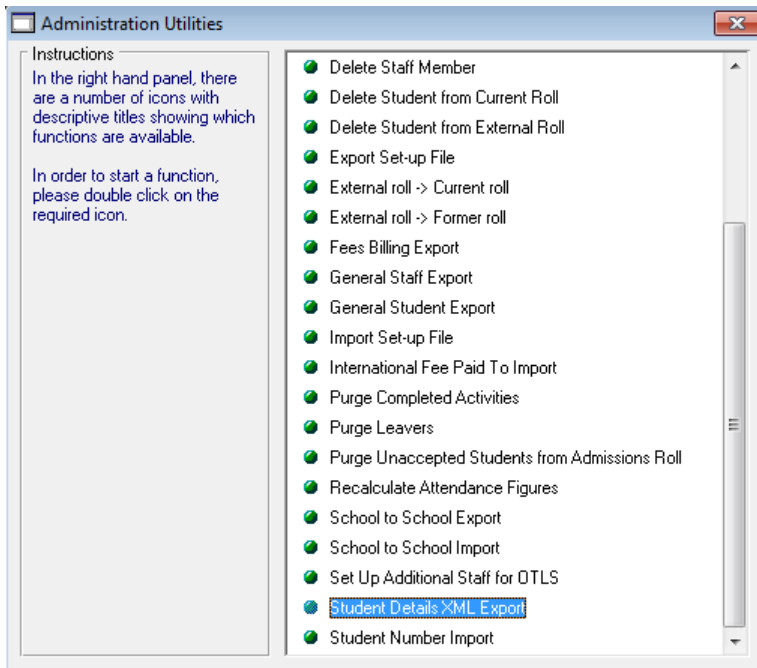


- Click **OK**

The export file may now be sent to the destination school as an email attachment. It would be helpful to provide the school with a list of the students whose data is being exported.

- Close the Transfer window by clicking **Cancel**

## Admin > Utilities > Student Details XML Export



- Click  Find Students

Enter the following information to locate Linda So

Student Search

General | Parameters | Dates | Address | Other | UDI | T Sets/Cohorts

Surname/Ref. No.  Roll Status

- Click **Find**

XML Export

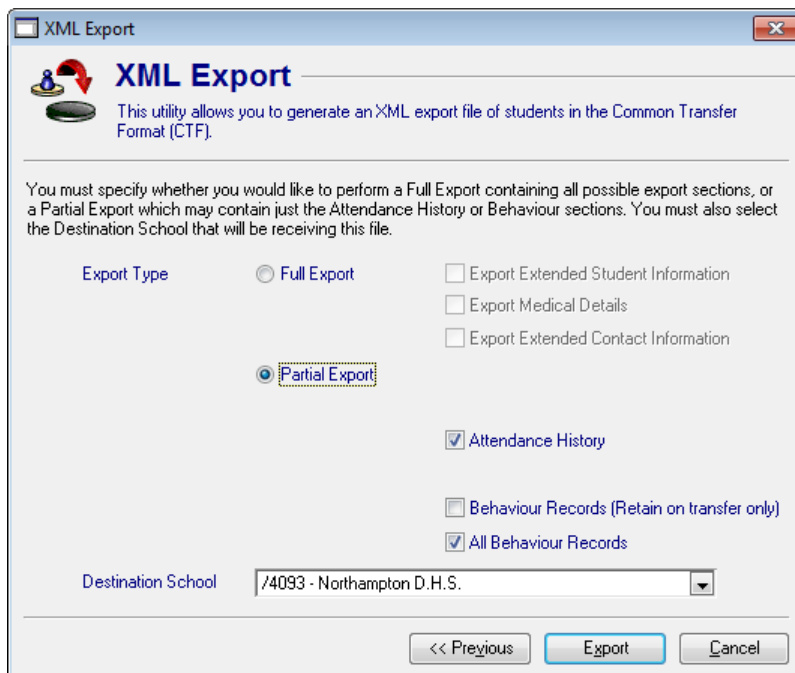
This utility allows you to generate an XML export file of students in the Common Transfer Format (CTF).

Select the students that you would like to export by using the Find Students button.

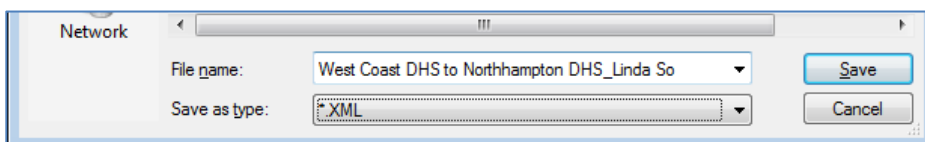
Ref.	Surname	Preferred Name	Year	Form	Date of Birth
357 (F)	So	Linda	9	09.2	6 JAN 2005

- Click **Next**
- Schools can elect to create a Full or Partial Export from the Student Details XML Export

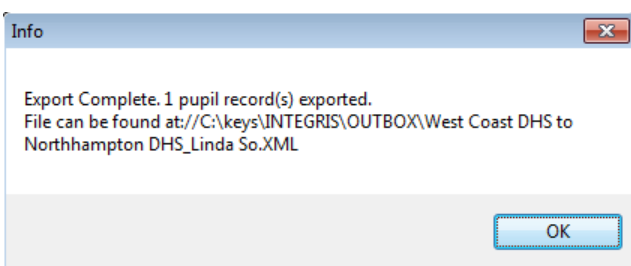
- Choose the Partial Export option



- Enter the Destination of **Northampton D.H.S**
- Click **Export**
- The export file should be Saved to the outbox
- Give the export file a name, for example **West Coast DHS to Northampton DHS\_Linda So**



- Click **Save**
- Click **Yes** to recalculate the Attendance figures



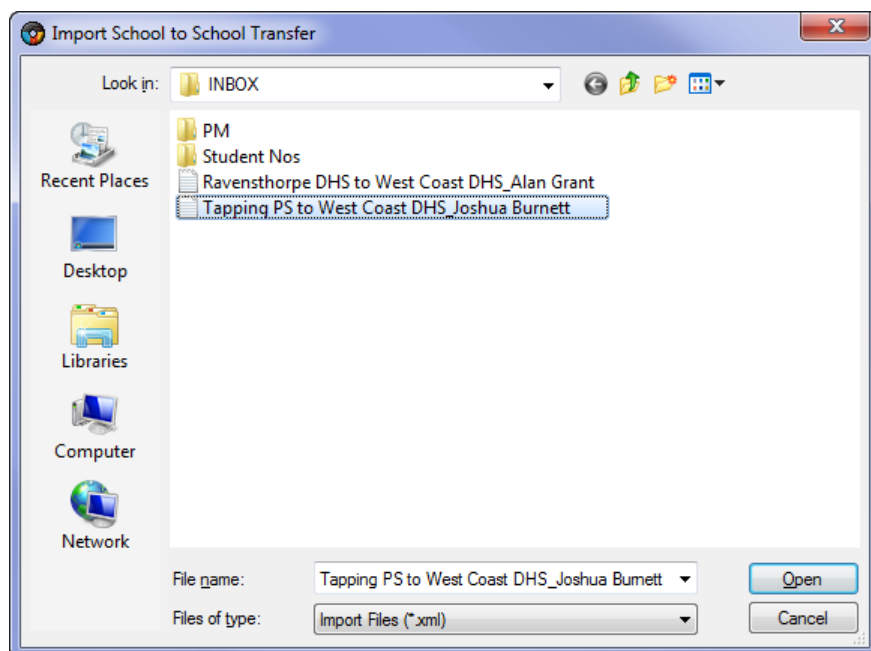
- Click **OK**
- Close the Transfer window by clicking **Cancel**

## 10.2 Importing Student Data

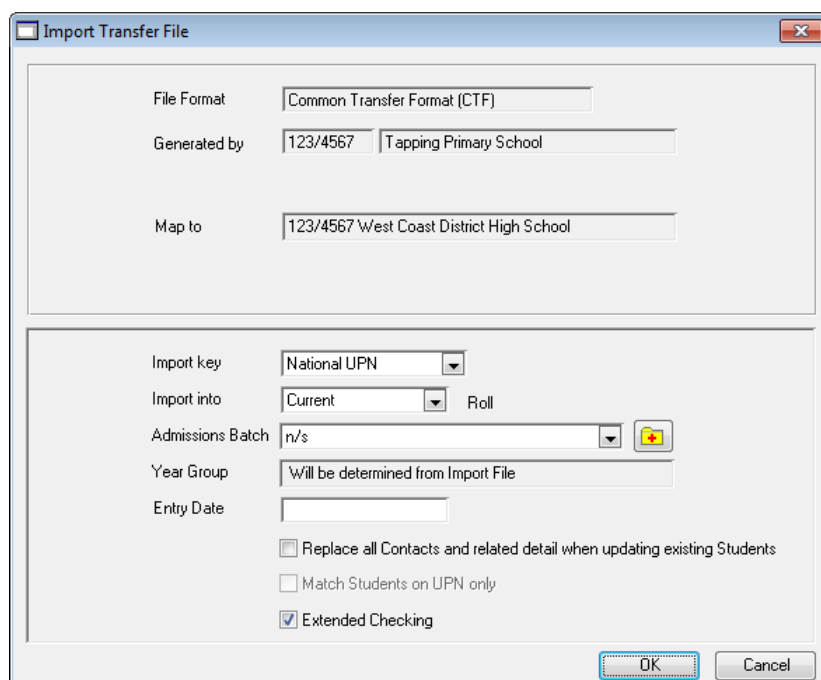
### 10.2.1 Importing Student Data to the Current Roll

#### Activity

##### Admin > Utilities > School to School Import



- Select the transfer file for **Tapping PS to West Coast DHS\_Joshua Burnett** and click **Open**
- Change **Import** into the **Current Roll** (as we have entered him onto that roll)



- Check **Extended Checking** (this ensures that possible duplicate records may be displayed)
- Click **OK**

The Extended Import Checking for Possible Duplicates window appears, showing any possible duplicate students that the important function has found.

- Highlight the Similar Student shown
- Select ***Import into the selected existing student record, retaining the existing core details***

**Extended Import Checking for Possible Duplicates**

The student(s) listed below already exist within Integris with the same date of birth and gender, and a similar name to one of the students you are importing. Please examine the details of the student in the import file and the students held within Integris below, and indicate how you would like to proceed.

**Student in Import File**

UPN	Z123456710004	Date of Birth	19 AUG 2004
Surname	Burnett	Gender	Male
First Name	Joshua		

**Similar Existing Student(s) within Integris**

UPN	Surname	First Name	DOB	Gender	Roll	Year	Form
M0234567x017	Burnett	Joshua	19 AUG 2004	Male	Current	7	07.1

**Action to be taken**

☐ Import as a new student  
☒ Import into the selected existing student record, retaining the existing core details  
☐ Import into the selected existing student record, replacing the core details with those from the import file  
☐ Do not import this student

Print OK

- Click **OK**

**Info**

Import Complete

OK

- Click **OK** and **Close**

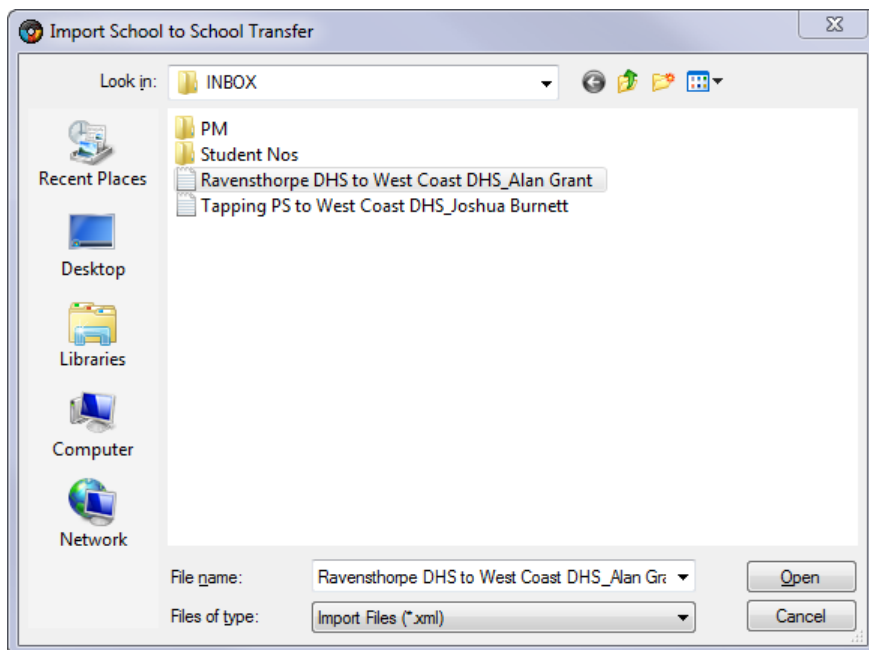
## General > Student Details

- Check that Joshua Burnett's information has been updated and that he now has a Lesson Attendance History.

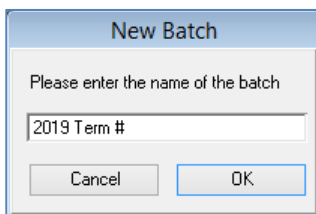
## 10.2.2 Importing to the Admissions Roll

### Activity

#### Admin > Utilities > School to School Import



- Highlight the transfer file for ***Ravensthorpe to West Coast\_Alan Grant.xml*** and click **Open**
- Select the **Admissions** Roll
- Click 
- Enter the following

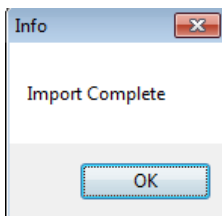


- Click **OK**




- Leave the **Entry Date** as TODAY
- **Extended Checking** option is ticked by default (Do not change)

- Click **OK**



- Click **OK** at the conclusion of the import process
- **Print** the import log to the screen

At school, this information could be saved as a hard copy of the import routine.

- **Close** the Import Log and Utilities
- View **Alan Grant's** records on the **Admissions** Roll.
- Check the Movement History 

## 11 User Defined Information

Within student records there is a section called **UDIs**. This is used for storing any information specific to your school that does not already have a field in **Student Details**. It could be anything from Student Photo Publication Permission to SmartRider Permission. Any Student fields that you set up as a UDI can also be used to report on and find students.

It is also possible to set up and maintain **Staff** and **School UDIs**.

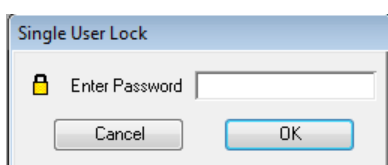
### 11.1 Creating a UDI

**Note: To create a UDI, it is necessary to be in Single User mode.**

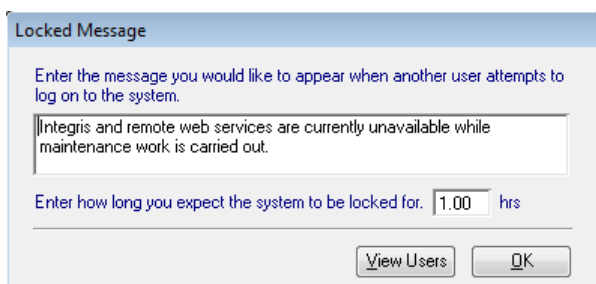
We wish to create a UDI field to record whether students have permission to use the internet at school.

#### Activity

##### File > Single User Lock



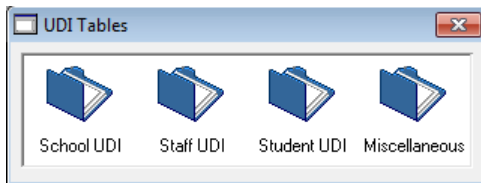
- Enter your password



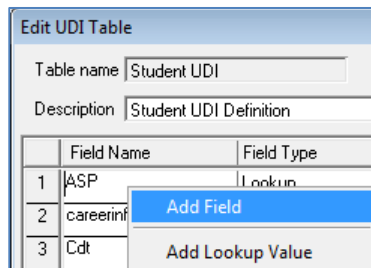
If other users are logged on to Integris, their details can be displayed via the **View Users** button so that the administrator can ask them to exit the system.

- Click **OK**

## General > Control > UDI Definitions



- Double click **Student UDI**
- Right click in the white pane under the **Field Name** heading




- Select **Add Field**
- Enter the **Field Name: Internetaccess**

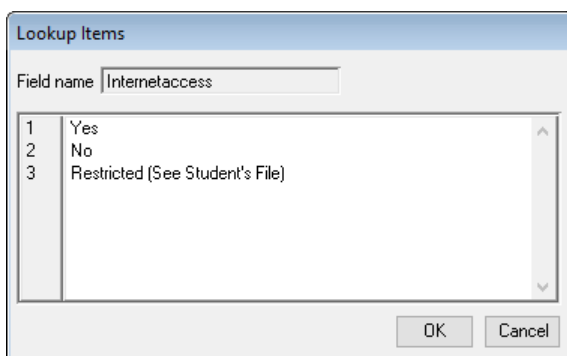
Internetaccess

**Note: Field Names cannot have spaces.**

- Press **<Tab>**
- From the drop-down menu, select **Lookup**



- Click Edit 
- Type **Yes**, **<Tab>**, **No**, **<Tab>**, **Restricted (See Student's File)**

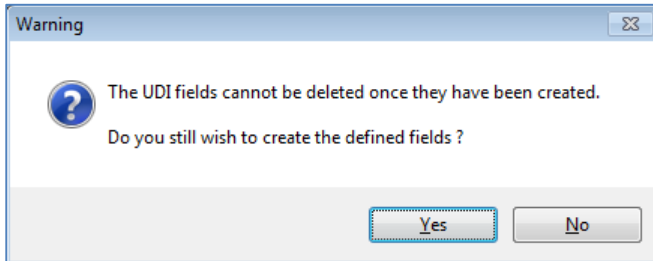


- Click **OK**

- Enter: **Internet Access** in the Description field
- Check the **Index** box

Internet Access	<input checked="" type="checkbox"/>
-----------------	-------------------------------------

- Click **OK**



- Click **Yes**

**Note:** While a UDI cannot be deleted, it can be edited or disabled.

To return to Multi-user mode:

- Click 
- Select **Restore Multi-user**



- Type your password
- Press **<Enter>** or click **OK**

# 12 Speed Edit

## Admin > Speed Edit

**Speed Edit** enables users to edit a number of student records at the same time in order to make the process faster. Speed Edit can be used to allocate House Factions, Current Forms, Acceptance Status, PG1 Fees Billers, Health cards and much more.

### Activity

#### Speed edit the UDI *Internet Access* for all students in Year 6




- Select **\*\*Student UDI Fields\*\*** from the **Area** menu

- Select **Internet Access** from the **UDI Field** menu

- Find  and select the **Year Group 6**

- Click **Find, Select** and **Yes**
- Click on the New Value drop down arrow to view the Lookups

- Highlight some of the students and select **Yes**

- Click Apply Changes 
- Highlight some of the students and select **No**
- Click Apply Changes 
- Highlight some of the students and select **Restricted (See student's file)**
- Click Apply Changes 
- Click **Save** and **Yes**

Some students have not provided their Vaccination Schedule to the school. Speed Edit may be used to flag those students who have not yet provided evidence of their Vaccination status.

- Select the **\*\*Student UDI Fields\*\*** from the **Area** menu
- Select the **Vaccination Schedule** from the **UDI Field**

Speed Edit

Area: \*\* Student UDI Fields \*\* UDI Field: Vaccination Schedule

- Click
- Select all the student on the **Current Roll**
- Click **Find, Select** and **Yes**
- Click on the **Blanks** tab

Speed Edit

Area: \*\* Student UDI Fields \*\* UDI Field: Vaccination Schedule

Select All Deselect All Invert Selection **Blanks** n/s

Ref.	Student Name	Value	Status
766	Albert, Jackie		
2	Alkitik, Adam		
879	Alkitik, Maria	Not provided	
866	Allen, Penelope	Fully Completed	
800	Allen, Tamara	Fully Completed	
846	Amber, Kyle	Fully Completed	
890	Amber, Kylie	Fully Completed	
3	Anderson, Ben	Not provided	
845	Anderson, Kurt		
880	Andrews, Guy	Not provided	
778	Andrews, Luke	Up to date	
4	Andrews, Rachael	Not provided	
5	Angus, Sally	Not provided	
6	Antonello, Mark	Not provided	
875	Arrowsmith, David	Fully Completed	
881	Arrowsmith, William	Not provided	
7	Aspinall, Simone	Not provided	
1	Atkins, Aaron	Not provided	
820	Avery, Charmaine	Not provided	
801	Avery, Rachel	Not provided	

New Value:  ☒

- Select **Not Provided** from the **New Value** menu

New Value

- Fully Completed
- No - medical
- No - objection
- Not provided

- Click **Apply Changes**



Speed Edit

Area: \*\* Student UDI Fields \*\* UDI Field: Vaccination Schedule

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
765	Ward, Guy	No - objection	
798	Ward, Simon	Not up to date	
386	Watson, Tom	Not provided	
387	Welsh, Louis	Not provided	
803	West, Thy	Up to date	
388	Wheeler, Margaret	Not provided	
390	Williams, Katie	Not provided	
391	Williams, Sandra	Not provided	
389	Williams, Tenille	Not provided	
761	Williett, Elizabeth	Not provided	
811	Winter, Annette	Not provided	
392	Yeoma, Bobby	Not provided	
393	Young, Eileen	Not provided	
394	Yuppy, Travis	Not provided	
395	Zanadu, Paul	Not provided	
396	Zilter, Susan	Not provided	
397	Zione, Koby	Not provided	
398	Zip, Michelle	Not provided	
399	Zolter-Albert, Jennifer	Not provided	M

New Value: Not provided

Close Save

- Click **Save** and **Yes**

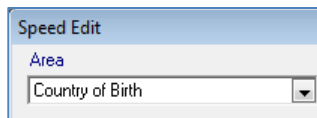
Warning

Are you sure you wish to save the modifications?

Yes No

**Country of Birth has not been recorded for most of the students in Year 2. Speed Edit their records to show their Country of Birth.**


- Select **Country Of Birth** from the **Area** drop down list

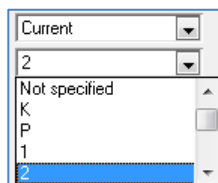


Speed Edit

Area

Country of Birth

- Find  all the students in **Year Group 2**



Current

2

Not specified

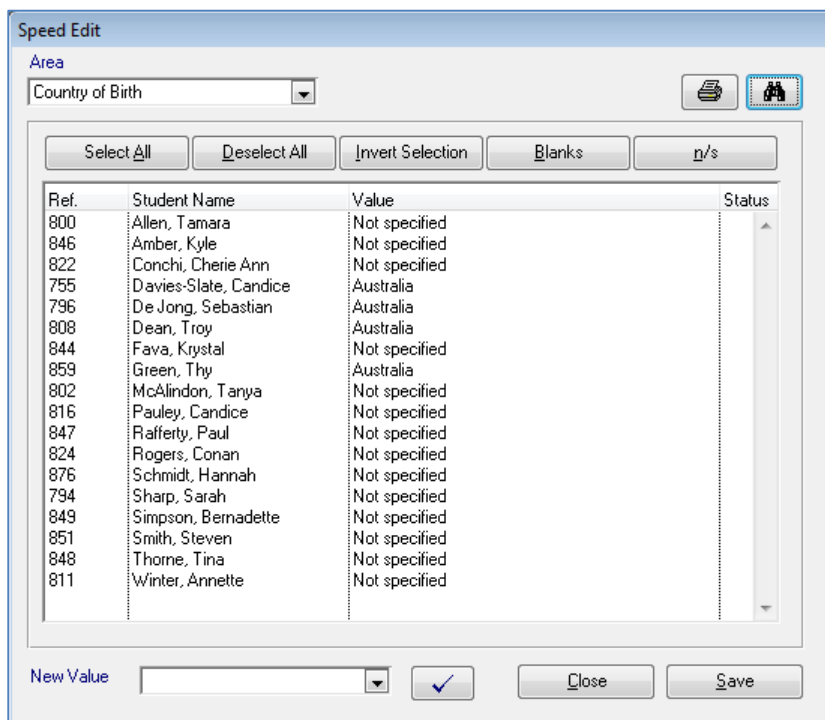
K

P

1

2

- Click **Find, Select** and **Yes**



Speed Edit

Area

Country of Birth

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
800	Allen, Tamara	Not specified	
846	Amber, Kyle	Not specified	
822	Conchi, Cherie Ann	Not specified	
755	Davies-Slate, Candice	Australia	
796	De Jong, Sebastian	Australia	
808	Dean, Troy	Australia	
844	Fava, Krystal	Not specified	
859	Green, Thy	Australia	
802	McAlindon, Tanya	Not specified	
816	Pauley, Candice	Not specified	
847	Rafferty, Paul	Not specified	
824	Rogers, Conan	Not specified	
876	Schmidt, Hannah	Not specified	
794	Sharp, Sarah	Not specified	
849	Simpson, Bernadette	Not specified	
851	Smith, Steven	Not specified	
848	Thorne, Tina	Not specified	
811	Winter, Annette	Not specified	

New Value

Close Save



- Highlight **Kyle Amber**

Select All	Deselect All	Invert Selection	Blanks	n/s
Ref.	Student Name	Value	Status	
800	Allen, Tamara	Not specified		
846	Amber, Kyle	Albania	M	
822	Conchi, Cherie Ann	Not specified		
755	Davies-Slate, Candice	Australia		

- Select **Albania** from the **New Value** menu

New Value

Ad  le Land (France)

Afghanistan

Aland Islands

Albania

Algeria

- Click Apply Changes ☒
- Click

Select All	Deselect All	Invert Selection	Blanks	n/s
Ref.	Student Name	Value	Status	
800	Allen, Tamara	Not specified		
846	Amber, Kyle	Albania	M	
822	Conchi, Cherie Ann	Not specified		
755	Davies-Slate, Candice	Australia		
796	De Jong, Sebastian	Australia		
808	Dean, Troy	Australia		
844	Fava, Krystal	Not specified		
859	Green, Thy	Australia		
802	McAlindon, Tanya	Not specified		
816	Pauley, Candice	Not specified		
847	Rafferty, Paul	Not specified		
824	Rogers, Conan	Not specified		
876	Schmidt, Hannah	Not specified		
794	Sharp, Sarah	Not specified		
849	Simpson, Bernadette	Not specified		
851	Smith, Steven	Not specified		
848	Thorne, Tina	Not specified		
811	Winter, Annette	Not specified		

- Select **Australia** from the **New Value** menu

New Value

Albania

Argentinian Antarctic Territory

Armenia

Aruba

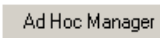
Australia

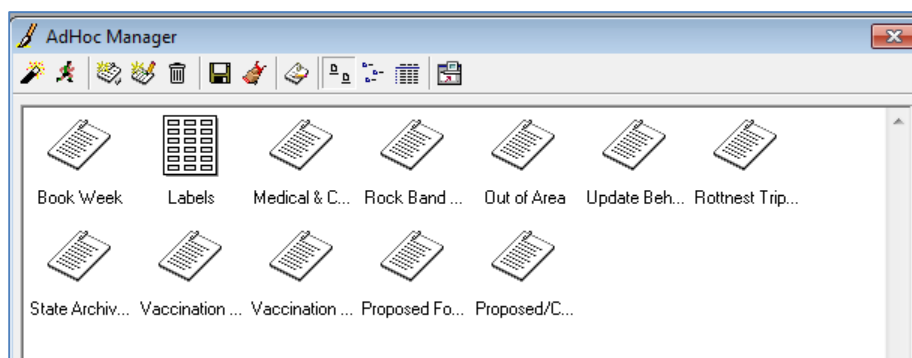
- Click **Apply Changes** ☒
- Click **Save and Yes**


## 12.1 Ad Hoc Reports

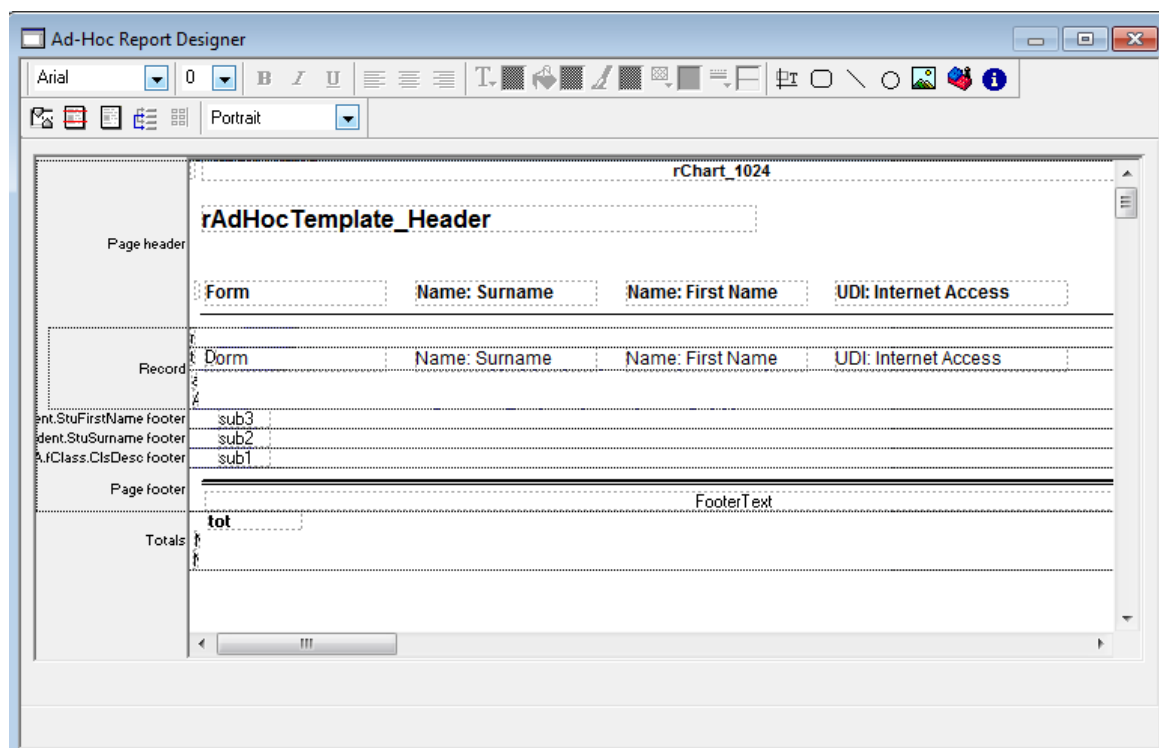
### Admin > Reports > Ad Hoc Reports

Users can create their own reports using **Ad Hoc Manager**.

Highlight the **Ad Hoc Reports** folder and click on the  button that appears on the right-hand side of the window. The **Ad Hoc Manager** window opens.



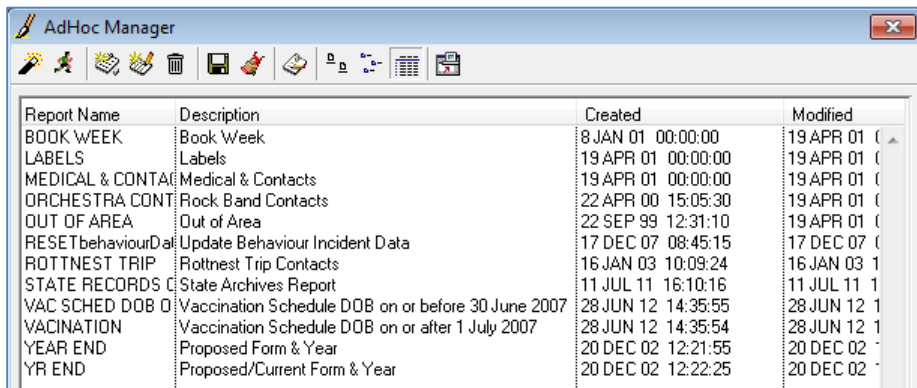
To create a new report, click on the Ad Hoc Wizard.  This will take you through the Ad-Hoc Wizard function, asking you to select what data you wish to include in your report and how you wish to sort it. Once you have progressed through all the Wizard windows you will be asked to create your report. This takes all the fields you have specified and displays them in the design window, enabling you to make changes to the layout of the report:



It is here that field lengths can be extended, text styles can be changed and fields can be rearranged and added to change the whole layout of the report.

Closing the design window saves the set-up and brings you back to the **Ad Hoc Manager** window where all the reports created will be displayed.

Use the  buttons to change the view of the Ad Hoc Reports.



Report Name	Description	Created	Modified
BOOK WEEK	Book Week	8 JAN 01 00:00:00	19 APR 01 00:00:00
LABELS	Labels	19 APR 01 00:00:00	19 APR 01 00:00:00
MEDICAL & CONTACTS	Medical & Contacts	19 APR 01 00:00:00	19 APR 01 00:00:00
ORCHESTRA CONTACTS	Rock Band Contacts	22 APR 00 15:05:30	19 APR 01 00:00:00
OUT OF AREA	Out of Area	22 SEP 99 12:31:10	19 APR 01 00:00:00
RESETbehaviourData	Update Behaviour Incident Data	17 DEC 07 08:45:15	17 DEC 07 08:45:15
ROTTNEST TRIP	Rottnest Trip Contacts	16 JAN 03 10:09:24	16 JAN 03 10:09:24
STATE RECORDS	State Archives Report	11 JUL 11 16:10:16	11 JUL 11 16:10:16
VAC SCHED DOB ON OR BEFORE 30 JUNE 2007	Vaccination Schedule DOB on or before 30 June 2007	28 JUN 12 14:35:55	28 JUN 12 14:35:55
VACINATION	Vaccination Schedule DOB on or after 1 July 2007	28 JUN 12 14:35:54	28 JUN 12 14:35:54
YEAR END	Proposed Form & Year	20 DEC 02 12:21:55	20 DEC 02 12:21:55
YR END	Proposed/Current Form & Year	20 DEC 02 12:22:25	20 DEC 02 12:22:25



Modify Report



Copy Selected Report

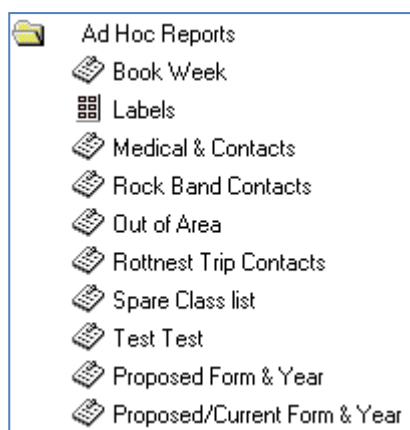


Rename Selected Report

**Note: It is a good idea to copy a report and give it a new name before making any changes.**

Once reports have been defined, they are run in the same way as standard reports.

- Open the Ad Hoc Reports folder
- Highlight the report to be printed

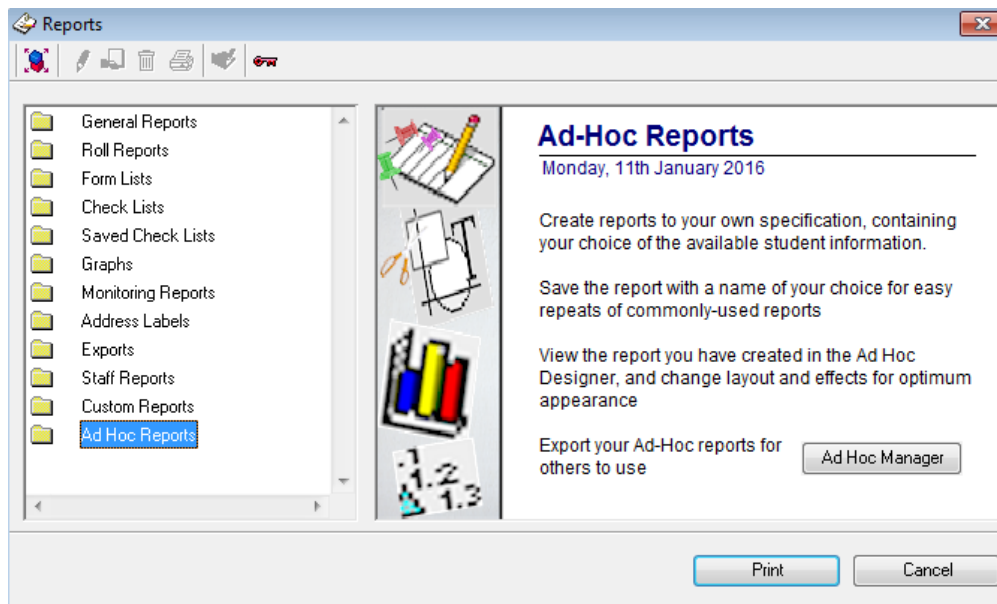



- Use **New Query** to load the **Student Search** window
- Select students or load a saved query
- **Print** the report

## Activity

Create an Ad Hoc report displaying student's names, Forms and the *UDI Internet Access*. Sort by Form and display each form on a separate page.

- Click on the text for **Ad Hoc Reports**



- Click **Ad Hoc Manager**
- Click **Ad Hoc Wizard** 
- Enter the following information

A screenshot of a software window titled "AdHoc Report Wizard". On the left is a graphic of a large blue question mark. The main area is titled "Welcome to the AdHoc Report Wizard" and contains the following fields and options:

- Report Name:** A text box containing "INTERNET ACCESS".
- Description:** A text box containing "Internet Access Permission".
- Report Area:** Three radio buttons: "Students" (selected), "Staff", and "School".
- Report Format:** Five radio buttons: "Simple Report" (selected), "Normal Report", "Export", and "Labels".

At the bottom are three buttons: "< Back", "Next >" (highlighted), and "Close".

- Click **Next**

- Check the following fields:
  - **Form**
  - **Name: First Name**
  - **Name: Surname**
  - **UDI: Internet Access**
- Click **Next**
- Leave the **Selection Criteria** as **ALL**
- Click **Next**
- Select the following **Print/Sort Options**:

Print / Sort Options						
	Field		Sort	▲▼	Total	Page
	Form	<input checked="" type="checkbox"/>	1	▲	<input type="checkbox"/>	<input type="checkbox"/>
	Name: First Name	<input checked="" type="checkbox"/>	3	▲	<input type="checkbox"/>	<input type="checkbox"/>
	Name: Surname	<input checked="" type="checkbox"/>	2	▲	<input type="checkbox"/>	<input type="checkbox"/>
	UDI: Internet Access	<input checked="" type="checkbox"/>	0	▲	<input type="checkbox"/>	<input type="checkbox"/>

**Note: Normally a Page break would be used for Form or Year for this type of report.**

- Click **Next**
- Highlight **Name: Surname** and click **Up** to select the following print order

Print Order  
 Form  
 Name: Surname  
 Name: First Name  
 UDI: Internet Access

Either - use the buttons below to move the selected field to the required position  
  
 Or - drag and drop the fields into their correct positions in the list box to the left.

- Click **Next**
- Click **Create**

The Ad-Hoc Designer window opens

rAdHocTemplate\_Header

Form

Name: Surname

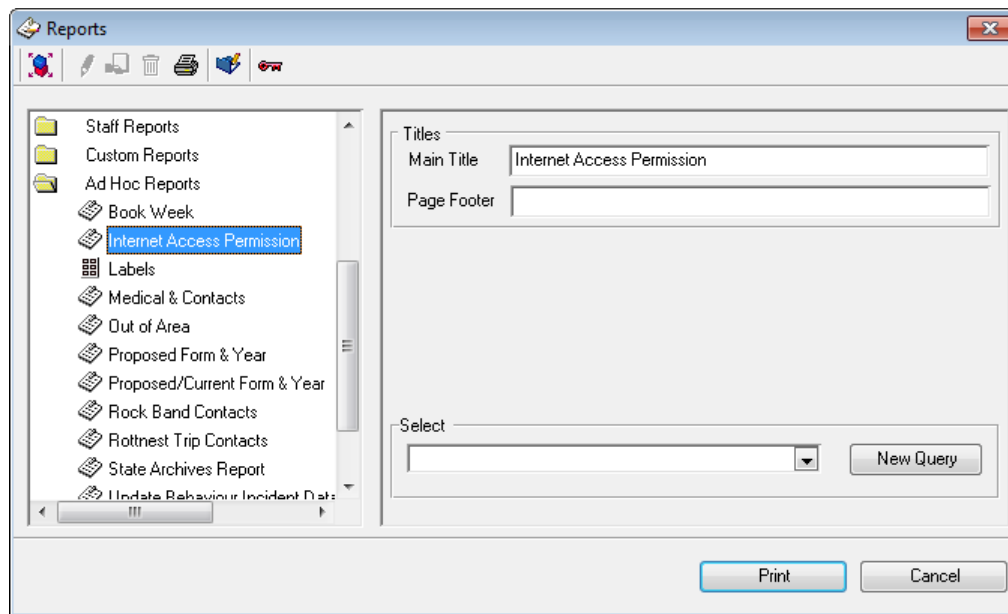
Name: First Name

UDI: Internet Access

- Click the **Form** column header once (in bold)
- Change the font size to **12**
- With **Form** still selected, click Text Colour
- Double click and remove **Name:** from **Name: Surname** and **Name: First Name**
- Continue to format the remaining column headers if required

Form	Surname	First Name	Internet Access Permissioi
Dorm	Name: Surname	Name: First Name	UDI: Internet Access
sub3			

- Close **Ad Hoc Report Designer** and **Ad Hoc Manager**
- Open the **Ad Hoc Reports** folder
- Select the report **Internet Access Permission**



- Click **New Query**
- Find the **Year Group 6** students
- Click **Find Select** and **Yes**
- Print the report to the screen
- Close

**Note: To make any further changes, close the report and return to Ad Hoc Reports > Ad Hoc Manager. Double click on the report name to open it if you wish to modify the report.**

## 13 Groups

Groups of either staff or students can be set up so that it is easy to identify who are attending excursions, what clubs people are affiliated with, or for grouping students for assessment.

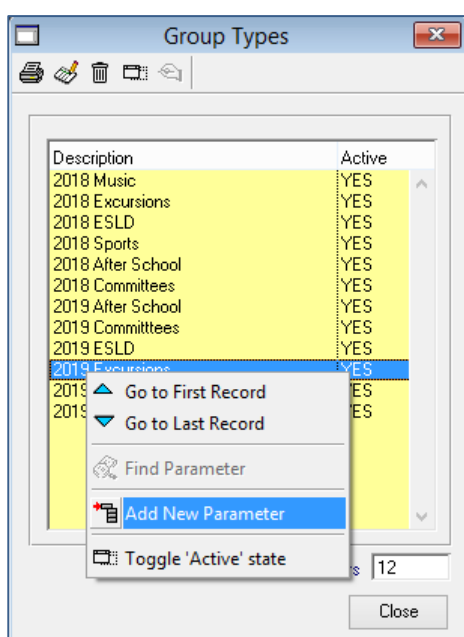
Groups are categorised under **Group Types** which are set up within **Parameters > Group Types**.

### 13.1 Group Types

#### Activity

##### General > Parameters > Group Types

- Right click in the **Group Types** list
- Select **Add New Parameter**



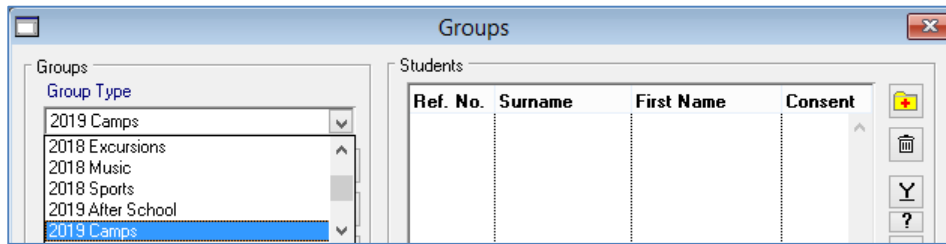
- Enter **2019 Camps** and click **OK**


Description	Active
2018 Music	YES
2018 Excursions	YES
2018 ESLD	YES
2018 Sports	YES
2018 After School	YES
2018 Committees	YES
2019 After School	YES
2019 Committees	YES
2019 ESLD	YES
2019 Excursions	YES
2019 Music	YES
2019 Sports	YES
2019 Camps	YES

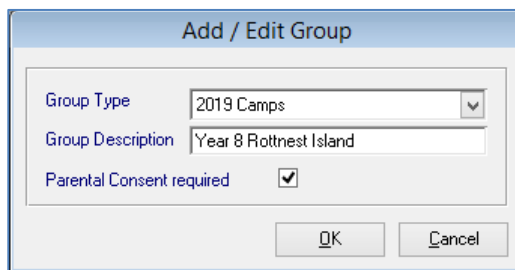
- Close Group Types and Parameters



## General > Groups

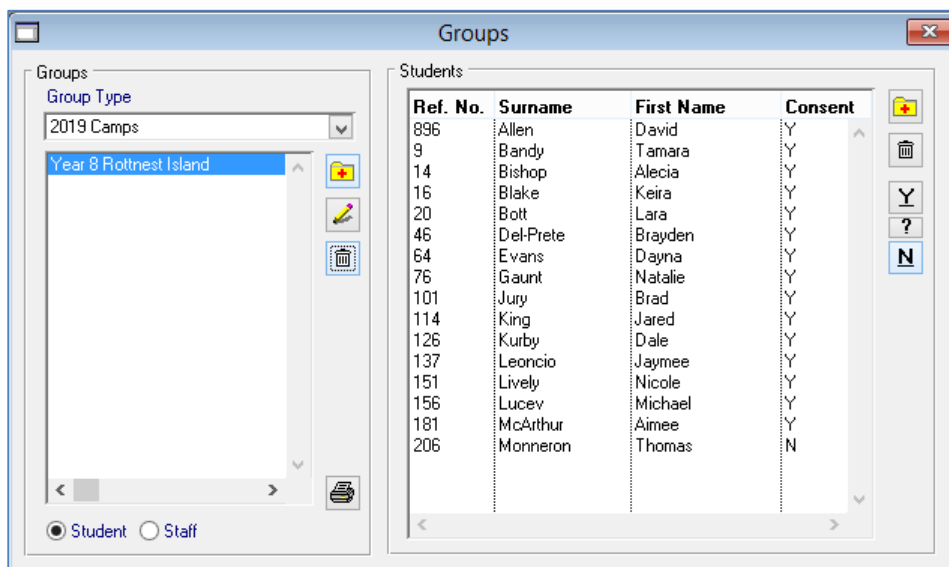
- From the **Group Types** menu, select **2019 Camps**





- Click Add Group 
- Enter a **Group Description** and check **Parental Consent required**



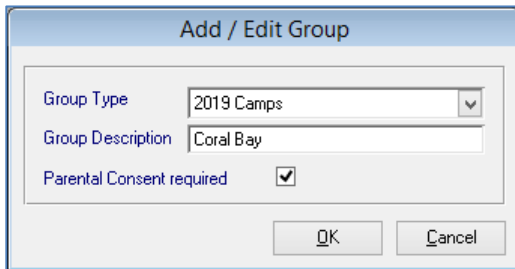
- Click **OK**
- Highlight the **Year 8 Rottnest Island** and click **Add Members**  on the right
- Find the **Form Year 8.1** students and select some of the students
- Highlight most of the students in the list and click Parental Consent given 




- Delete  from the list those students without parental consent
- Print  the list of students on the Rottnest Island camp to screen



- Add  a second Group **Year 10 Coral Bay** and again check **Parental Consent required**
- Click **OK**



The screenshot shows a dialog box titled "Add / Edit Group". It contains three fields: "Group Type" with a dropdown menu showing "2019 Camps", "Group Description" with a text box containing "Coral Bay", and "Parental Consent required" with a checked checkbox. At the bottom are "OK" and "Cancel" buttons.

- Add some **Year 10** students to the **Coral Bay** group
- Indicate that these students have parental consent
- Print  the list of students on the Coral Bay camp to screen

## 14 Review Maintaining Students Records

### 14.1 Start of Day Two

#### Activity

Complete each of the following tasks and make a note of the pathway taken.

1. **Lynda Miller'** is on the Admissions Roll and has been accepted as a student at West Coast District High School. Edit her record to mark her as accepted, allocate her to a form (Room 1) and move her to the **Current** Roll.
2. Move **Kevin Istan** to the **Former** Roll. He is leaving TODAY and going to **Bunbury Senior High School**.
3. Export **Kevin Istan's** records so his data can be sent to **Bunbury Senior High School**
4. Print emergency contact information for **Doyen Bailie**.
5. Three students in **Form 8-2** have not been allocated to a House. Use **Speed Edit** to put them into Houses.

## 15 Mail Merge

Integris provides users with a letter writing facility as part of the **Student**, **School** and **Staff Details** sections of the software.

There are two ways that Integris can create mail-merged documents.

### Option 1

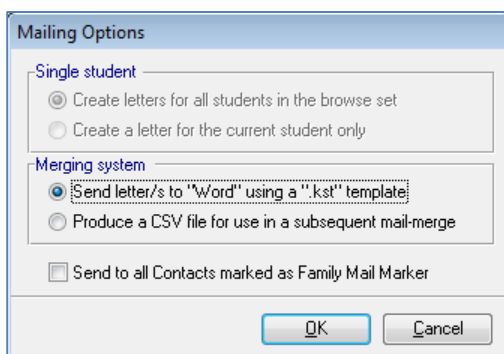
The first is by way of using mail merge fields available through the database. The Integris database is supplied with a mail merge function whereby certain administrative details such as student's names and addresses can be dynamically embedded into a MS Word template. These can then be saved as school letters. The letter templates are created before using the **Send Letter** function in **Student Details**.

### Option 2

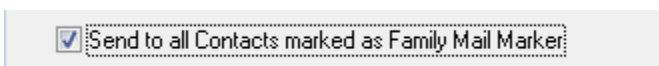
The second way is to create an export file, which then allows users to use the MS Word mail merge functions to create their letters or other documents such as address labels, by linking to this exported data.

### Selecting Students and Merging System

When you are ready to send a letter, decide to whom the letter will be sent. If the letter is to be sent for one student, load their records in Student Details. If the letter is to be sent for a group of students, use the **Find Student** function in **Student Details** to create a browse set of students. When the user has selected the student/s in Student Details and the **Send Letter** button is clicked, a **Mailing Options** window is displayed.



Make selections as appropriate. If using the **.kst** method, the template has to be created prior to clicking **Send Letter**.



### Letters to be sent to all contacts flagged as Family Mail Markers:

If **\*.kst** file merging is being used, this may result in multiple copies of the letter being produced for each student, e.g. if more than one contact is flagged as Family Mail Marker. If a **\*.csv** file is being exported, several record lines may be included in the file for each student (one for each Mail Marker contact). In this regard, tick the Family Mail Marker box to only have letters sent to the Parent/Guardian flagged as such.

**Note: Other Contacts can be flagged as Family Mail Markers as well as Parent/Guardians.**

The Family Mail Marker field should be enabled if letters are to be sent to the person at this address. If you use this field, make sure you complete the Salutation. Enter the salutation that is to be used when writing a letter to this person. It is also displayed on some reports.

If a student has details of both parents recorded, with only one parent/guardian nominated as a family mail marker. The salutation field will need to be completed for the nominated parent e.g. 'Mr and Mrs Allen'. This will be available as a mail merge field to start a letter "Dear Mr and Mrs Allen".


**Note: If letters are to contain Family Mail Marker information then the letter template must contain 'Addee' fields and the box ticked for 'Send to all contacts marked as Family Mail Marker' (see screenshots below).**

<b>AddresseeName</b>	<AddeeName>	
<b>AddresseeInitials</b>	<AddeeInitials>	
<b>AddresseeFirstName</b>	<AddeeFirstName>	
<b>Addressee Mobile</b>	<AddeeMobile>	
<b>Addressee Email Address</b>	<AddeeEmail>	
<b>AddresseeSurname</b>	<AddeeSurname>	
<b>AddresseeSalutation</b>	<AddeeSalutation>	These fields are updated when "Send to Family Mail Marker" is selected.
<b>Addressee Telephone 1</b>	<AddeePhoneT1>	
<b>Addressee Telephone 2</b>	<AddeePhoneT2>	
<b>AddresseeTitle</b>	<AddeeTitle>	
<b>AddresseeAddress (Block)</b>	<AddeeAddress>	
<b>AddresseeAddress (Split)</b>	<AddeeAddShortBlock> <AddeeAddTown> <AddeeAddCountyState> <AddeeAddPostCode> <AddeeAddCountry>	

## 15.1 Mail Merge: kst format

Using the kst method, the user creates a letter template prior to selecting contacts to which the letter will be sent. This method is useful for printing small numbers of letters. If letters are to be merged for a large number of students, use the Export method (Option 2).

### Creating a kst Template

- Open Microsoft Word
- Click Open Document 
- Navigate your way to the **K:\Keys\Integris\MMTPL\Letters** folder
- Open the **Student.kst** document that is supplied with the software.

### RM Management Solutions Integris Student Mailing Fields



30 June 2015 (note – this is a Word Date field. It can be used in your letter templates)

Field Name	Displays	Notes
Known Name(UK)	<KnownName>	Student Details
Preferred Name(Australia)	<PreferredName>	
First Name	<FirstName>	
Second Name <span>New!</span>	<SecondName>	
Surname	<Surname>	
Legal Surname	<LegalSurname>	
DOB	<DOB>	
Age	<Age>	
Year/Class (UK)	<Year/Class>	
Year/Form (Australia)	<Year/Form>	
Class (UK)	<Class>	
Form (Australia)	<Form>	
Class Tutor 1(UK)	<Tutor1>	
Class Tutor 2(UK)	<Tutor2>	
Form Teacher 1(Australia)	<Teacher1>	
Form Teacher 2(Australia)	<Teacher2>	
Year	<Year>	

This can be used to copy merge fields into the letter template you are creating.

- Open a new Microsoft Word document

This will be used for the letter template.

- Type the body of the letter.
- Enter the merge fields for your letter template using the field names in the **Student.kst** document for any Integris fields you want included in the letter.
- Save your document with .kst extension in quotation marks, for example **“Student Letter.kst”**

This letter template should be saved to an appropriate folder within your school network, for example to a shared drive where all templates are stored.

When the template is complete, it will be available to all users with access to the drive where the template is stored.

**Note: When creating .kst Templates, users are advised NOT TO USE Numbered Bullet lists as these will cause the Template to be corrupted. Numbers must be typed in, rather than inserted using Numbering or Bullet Lists. This issue is with MS Word .kst Templates.**

### 15.1.1 Creating a .kst Template

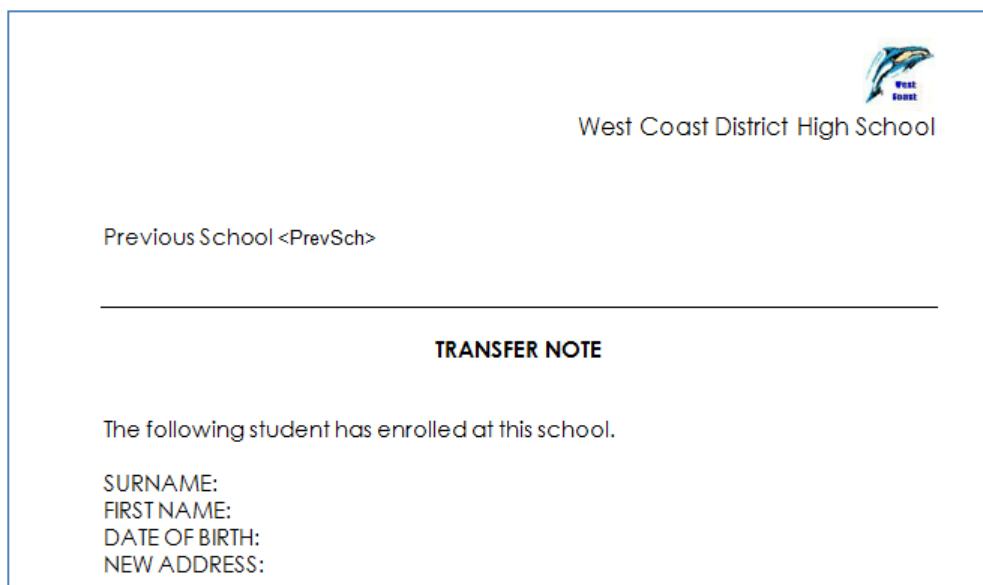
#### Activity

A copy of the sample transfer note can be found in the Administration Manager – Supplement.

- Navigate to **My Computer - C:\Keys\Integris\MMTPL\Letters** to open **Student.kst**
- Minimise the **Student.kst**
- Open the document **Sample Transfer Note** also located in **C:\Keys\Integris\MMTPL\Letters**

Text has been entered but the merge fields need to be added.

- Type Previous School above the black line
- Copy **<PrevSch>** from **Student.kst** and paste it at the top of your Transfer Note



The image shows a sample transfer note template. At the top right is the West Coast District High School logo, which features a blue and yellow dolphin jumping over a wave. Below the logo, the text "West Coast District High School" is centered. Further down, the text "Previous School <PrevSch>" is followed by a horizontal black line. Below the line, the words "TRANSFER NOTE" are centered. Underneath, the text "The following student has enrolled at this school." is followed by four lines of labels: "SURNAME:", "FIRST NAME:", "DATE OF BIRTH:", and "NEW ADDRESS:".

**Note: The Previous School field comes from the Movement History record for a student. If a Movement History has not been added against the student, the field will not populate.**



West Coast District High School

Previous School <PrevSch>

---

#### TRANSFER NOTE

The following student has enrolled at this school.

SURNAME: <Surname>  
FIRST NAME:  
DATE OF BIRTH:  
NEW ADDRESS:

**Note: When typing in merge fields, they must appear exactly as they appear in Student.kst.**

- Continue to copy and paste, or type merge fields into your transfer note (Hint: Use the example in the Administration Manager Supplement on page 23).
- When all merge fields have been added **File > Save As**
- Enter the file name as **"Transfer Note.kst"**

File name:	Transfer Note.kst	▼
Save as type:	Word 97-2003 Document (*.doc)	▼


- Click **Save**

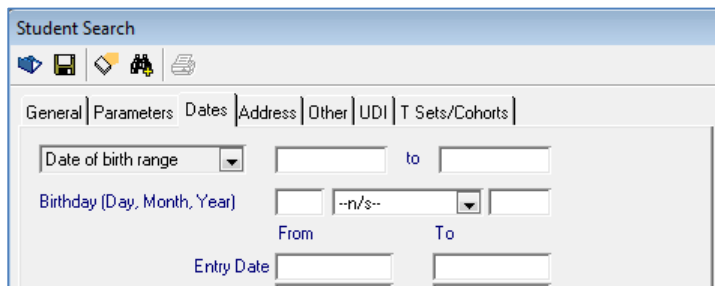
## 15.1.2 Using the kst template to create letters

### Activity

#### General > Student Details

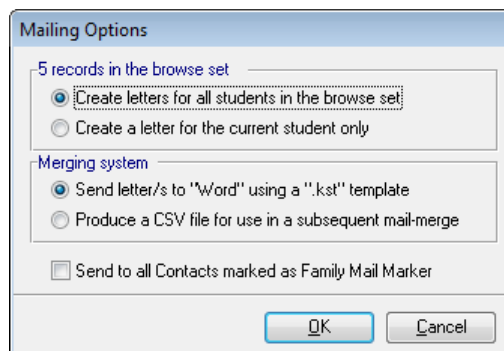
Send Transfer Notes for the students who started at West Coast District High School yesterday.

- Find  the students who started yesterday
- Click on the **Dates** tab
- Enter Yesterday's and Today's date in the **Entry Date From** and **To** fields
- Click **Find**, **Select** and **Yes**



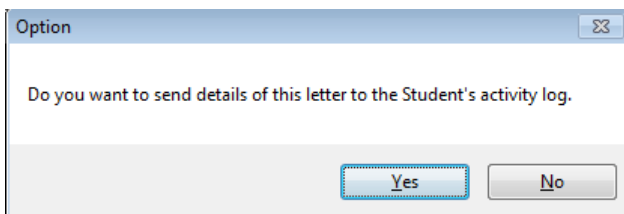
The Student Search dialog box shows the 'Dates' tab selected. It contains fields for 'Date of birth range' (with a dropdown and 'to' separator), 'Birthday (Day, Month, Year)' (with a dropdown and '--n/s--' separator), and 'Entry Date' (with 'From' and 'To' sub-labels and input fields). There are also icons for navigation and search at the top.

- Click **Send Letter** 
- Select the following options



The Mailing Options dialog box shows the following options:  
- 5 records in the browse set  
- ☒ Create letters for all students in the browse set  
- ☐ Create a letter for the current student only  
- Merging system:  
- ☒ Send letter/s to "Word" using a ".kst" template  
- ☐ Produce a CSV file for use in a subsequent mail-merge  
- ☐ Send to all Contacts marked as Family Mail Marker  
Buttons: OK, Cancel

- Click **OK**
- Select **Transfer Note.kst**
- Click **Open**




The Option dialog box asks: "Do you want to send details of this letter to the Student's activity log." with buttons for Yes and No.

- View the Transfer Notes before you click Yes to this message
- Close the Transfer Notes
- Click **Yes** if the Transfer Notes printed as expected.



***Note: If there are problems with the merged document, you can close and re-open the original to make any corrections before running the mail merge again.***

**DO NOT CLOSE WORD**

- Click Student Activity 
- View the new student's records
- Close Student Details


## 15.2 Mail Merge using CSV format

### General > Student Details

The second mail merge option is to create an export file, which then enables users to use the MS Word mail merge functions to create their letters or documents. This method is faster than the .kst method when creating merged documents for a large number of students.

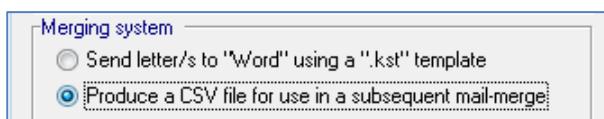
Find the student/s to which you wish to send a Letter

This creates a browse set.

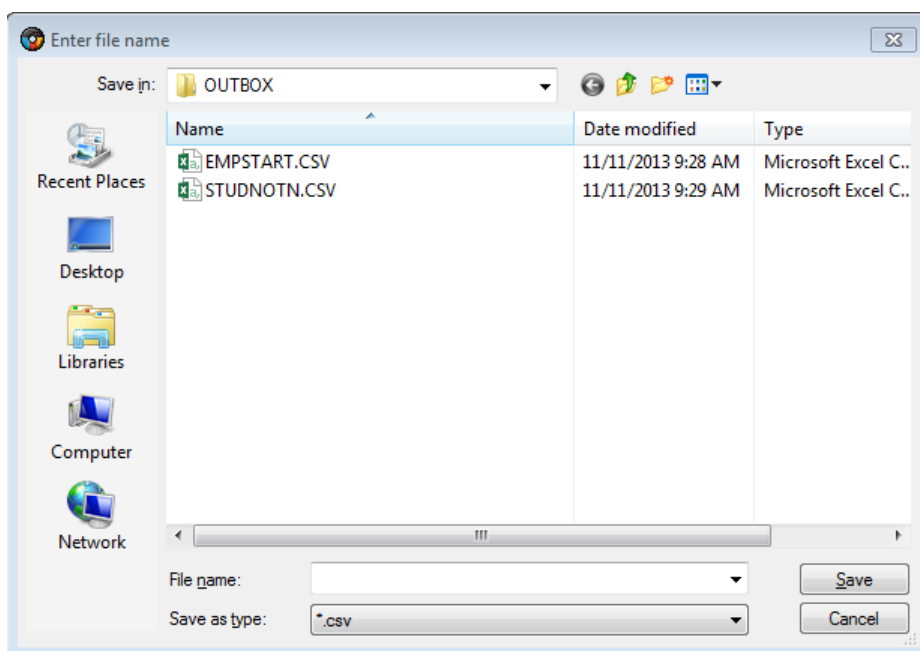
- Click Send Letter  in the Student Details window

The Mailing Options window opens.

Select the **CSV** option



- Click **OK**



- Name the file and save it to an appropriate location
- Click **OK**

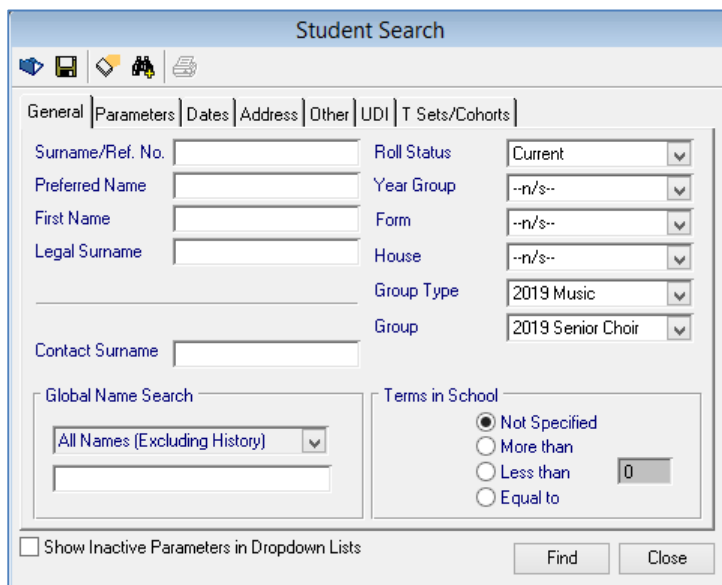
You have now created a file that can be used in Microsoft Word, or other word processing packages, to create forms, letters, labels or other merged items.

## 15.2.1 Creating an Export (.csv) File

### Activity

#### General > Student Details


- Find  the **Senior Choir**

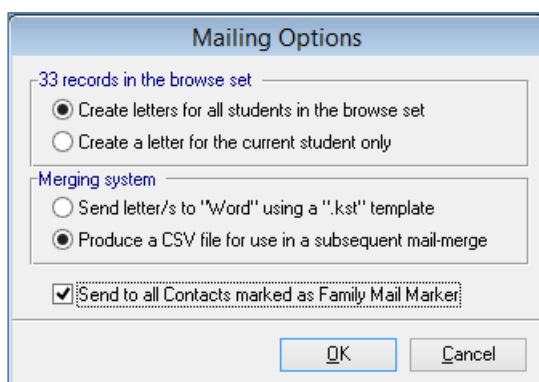


The 'Student Search' dialog box is shown with the 'General' tab selected. It contains various search criteria fields and dropdown menus. The 'Group' dropdown is set to '2019 Senior Choir'. The 'Terms in School' section has 'Not Specified' selected. The 'Find' button is highlighted.

Field	Value
Surname/Ref. No.	
Preferred Name	
First Name	
Legal Surname	
Contact Surname	
Roll Status	Current
Year Group	--n/s--
Form	--n/s--
House	--n/s--
Group Type	2019 Music
Group	2019 Senior Choir

Global Name Search: All Names (Excluding History) [v]  
Terms in School: ☒ Not Specified, ☐ More than, ☐ Less than (0), ☐ Equal to  
☐ Show Inactive Parameters in Dropdown Lists  
Find Close

- Select All** the students from the list
- Click Send Letter 
- Select the following options

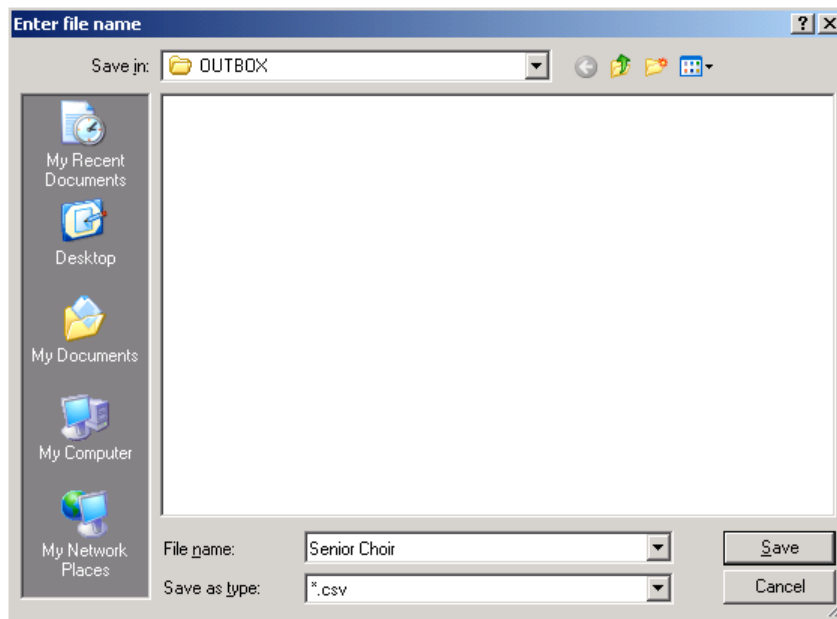


The 'Mailing Options' dialog box is shown. It contains options for creating letters and merging systems. The 'Produce a CSV file' option is selected under the 'Merging system' section. The 'Send to all Contacts marked as Family Mail Marker' checkbox is checked. The 'OK' button is highlighted.

33 records in the browse set  
☒ Create letters for all students in the browse set  
☐ Create a letter for the current student only  
Merging system  
☐ Send letter/s to "Word" using a ".kst" template  
☒ Produce a CSV file for use in a subsequent mail-merge  
☒ Send to all Contacts marked as Family Mail Marker  
OK Cancel

- Click **OK**

**Note:** The file will default to save in the *Integris Outbox*, however you can save it to your desktop or any other location.



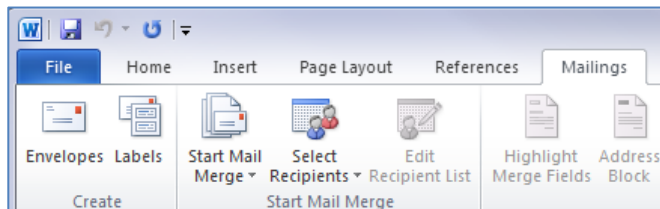
- Give the export file an appropriate name
- Navigate to your desktop
- Click **Save** and **OK**

## 15.2.2 Creating a Mail Merge Letter in Word – Using Letters

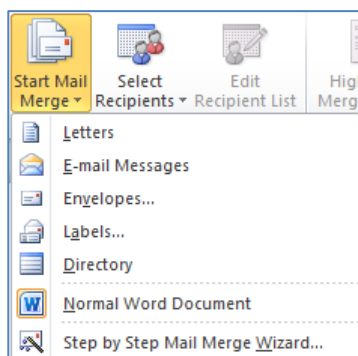
### Activity

A sample letter can be found in the Administration Manager Supplement on page 22.

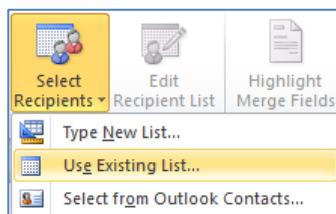
- Open a new Microsoft Word document
- Click on the **Mailings** Menu



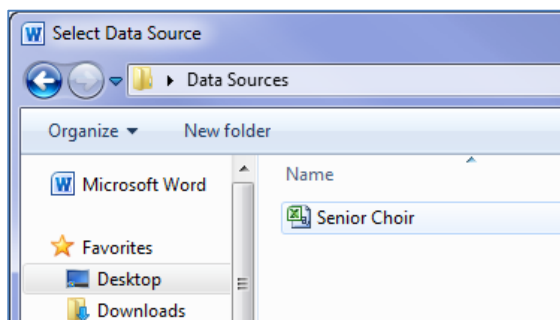
- Click on the small arrow at the bottom of the **Start Mail Merge** icon



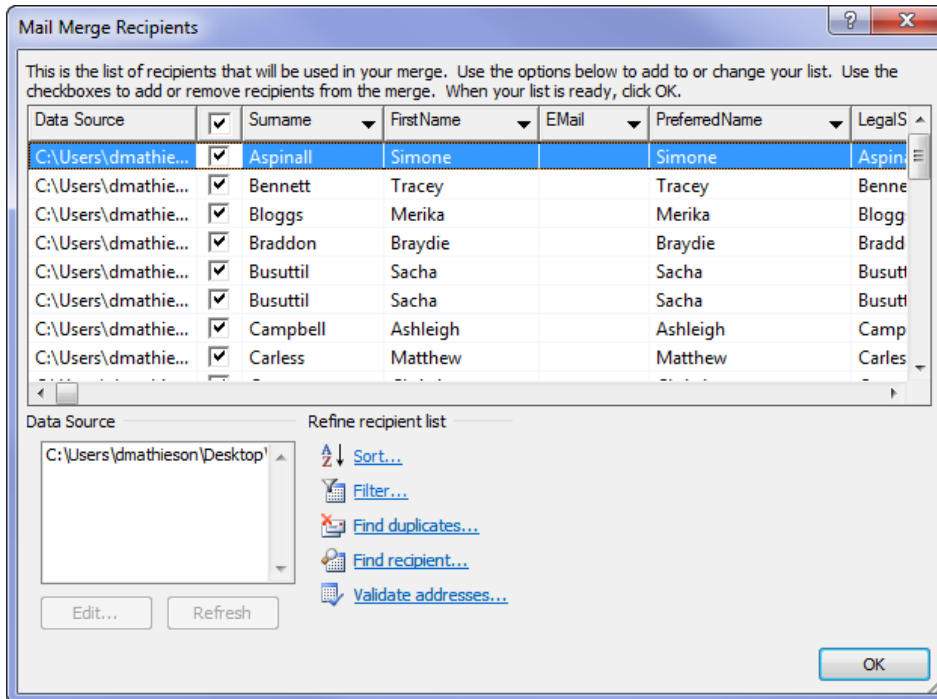
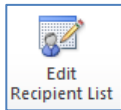
- Select **Letters**
- Click on Select Recipients and choose **Use Existing List**



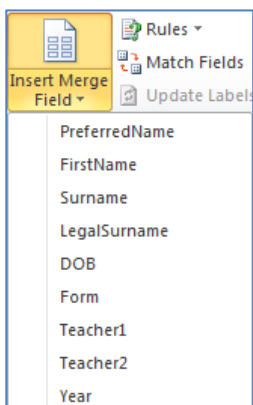
- Browse to the csv file on your desktop



- Highlight and Click **Open or Double Click**
- Click the Edit Recipient List icon



- Click **OK** for all recipients or select those required
- You are now ready to start creating your letter
- Place your cursor where you want the first address line in your document to appear
- Click on the small arrow at the bottom of the **Insert Merge Field** icon

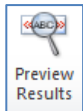


All available Mail Merge fields will show in this list.

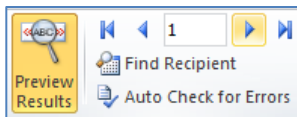
- Click on **AddeeSalutation**
- Move your cursor to the next line
- Click on the small arrow at the bottom of the **Insert Merge Field** icon
- Click on **AddeeAddL1**

Use the Sample on **Page 25** of your Admin Manager Supplement to type a short letter for the Choir activity and insert all the Mail Merge fields as displayed.

- Click **Preview Results** when you have completed your letter



- You can preview other letters by scrolling through the recipients with the scroll arrows.

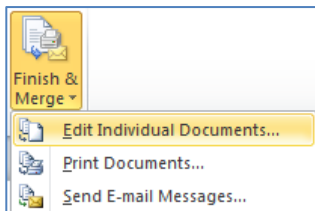


If there are mistakes in your letter:

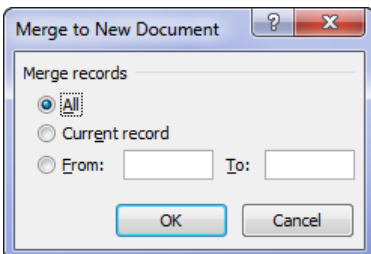
- Click **Preview Results** again and make any changes required

When you are happy with your letter:

- Click on **Finish and Merge**
- Select **Edit Individual Documents**



- Click **OK** for **All**

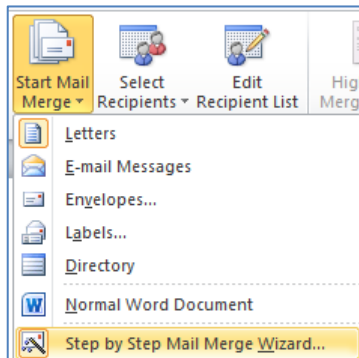


- View your merged letters
- Close the letters but do not close word

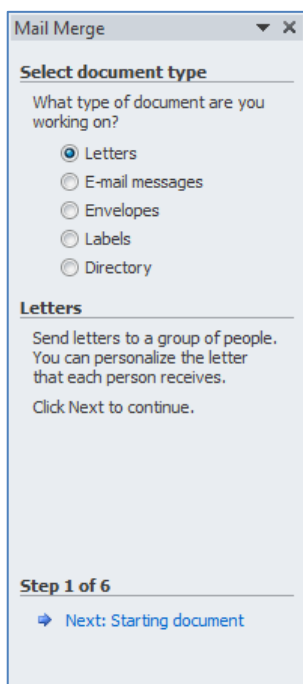
### 15.2.3 Creating a Mail Merge Letter in Word – Using the Mail Merge Wizard

If you are accustomed to using the Mail Merge Wizard available in Word 2003, the same Wizard can still be used. A summary of those steps are outlined below.

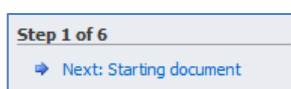
- Select **Step by Step Mail Merge Wizard** from the **Start Mail Merge** Icon



The Mail Merge Wizard will open on the right hand side of the document



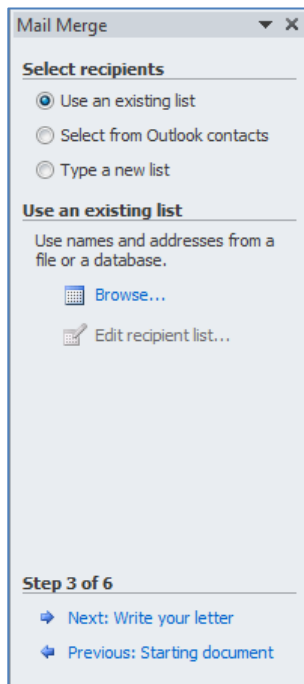
- Select the document you require and Click on **Next: Starting document**



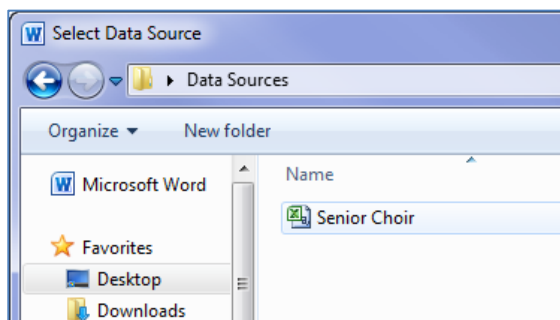
- Click **Next: Select Recipients**



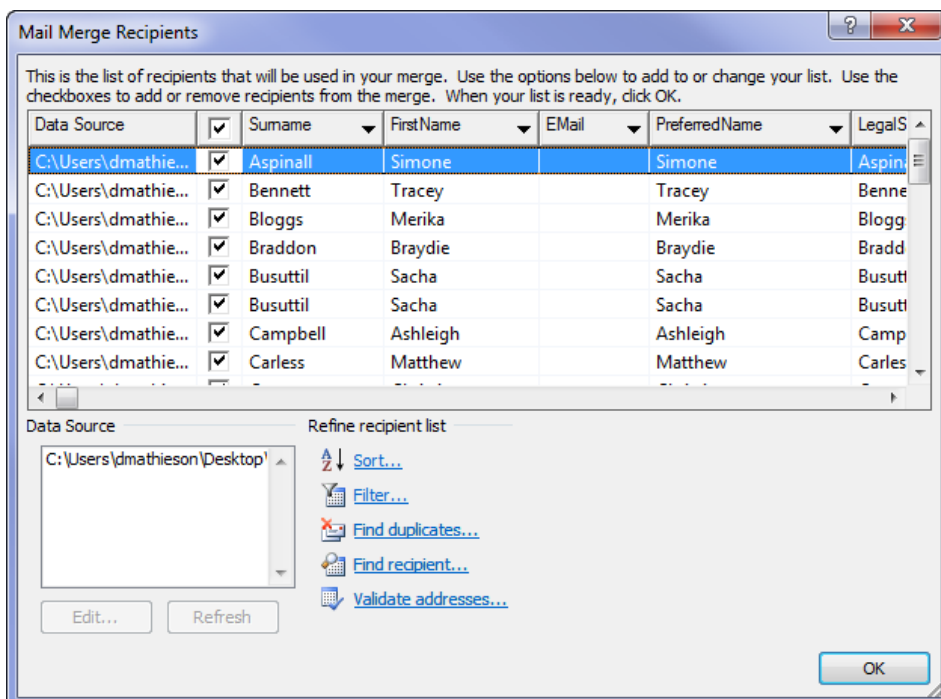
- Ensure **Use an Existing List** is selected and click on **Browse**



- Navigate to where you have saved your data source and Open the file



- View your Recipient List and select the recipients required and click OK

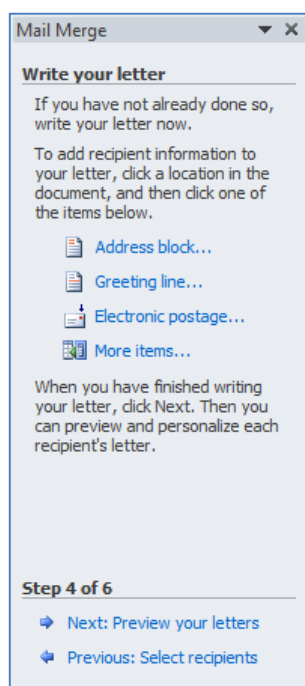


- Click Next: Write your letter

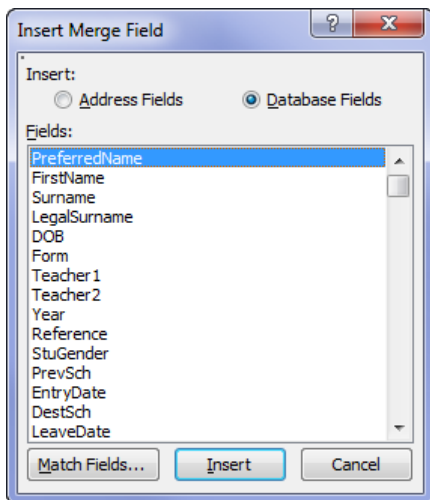
#### Step 3 of 6

- ➔ Next: Write your letter
- ➔ Previous: Starting document

- To Insert Mail Merge Fields click on the link to **More Items**



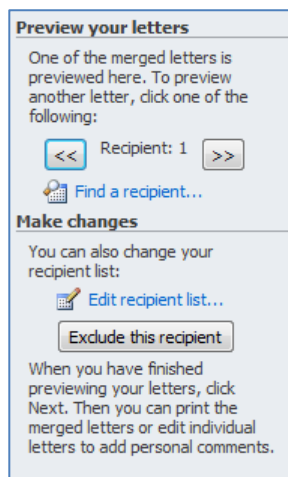
- The available fields will display



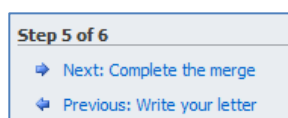
**Note:** Fields can be inserted by double clicking or highlighting and clicking Insert. If you need to re-position your cursor in the document, you must close this window, move your cursor and click on More Items again.

Once you have inserted all your items and typed your document:

- Click on **Next: Preview your Letters**
- You can scroll through and view all recipients' letters or edit the recipient list at this point.

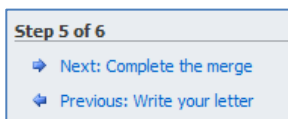


- If you find errors, click **Previous: Write your letter**

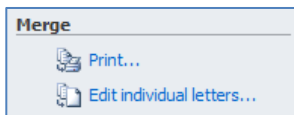


- This allows you to return to the previous page to edit the letter.

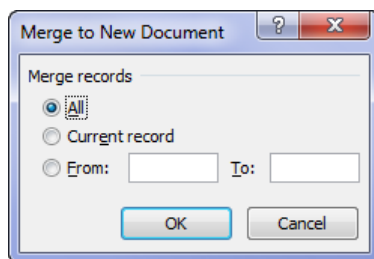
- If you are ready to finish the Mail Merge:
- Click Next: Complete the merge



- Letters can be printed at this point. If you wish to open the letters as a new document:
- Click on Edit individual letters



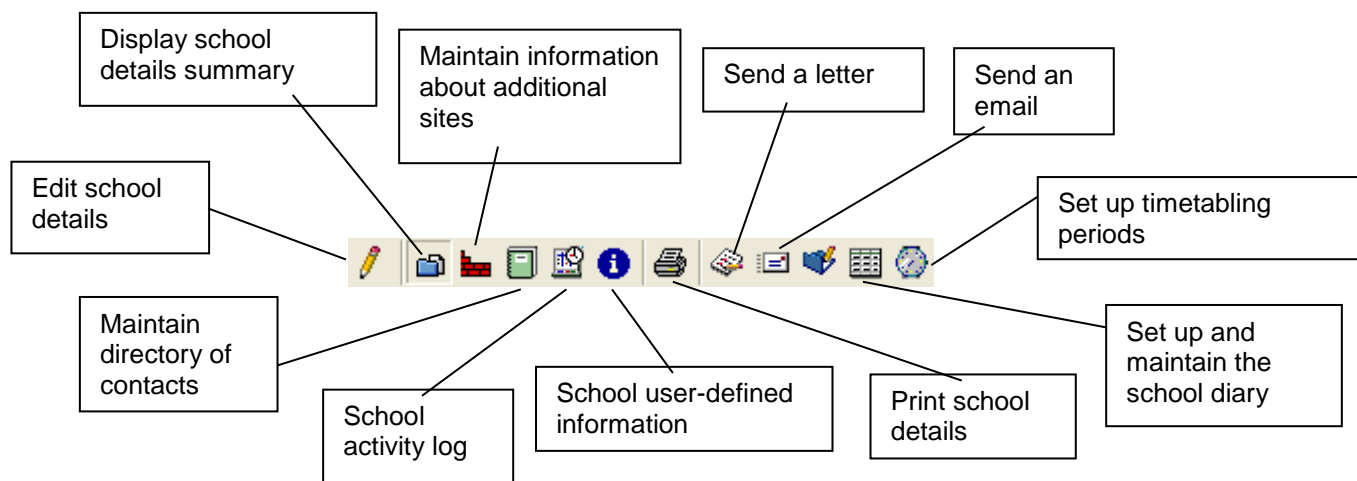
You can open All Letters or select particular letters if you know which recipient you wish to edit.



## 16 School Details

### General > School Details





The **School Details** window is very similar to that in **Student Details** and some of the icons are the same. The main tools within **School Details** are:



Edit School Details  enables the user to maintain details in all areas of the school's details.

### Activity

View each of the following windows in **School Details**.




- Sites 
- Directory 
- School Activity 
- School Diary 
- Timetabling Periods 

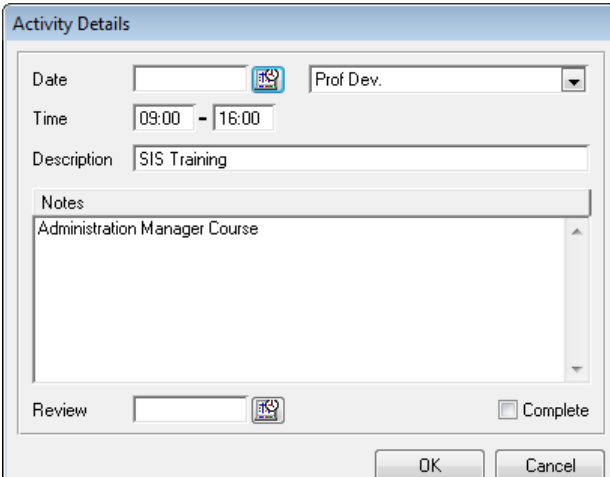
## 16.1 Entering Events in the School Diary

### Activity

#### General > School Details


It is possible to enter events that may be occurring at the school during the Term or Year and then print a Term or Year planner to display the up and coming events.

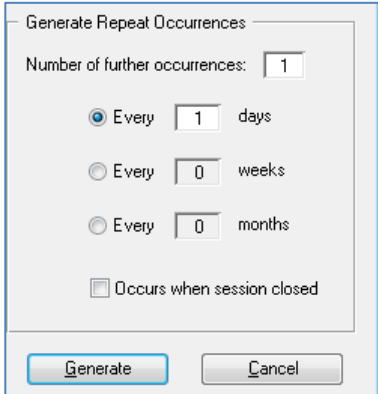
- Select Display School Diary 
- Click Year View 
- Select YESTERDAY's date
- Click Add 
- Enter the following information and click **OK**



The 'Activity Details' dialog box contains the following fields and controls:

- Date:** A text input field with a calendar icon.
- Time:** A time range selector showing '09:00' to '16:00'.
- Description:** A text input field containing 'SIS Training'.
- Notes:** A text area containing 'Administration Manager Course'.
- Review:** A text input field with a calendar icon.
- Complete:** A checkbox.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

- Click Recurring Events 
- Enter the following information



The 'Generate Repeat Occurrences' dialog box contains the following fields and controls:

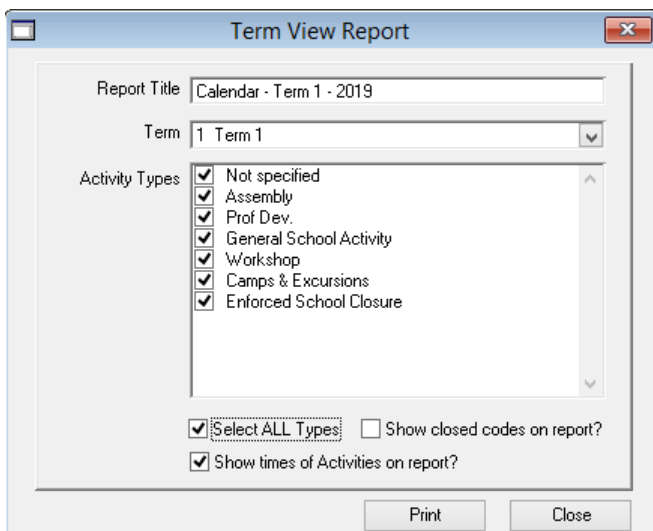
- Number of further occurrences:** A text input field with the value '1'.
- Frequency options:**
  - ☒ Every  days
  - ☐ Every  weeks
  - ☐ Every  months
- Occurs when session closed:** A checkbox.
- Buttons:** 'Generate' and 'Cancel' buttons at the bottom.

- Click **Generate** and **Yes**

### 16.1.1 Printing the Term Planner

#### Activity

- Click Term View Report 
- Select the CURRENT TERM from the **Term** menu
- Check **Select ALL Types**



- **Print** the planner to the screen

## 17 Year End

The **Year End** function is run at the end of the academic year-end in order to move all students up a year and move the admissions students onto the current roll. In training, we will be working with a school that has Years K-12 and we will demonstrate two of the three Year End methods for allocating proposed years and forms for the following academic year.

The following list outlines the steps involved in the Year End process. Much of the process can be set up earlier in the year, with the final Year End rollover being run at a time that suits your school, which is either at the end of the current year or the beginning of the next year.

Tick each step as it is completed.

## Year End Checklist

Step	Function	Completed
1.	Bring your datafile up to date	
2.	Print form lists for all forms and years	
3.	Check Intake for Secondary Schools	
4.	Check the leavers year in School Details	
5.	Back up the datafile	
6.	Set up the school calendar for the new year	
7.	Defining Semester/Timetabling Periods	
8.	Set up form descriptions for the new year	
9.	Set up Leavers	
10.	Increment student's proposed years and proposed forms	
11.	Print reports showing proposed years and forms	
12.	Print student lists for future reference	
13.	Back up Data File	
14.	Process Year End	
15.	Check Year End was successful	
16.	Process Admissions Students	
17.	Move External Roll Students to the Former Roll	
18.	Changing Student FTE	
19.	Update Staff Details	
20.	Update Form Descriptions	
21.	Repeating Student; check they are flagged	
22.	Assign Family Representatives	
23.	Print State Archives Report	
24.	Set up New Attendance Year	
25.	Notification of Transfer	
26.	Checking Student's Destination School	
27.	Purge the Audit Trail	

**Note: Step 24 is not demonstrated in training. Instructions on how to do this can be obtained in the Admin End of Year Fact Sheet.**




## 17.1 Bring your Data File up to Date

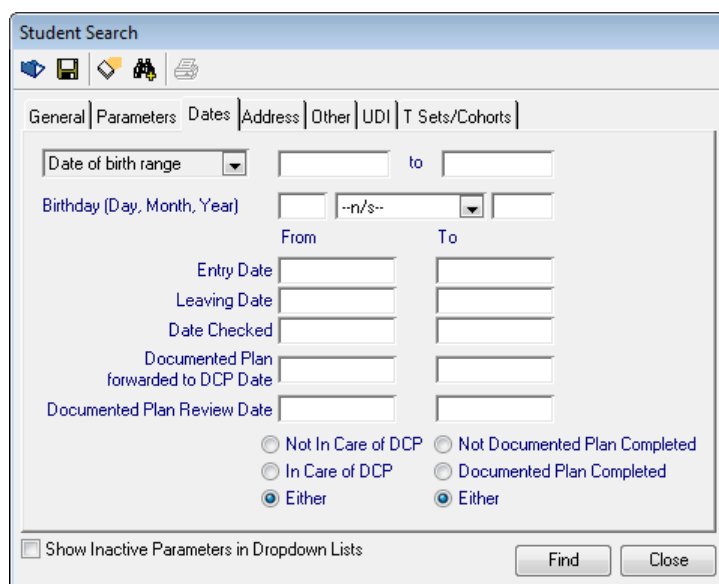
Ensure students who have left have been moved to the Former Roll and students coming to the school next year have been added to the Admissions Roll. If the Lesson Attendance module is being used, make sure attendance data is up to date.

**DO NOT MOVE LEAVERS TO THE FORMER ROLL. THIS IS CARRIED OUT AUTOMATICALLY WHEN PROCESSING YEAR END**


### Activity

#### General > Student Details

- Find  the students who started yesterday by putting in the **Entry Dates**



The screenshot shows the 'Student Search' dialog box with the 'Dates' tab selected. The 'Entry Date' field is highlighted. The 'Find' button is visible.

- Check that each one has been assigned to a **Year** and **Form**
- If not, click **Edit**  and assign Year and Forms

## 17.2 Print Form Check Lists for all Forms/Years

It is recommended that users create a checklist for each Form/Year Group in order to show current and Proposed Forms/Years.

Setting up this report as follows will produce a checklist for use with the Year End process. Use the lists to record Proposed Forms against Current Forms.

For each form group:

- Write the name of the student's new (Proposed) Form against the Current Form.
- Mark the names of individual students who will be moving to Forms/Years that are different from the proposed Form/Year for the remainder of students in the list. Some students may be repeating their current year.
- On the lists, mark as 'Leaver' any students in the Leavers year (that is Year 6 in most primary schools and Year 12 in secondary schools), as well as any other students who will be leaving.

## Activity

### WA Reports > Reports > WA Reports> Standard Student Checklist

- Click **Standard Student Check List**
- Enter **Proposed Year /Form Lists** as the title

The screenshot shows the 'Reports' window with the 'Standard Student Check List' selected in the left-hand list. The main area displays the report configuration for 'West Coast District High School' with the title 'Proposed Year/Form Lists'. The 'Options' section on the right has 'Small Font Report' and 'Preferred Name' selected. The 'Title' field contains 'Proposed Year/Form Lists' and the 'Footer' field contains 'Please use these checklists to record forms for students for next year'. The 'Print' and 'Cancel' buttons are at the bottom right.

- Type any directions to staff in the Footer

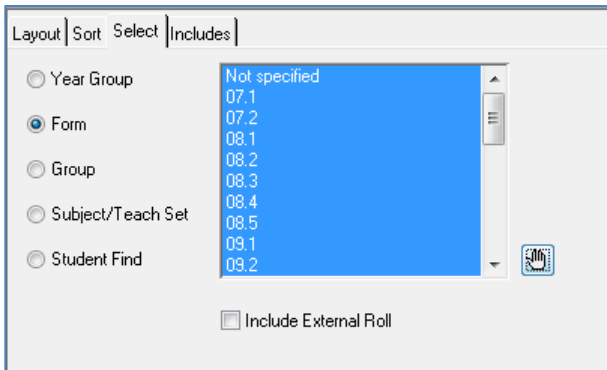
**Note: If your school does not have Form groups, you could use the Current Roll Report with user Font Size (located in Admin Reports> Roll Reports). Sort by Year and Surname.**

- Click on the **Sort** tab and double click on **Form** and then **Year**
- Check the **Total** and the **Page** boxes next to **Form**

The screenshot shows the 'Sort' tab in the Reports window. The 'Sort Field' list on the left includes 'Surname', 'First Name', 'Sex', 'DOB', and 'House'. The 'Form' field is selected in the 'Sort Field' list. The 'Total' and 'Page' checkboxes are checked for the 'Form' field. The 'Year' field is also selected in the 'Sort Field' list.

Sort Field	Total	Page
1 Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 Year	<input type="checkbox"/>	<input type="checkbox"/>

- Click on the **Select** tab and choose **Form**
- Click Select All 



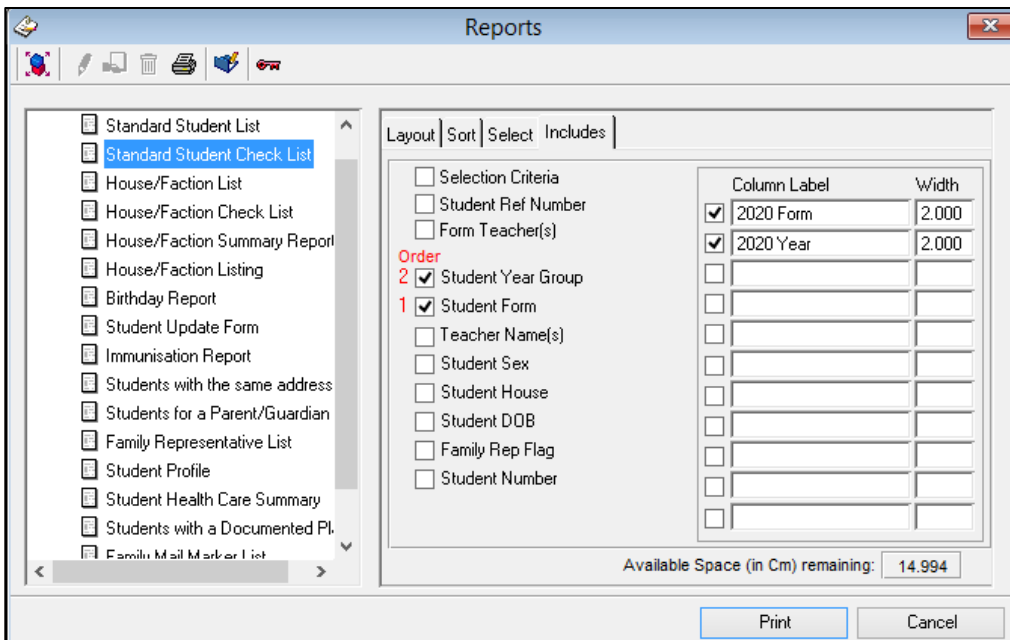
Layout | Sort | **Select** | Includes

☐ Year Group  
☒ **Form**  
☐ Group  
☐ Subject/Teach Set  
☐ Student Find

Not specified  
07.1  
07.2  
08.1  
08.2  
08.3  
08.4  
08.5  
09.1  
09.2

☐ Include External Roll

- Click on the **Includes** tab and enter the following information



Reports

Standard Student List  
Standard Student Check List  
House/Faction List  
House/Faction Check List  
House/Faction Summary Report  
House/Faction Listing  
Birthday Report  
Student Update Form  
Immunisation Report  
Students with the same address  
Students for a Parent/Guardian  
Family Representative List  
Student Profile  
Student Health Care Summary  
Students with a Documented Pl.  
Family Mail Marker List

Layout | Sort | Select | **Includes**

☐ Selection Criteria  
☐ Student Ref Number  
☐ Form Teacher(s)  
 Order  
 2 ☒ Student Year Group  
 1 ☒ Student Form  
☐ Teacher Name(s)  
☐ Student Sex  
☐ Student House  
☐ Student DOB  
☐ Family Rep Flag  
☐ Student Number


Column Label	Width
<input checked="" type="checkbox"/> 2020 Form	2.000
<input checked="" type="checkbox"/> 2020 Year	2.000
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

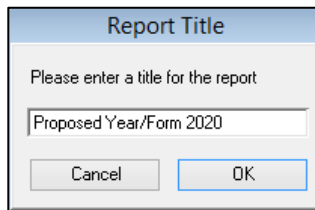
Available Space (in Cm) remaining: 14.994

Print Cancel

- **Print** to the screen
- Close report

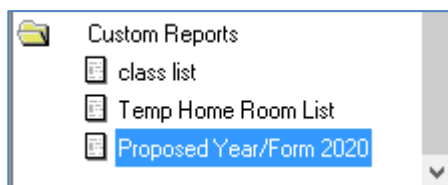
## Save as a Custom Report

- Click Save as a Custom Report 
- Enter a name for the Custom Report



A dialog box titled "Report Title" with a light blue header. The main area contains the text "Please enter a title for the report" above a text input field. The input field contains the text "Proposed Year/Form 2020". At the bottom, there are two buttons: "Cancel" on the left and "OK" on the right.

- Click **OK**
- View the Report underneath the Custom Reports folder



## 17.3 Check Intake Year for Secondary Schools

Secondary Schools will need to check their Intake Year is set to Year 7 in Year Groups

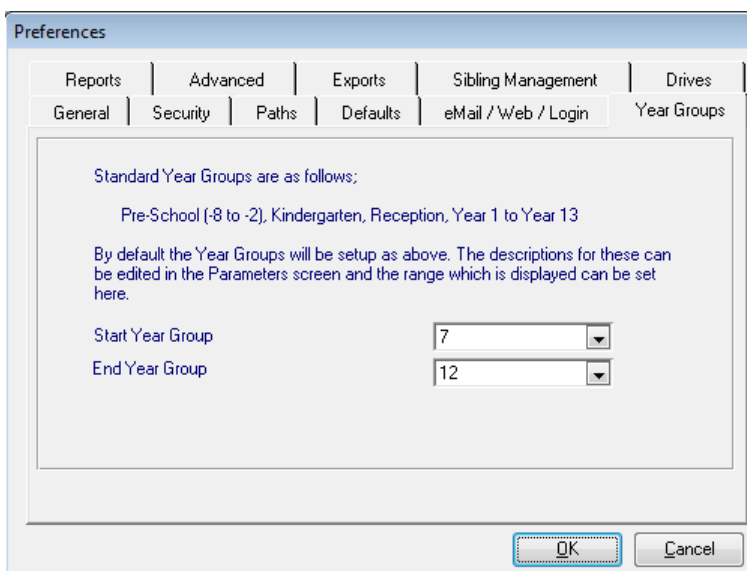
### Activity

#### General > Control > Preferences

- Select the **Year Groups** Tab



- Ensure the **Start Year Group** is set to **Year 7**



- Click **Cancel** as we will not change the Start Year Group for the Training datafile


**Note: Primary schools should also ensure their End Year Group is set to Year 6.**

## 17.4 Check Leavers Year in School Details

This is necessary so that the students in the final year of the school will automatically be transferred to the **Former** roll as part of the Year End process. The **Leavers Year** is probably already set up; however check that it is accurate.

### Activity

#### General > School Details

- Check the **Leavers Year** is correct
- Click  to make any changes
- Primary Schools will have their Leavers' Year set to Year 6

Intake Year	K
Leavers Year	6

- Secondary Schools will have their Leavers' Year set to Year 12

Intake Year	7
Leavers Year	12

We are working with a District High School, so the Intake Year will be K and the Leavers' Year will be Year 12.

Intake Year	K
Leavers Year	12

- Click **Cancel** and **Yes** as we will not make any changes

## 17.5 Back up the Data File

It is necessary to make a copy of the data file as it stands before you set up a new academic year, in case you inadvertently delete the current year's data. This involves making a copy of the current year's data file and storing it in a folder where it is accessible if needed.

The SIS Backup Wizard should be used to make a backup of your data at this time.

### **IMPORTANT:**

***You will be asked to repeat this backup prior to processing Year End (Step 13) because of any changes you have made to the data file between now and then.***





## 17.6 Set up the School Calendar for the New Year

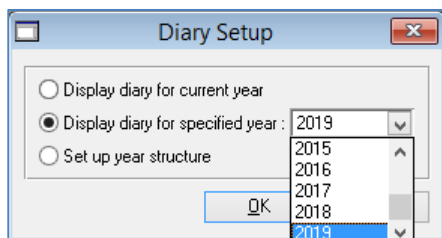
### Activity

#### General > School Details

#### Set up the new school year for (2020)

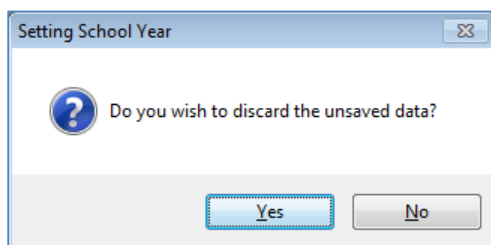
**Note:** Always take a back-up your data file prior to setting up a new year.

- Click Display School Diary 
- Click Set Up School Year 
- Click **Display Diary for Specified Year** to double check that the following year has not already been set up




- Click **Set up year structure**
- Click **OK**
- Enter the year in the **School Year** field and press <Tab>

School Year




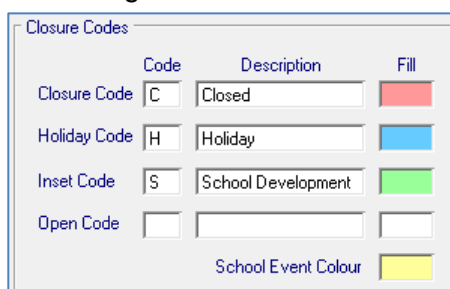
- Click **Yes** when asked if you want to discard last year's data

- Change 


Inset Code	I	Inset	
------------	---	-------	---

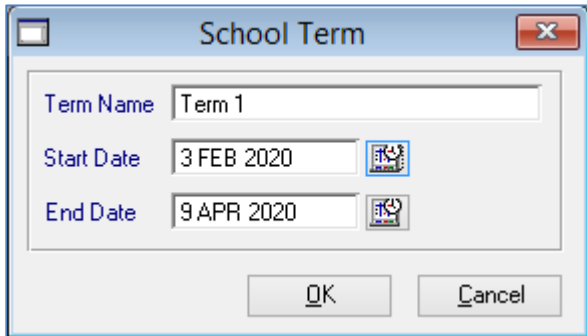
 to 

Inset Code	S	School Development	
------------	---	--------------------	---



### Set up terms within the new year:

- Click Add Term  to add details of terms, ( these are entered one at a time), dates may be typed in or selected via the Activity Calendar button

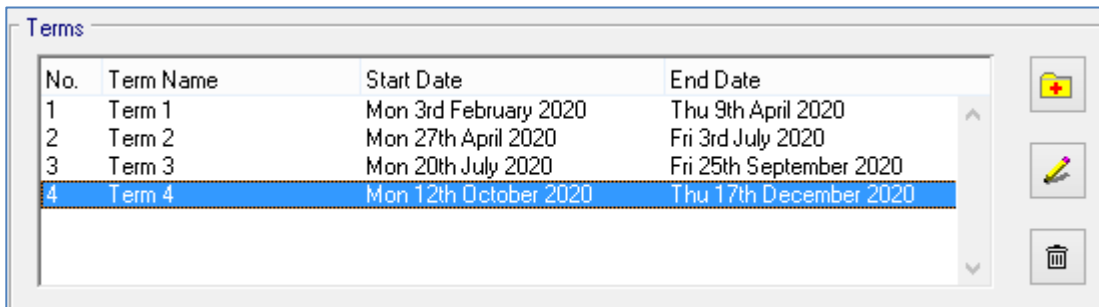


A dialog box titled "School Term" with a close button (X) in the top right corner. It contains three input fields: "Term Name" with the text "Term 1", "Start Date" with the text "3 FEB 2020" and a calendar icon, and "End Date" with the text "9 APR 2020" and a calendar icon. At the bottom are "OK" and "Cancel" buttons.

- Click **OK**

**Note:** These dates were preliminary dates at the time of the Administration Training Notes updates. Please refer to <http://www.det.wa.edu.au/education/termdates/to> confirm dates prior to input.

- Add the other terms for 2020



A window titled "Terms" showing a list of school terms. The list has four columns: "No.", "Term Name", "Start Date", and "End Date". There are four terms listed, with the fourth term selected. To the right of the list are three icons: a folder with a plus sign, a pencil, and a trash can.

No.	Term Name	Start Date	End Date
1	Term 1	Mon 3rd February 2020	Thu 9th April 2020
2	Term 2	Mon 27th April 2020	Fri 3rd July 2020
3	Term 3	Mon 20th July 2020	Fri 25th September 2020
4	Term 4	Mon 12th October 2020	Thu 17th December 2020

**School Year** X

School Year

**Weekly Closure Pattern**

	AM	PM
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday	Closed	Closed
Sunday	Closed	Closed

**Closure Codes**

	Code	Description	Fill
Closure Code	C	Closed	<div style="width: 20px; height: 10px; background-color: red;"></div>
Holiday Code	H	Holiday	<div style="width: 20px; height: 10px; background-color: blue;"></div>
Inset Code	S	School Development	<div style="width: 20px; height: 10px; background-color: green;"></div>
Open Code			<div style="width: 20px; height: 10px; background-color: white;"></div>

School Event Colour

**Terms**

No.	Term Name	Start Date	End Date
1	Term 1	Mon 3rd February 2020	Thu 9th April 2020
2	Term 2	Mon 27th April 2020	Fri 3rd July 2020
3	Term 3	Mon 20th July 2020	Fri 25th September 2020
4	Term 4	Mon 12th October 2020	Thu 17th December 2020



+

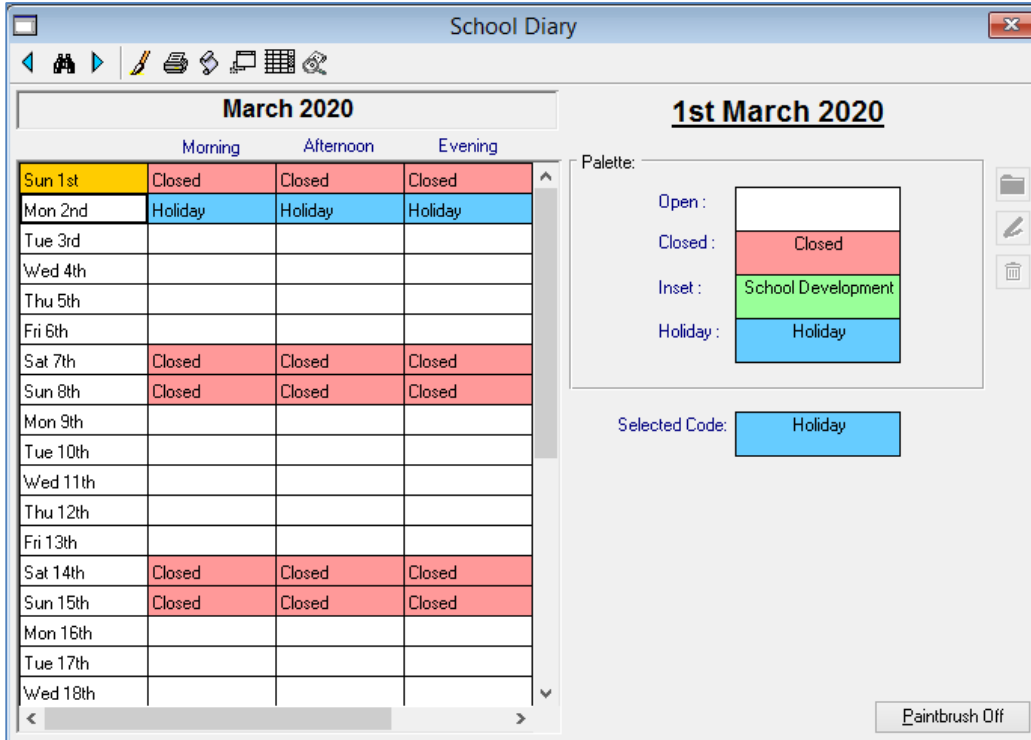
✎

✖

***Note: Terms are always entered as starting on a Monday. If the school is not open on the Monday, it may be entered as a Closed day in the School Diary.***

## Identify days within the school year when the school will be closed

- In the School Diary window click on Toggle Paintbrush 
- Click in the blue **Holiday** cell
- Use the blue chevrons  to navigate to March
- Enter Monday **2<sup>nd</sup> March** as Public Holiday




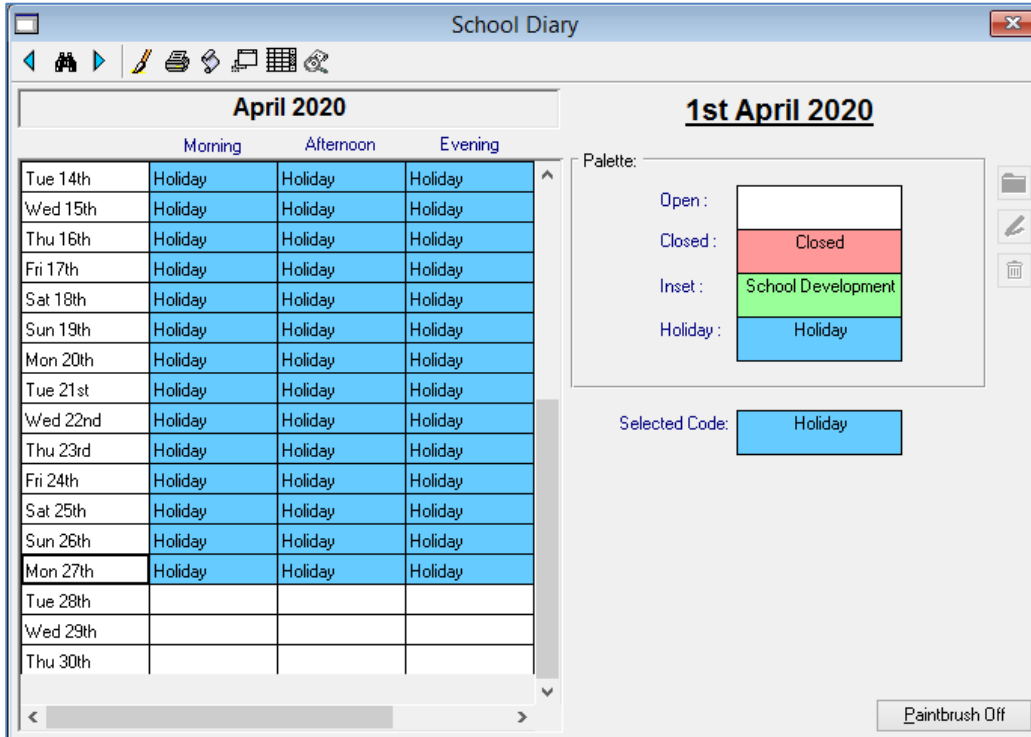
The screenshot shows the 'School Diary' application window. The main calendar view displays the month of March 2020. The days are organized into columns for Morning, Afternoon, and Evening. The status for each day is indicated by a color-coded cell: 'Closed' (red), 'Holiday' (blue), and 'School Development' (green). The 1st of March is highlighted as a 'Holiday' (blue cell). To the right of the calendar, there is a 'Palette' section with three color-coded boxes: 'Closed' (red), 'School Development' (green), and 'Holiday' (blue). Below the palette, the 'Selected Code' is set to 'Holiday'. At the bottom right of the window, there is a 'Paintbrush Off' button.

	Morning	Afternoon	Evening
Sun 1st	Closed	Closed	Closed
Mon 2nd	Holiday	Holiday	Holiday
Tue 3rd			
Wed 4th			
Thu 5th			
Fri 6th			
Sat 7th	Closed	Closed	Closed
Sun 8th	Closed	Closed	Closed
Mon 9th			
Tue 10th			
Wed 11th			
Thu 12th			
Fri 13th			
Sat 14th	Closed	Closed	Closed
Sun 15th	Closed	Closed	Closed
Mon 16th			
Tue 17th			
Wed 18th			

**Note:** Schools may conduct School Development Days prior to the students' return. As the School Calendar is set up to commence on Monday 2<sup>nd</sup> February, we are unable to assign Development Days in January.

**Hint:** Click on the actual date. This will highlight all 3 cells. To correct an error, click in the white cell, click on the error and reselect the correct colour code

- Use the blue chevrons  to navigate to **April**
- Enter **Monday 27th** as a public holiday




**School Diary**

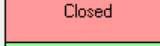
**April 2020**

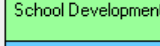
	Morning	Afternoon	Evening
Tue 14th	Holiday	Holiday	Holiday
Wed 15th	Holiday	Holiday	Holiday
Thu 16th	Holiday	Holiday	Holiday
Fri 17th	Holiday	Holiday	Holiday
Sat 18th	Holiday	Holiday	Holiday
Sun 19th	Holiday	Holiday	Holiday
Mon 20th	Holiday	Holiday	Holiday
Tue 21st	Holiday	Holiday	Holiday
Wed 22nd	Holiday	Holiday	Holiday
Thu 23rd	Holiday	Holiday	Holiday
Fri 24th	Holiday	Holiday	Holiday
Sat 25th	Holiday	Holiday	Holiday
Sun 26th	Holiday	Holiday	Holiday
Mon 27th	Holiday	Holiday	Holiday
Tue 28th			
Wed 29th			
Thu 30th			

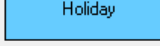
**1st April 2020**


Palette:

Open : 

Closed :  Closed

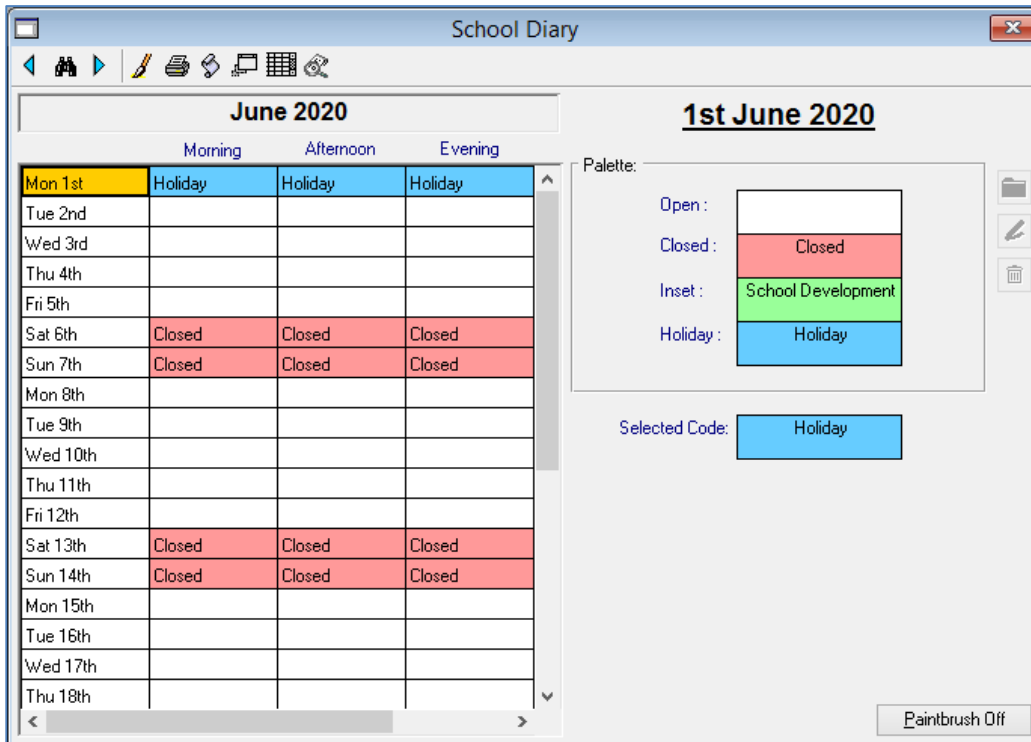
Inset :  School Development

Holiday :  Holiday

Selected Code:  Holiday

Paintbrush Off

- Use the blue chevrons  to navigate to **June**
- Enter **Monday 1st June** as a public holiday




**School Diary**

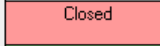
**June 2020**

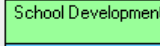
	Morning	Afternoon	Evening
Mon 1st	Holiday	Holiday	Holiday
Tue 2nd			
Wed 3rd			
Thu 4th			
Fri 5th			
Sat 6th	Closed	Closed	Closed
Sun 7th	Closed	Closed	Closed
Mon 8th			
Tue 9th			
Wed 10th			
Thu 11th			
Fri 12th			
Sat 13th	Closed	Closed	Closed
Sun 14th	Closed	Closed	Closed
Mon 15th			
Tue 16th			
Wed 17th			
Thu 18th			

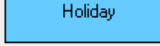
**1st June 2020**

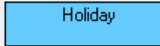
Palette:

Open : 

Closed :  Closed

Inset :  School Development

Holiday :  Holiday

Selected Code:  Holiday

Paintbrush Off

- Navigate to **July**
- Change the Paintbrush Code to green School Development
- Enter **Monday 20<sup>th</sup> July** as a **School Development** day

The screenshot shows the 'School Diary' application window. The main calendar view is for July 2020, with columns for Morning, Afternoon, and Evening. The 20th of July is highlighted in green and labeled 'School Development'. To the right, a 'Palette' section shows color-coded options: Open (white), Closed (red), Inset (green), and Holiday (blue). The 'Selected Code' is set to 'School Development'. A 'Paintbrush Off' button is located at the bottom right of the palette area.

	Morning	Afternoon	Evening
Wed 8th	Holiday	Holiday	Holiday
Thu 9th	Holiday	Holiday	Holiday
Fri 10th	Holiday	Holiday	Holiday
Sat 11th	Holiday	Holiday	Holiday
Sun 12th	Holiday	Holiday	Holiday
Mon 13th	Holiday	Holiday	Holiday
Tue 14th	Holiday	Holiday	Holiday
Wed 15th	Holiday	Holiday	Holiday
Thu 16th	Holiday	Holiday	Holiday
Fri 17th	Holiday	Holiday	Holiday
Sat 18th	Holiday	Holiday	Holiday
Sun 19th	Holiday	Holiday	Holiday
Mon 20th	School Development	School Development	School Development
Tue 21st			
Wed 22nd			
Thu 23rd			
Fri 24th			
Sat 25th	Closed	Closed	Closed


- Turn the paintbrush off  and Close


## 17.7 Defining Semester/Timetabling Periods

### General > School Details > Timetabling Periods

Timetabling Periods are required for Timetabling, and are used for calculating the number of student half day absences in Formal Reports. Term dates must be entered in the School Calendar before Timetabling Periods can be created.

Selecting the  icon will create semester dates.

Selecting the  icon will create term dates.

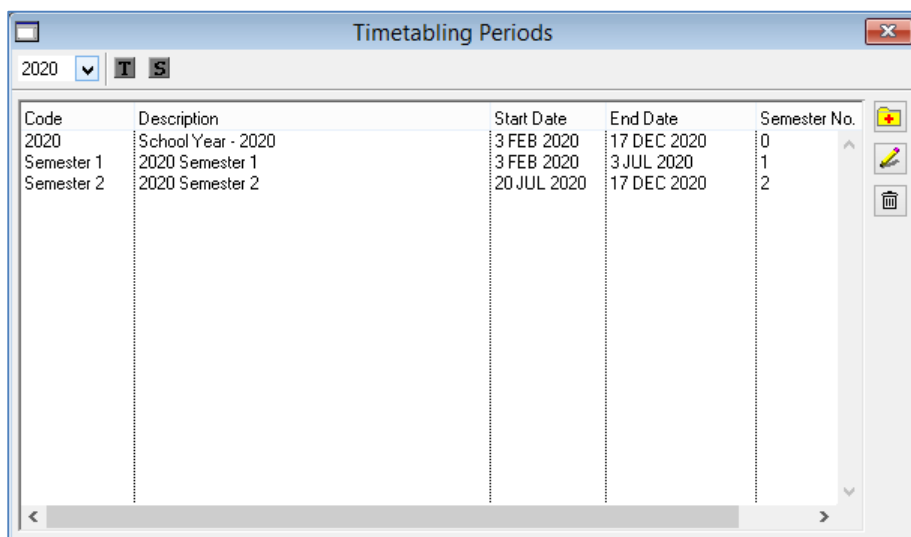
Selecting  will allow users to create customised Timetabling Periods. Schools using Timetabling will create the Timetabling Periods they require. Schools not using Timetabling will use the semester Timetabling Periods to enable the reporting of half-day absences in Formal Reports.

### Activity

#### General > School Details

#### Define Semesters 1 and 2

- Click on Timetabling periods 
- Ensure **2020** is selected
- Click on Create Semesters for School diary  to create semester periods



Code	Description	Start Date	End Date	Semester No.
2020	School Year - 2020	3 FEB 2020	17 DEC 2020	0
Semester 1	2020 Semester 1	3 FEB 2020	3 JUL 2020	1
Semester 2	2020 Semester 2	20 JUL 2020	17 DEC 2020	2

**Note: Primary Schools must click on  to create the semester periods for the lesson attendance data for reports to parents to be accurately reported.**

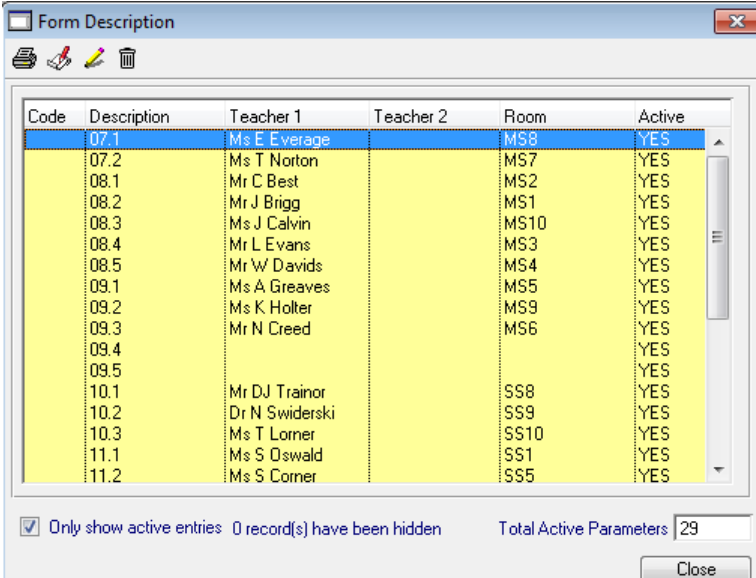
## 17.8 Set up Form Descriptions for the New Year

**Important: Do Not Allocate Teachers at This Time**

### Activity

#### General > Parameters > Form Descriptions

- Double click on **Form Description**

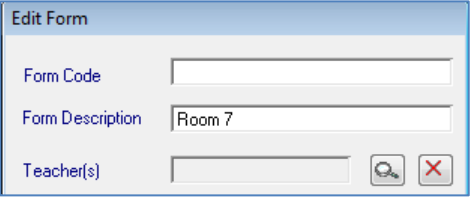


The screenshot shows the 'Form Description' window with a table of parameters. The table has columns: Code, Description, Teacher 1, Teacher 2, Room, and Active. The 'Active' column is highlighted in yellow. The 'Only show active entries' checkbox is checked, and the 'Total Active Parameters' is 29.

Code	Description	Teacher 1	Teacher 2	Room	Active
07.1		Ms E Everage		MS8	YES
07.2		Ms T Norton		MS7	YES
08.1		Mr C Best		MS2	YES
08.2		Mr J Brigg		MS1	YES
08.3		Ms J Calvin		MS10	YES
08.4		Mr L Evans		MS3	YES
08.5		Mr W Davids		MS4	YES
09.1		Ms A Greaves		MS5	YES
09.2		Ms K Holter		MS9	YES
09.3		Mr N Creed		MS6	YES
09.4					YES
09.5					YES
10.1		Mr DJ Trainor		SS8	YES
10.2		Dr N Swiderski		SS9	YES
10.3		Ms T Lerner		SS10	YES
11.1		Ms S Oswald		SS1	YES
11.2		Ms S Corner		SS5	YES

**Note: Do not edit or delete the Not Specified parameter. If the Not Specified parameter isn't in the list, contact your Customer Service Centre before proceeding. Only show active entries is ticked by default.**

- Click Add 
- Enter the **Form Description: Room 7** (skip the first field Form Code)



The screenshot shows the 'Edit Form' window with fields for Form Code, Form Description, and Teacher(s). The Form Description field is filled with 'Room 7'.

- Click **OK**

**Note: The DoE recommends Primary Schools do not use Year Groups to identify Form Rooms. Rooms should be identified as Room 1, Lab 2, Kindy 3 etc.**



## 17.9 Speed Edit Leaver's Details

Use **Speed Edit** to enter a **Leave Date** and **Destination** for your top year group, and for all students who will not remain at the school. This is usually Year 6 students in a primary school, Year 10 students in a District High School and Year 12 students in a Senior High School, as well as any other students known to be leaving at the end of the academic year.

The processing of Leavers is a **two-part function**. **Part One** updates the leaving student's details, for example: What date are they leaving and where are they going? **Part Two** allows the EOY process to automatically move the leaving students to the former roll.


**Note: If the Destination is unknown, use the value Not Specified. If the Destination is known but is not in the list, contact CSC to have it added to your parameter list.**

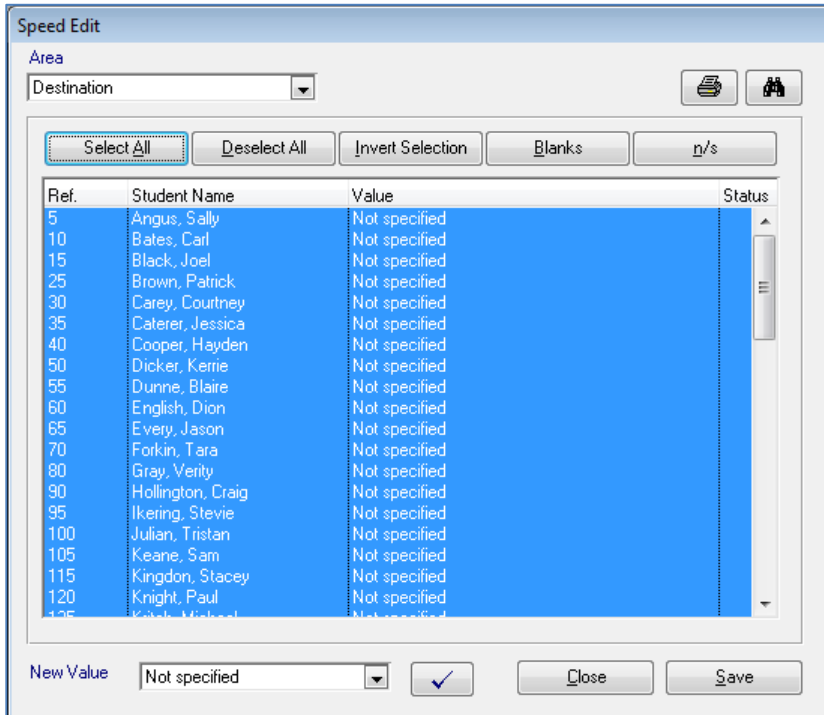
The top year group in this training data file is Year 12. Their **Leave Date** for this school will be **25/10/19** and their **Destination** will be **Not Specified**.

**Do not use Speed Edit to set up Proposed Years or Forms.**

## Activity

### Admin > Speed Edit

- From the **Area** drop down menu choose **Destination**
- Find  the Year 12 students
- Click **Select All**
- Enter the **New Value** as **Not specified**




The Speed Edit dialog box is shown with the 'Area' dropdown set to 'Destination'. The 'New Value' dropdown is set to 'Not specified'. The 'Select All' button is highlighted. The table below shows the list of students and their current values.

Ref.	Student Name	Value	Status
5	Angus, Sally	Not specified	
10	Bates, Carl	Not specified	
15	Black, Joel	Not specified	
25	Brown, Patrick	Not specified	
30	Carey, Courtney	Not specified	
35	Caterer, Jessica	Not specified	
40	Cooper, Hayden	Not specified	
50	Dicker, Kerrie	Not specified	
55	Dunne, Blaire	Not specified	
60	English, Dion	Not specified	
65	Every, Jason	Not specified	
70	Forkin, Tara	Not specified	
80	Gray, Verity	Not specified	
90	Hollington, Craig	Not specified	
95	Ikering, Stevie	Not specified	
100	Julian, Tristan	Not specified	
105	Keane, Sam	Not specified	
115	Kingdon, Stacey	Not specified	
120	Knight, Paul	Not specified	
125	Kitch, Michael	Not specified	

- Click Apply Changes 
- Click **Save** and **Yes**

### Speed Edit **Leave Date**

- Change the **Area** to **Leave Date**
- Click **Select All**
- Select the **New Value** of **25 Oct 2019**
- Click Apply changes 
- Click **Save** and **Yes**

**Notes:** To ensure that both **Destination** and **Leave Date** are correctly processed, **ALWAYS** speed edit the change to the **Destination** first, followed by the change to the **Leave Date**. **Primary Schools** will enter the **Destination** as the **Secondary Schools** that the students will be attending (if known). Otherwise students are marked as **Not Specified**.

## 17.10 Increment Students' Proposed Years and Forms

### Admin > Year End

***Do not use Speed Edit to set up Proposed Years or Forms.***

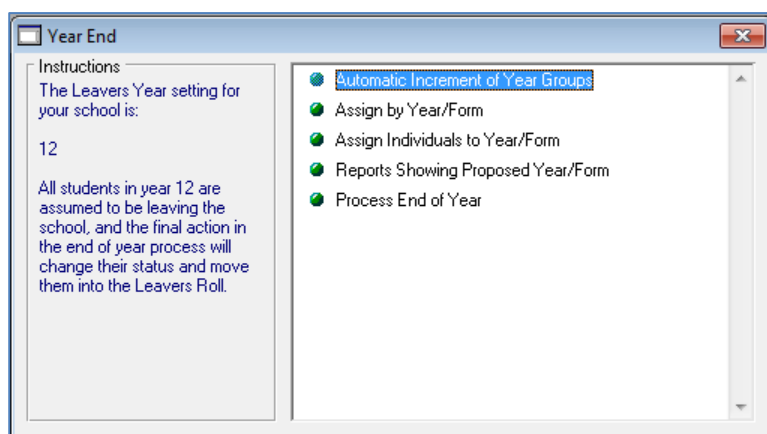
There are three ways to increment the students who are moving up a year within the school:

- Automatic Increment of Year Groups
- Assign by Year/Form
- Assign Individuals to a Year/Form.

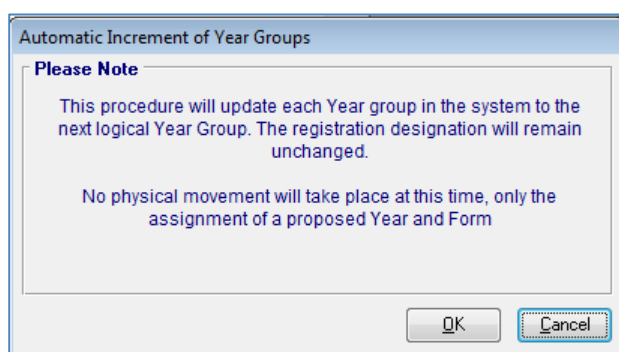
#### Automatic Increment of Year Groups

If students keep the same class names but move up one year, for example, Year 3, Form Room 1 becomes Year 4, Form Room 1.

- Select **Year End** in the **Admin** sidebar.
- Click on the **Automatic Increment of Year Groups**



The following window will be displayed.



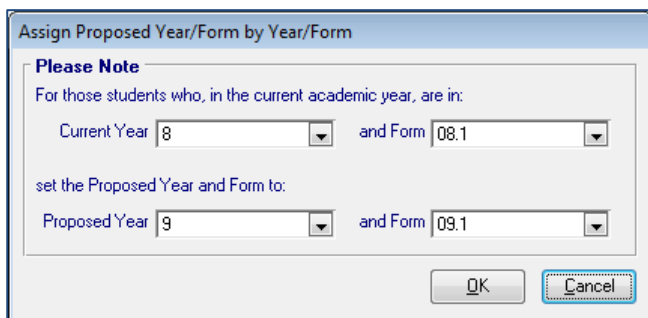
- Click **OK** to proceed.

***Note: Registration designation refers to Form.***

## Assign by Year/Form

If student's Years and Forms are both incremented by one, for example, Year 8 Form 8.1, becomes Year 9 Form 9.1, then choose this option.

- Select **Year End** in the **Admin** sidebar
- Click **Assign by Year/Form**
- Complete for all the Forms, changing the Year and Form

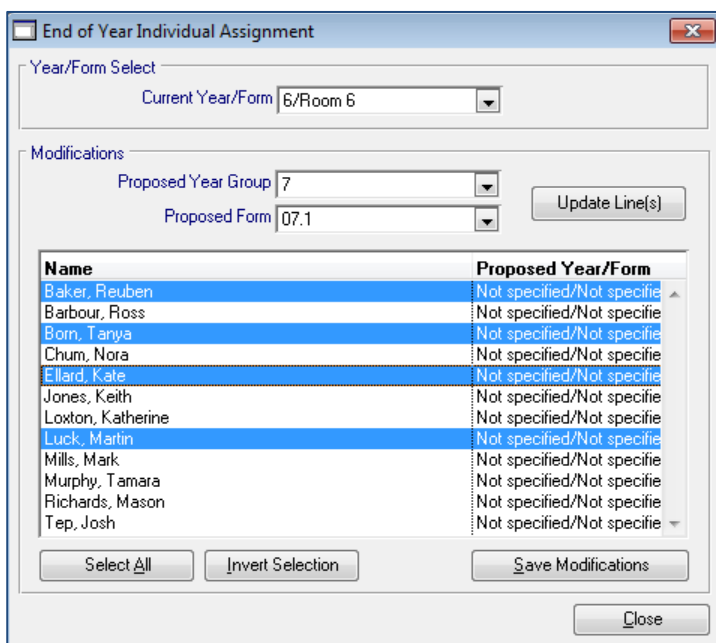


The dialog box is titled "Assign Proposed Year/Form by Year/Form". It contains a "Please Note" section with the text: "For those students who, in the current academic year, are in:". Below this, there are two dropdown menus: "Current Year" set to "8" and "and Form" set to "08.1". Below these, it says "set the Proposed Year and Form to:", followed by another two dropdown menus: "Proposed Year" set to "9" and "and Form" set to "09.1". At the bottom right are "OK" and "Cancel" buttons.

## Assign Individuals to a Year/Form

The third option enables each Form to be allocated a proposed Year and Form, and it also allows for individual students within each Form to be assigned to a different Proposed Year/Form. It is important to allocate a Proposed Year and Proposed Form for Leavers.

- Select **Year End** in the **Admin** sidebar
- Click on **Assign Individuals to a Year/Form**
- Select the **Current Year/Form** to display the current student's names in the **Modifications** pane.
- Highlight students to be allocated a Proposed Year Group and Proposed Form
- Select the **Proposed Year Group and Proposed Form**
- Click **Update Line(s)**



The dialog box is titled "End of Year Individual Assignment". It has a "Year/Form Select" section with a dropdown menu showing "6/Room 6". Below this is a "Modifications" section with two dropdown menus: "Proposed Year Group" set to "7" and "Proposed Form" set to "07.1". To the right of these is an "Update Line(s)" button. Below the dropdowns is a table with two columns: "Name" and "Proposed Year/Form". The table lists several students, with "Baker, Reuben" through "Luck, Martin" highlighted in blue. Below the table are three buttons: "Select All", "Invert Selection", and "Save Modifications". At the bottom right is a "Close" button.

Name	Proposed Year/Form
Baker, Reuben	Not specified/Not specified
Barbour, Ross	Not specified/Not specified
Born, Tanya	Not specified/Not specified
Chum, Nora	Not specified/Not specified
Ellard, Kate	Not specified/Not specified
Jones, Keith	Not specified/Not specified
Loxton, Katherine	Not specified/Not specified
Luck, Martin	Not specified/Not specified
Mills, Mark	Not specified/Not specified
Murphy, Tamara	Not specified/Not specified
Richards, Mason	Not specified/Not specified
Tep, Josh	Not specified/Not specified

- Click **Save Modifications**

- Check that you have allocated a Proposed Year and Form to each student in the Form
- Repeat for each Form

For students in the Leavers year, allocate a **Proposed Year Group** of **Leaver** and **Proposed Form** of **Not specified**.

Name	Proposed Year/Form
Baker, Reuben	Not specified/Not specified
Barbour, Ross	Not specified/Not specified
Born, Tanya	Not specified/Not specified
Chum, Nora	Not specified/Not specified
Ellard, Kate	Not specified/Not specified

### 17.10.1 Year End Assign by Year/Form

#### Activity

##### Admin > Year End > Assign by Year/Form

- Set the **Current Year** as **Year 8** and **Form** as **8.1**
- Set the **Proposed Year** as **Year 9** and **Form** as **9.1**

- Click **OK**
- Continue to process the rest of the Year 8's as in the table below

Current Year	Current Form	Proposed Year	Proposed Form
8	8.2	9	9.2
8	8.3	9	9.3
8	8.4	9	9.4

## Activity

Admin > Year End

**Note:** As the proposed Year/Form for all Year 12s is Leaver / Not Specified, the Assign by Year/Form function could also be used.

Some of the Year 4 students are going into Room 5 and some are going into Room 6

- Click on **Assign Individuals to Year/Form**
- Choose the **Current Year/Form: 4/Room 4**

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 4/Room 4

Modifications  
Proposed Year Group: 5  
Proposed Form: Room 5  
Update Line(s)

Name	Proposed Year/Form
Albert, Jackie	5/Room 5
Baillie, Doyen	5/Room 5
Campbell, Leif	5/Room 5
Dunstan, Jennifer	5/Room 5
Edwards, Julie	5/Room 5
Farmer, Kristof	5/Room 5
Gray, Thi reth	5/Room 5
Jones, Tim	5/Room 5
Marshall, Kristy	5/Room 5
Moor, Chris	5/Room 5
North, Mathew	5/Room 5
Price, Tiffani	Not specified/Not specifie

Select All Invert Selection Save Modifications Close

- Select the students from **Albert, Jackie** to **North, Matthew**
- Choose the **Proposed Year Group: 5**
- Choose the **Proposed Form: Room 5**
- Click on **Update Lines**
- Click **Invert Selection**
- Change the **Room** to **Room 6**
- Click on **Update Line(s)**
- Click **Save Modifications**
- Repeat to set the **Proposed Year** and **Form** for **Years 5, 6** and **Form 7/07.1, 7/07.2 and 12.1** using the following information as a guide

## All of the Year 5 students are going into Year 6 and Room 7

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 5/Room 5

Modifications  
Proposed Year Group: 6  
Proposed Form: Room 7  
Update Line(s)

Name	Proposed Year/Form
Brown, Steven	6/Room 7
Content, Damien	6/Room 7
Delamare, Graeme	6/Room 7
Desilva, Haley	6/Room 7
Edwardo, Jacob	6/Room 7
Edwards, Justin	6/Room 7
Elliott, Katherine	6/Room 7
Farmer, Kristy	6/Room 7
Farnon, Steven	6/Room 7
Gray, Tenille	6/Room 7
Havlent, Tom	6/Room 7
Hushler, Elizabeth	6/Room 7

Select All Invert Selection Save Modifications Close

## The Year 6s from Room 6 will go into forms 07.1 and 07.2

- Place Rueben Baker down to Mark Mills into 07.1

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 6/Room 6

Modifications  
Proposed Year Group: 7  
Proposed Form: 07.1  
Update Line(s)

Name	Proposed Year/Form
Baker, Reuben	7/07.1
Barbour, Ross	7/07.1
Born, Tanya	7/07.1
Chum, Nora	7/07.1
Ellard, Kate	7/07.1
Jones, Keith	7/07.1
Loxton, Katherine	7/07.1
Luck, Martin	7/07.1
Mills, Mark	7/07.1
Murphy, Tamara	Not specified/Not specifie
Richards, Mason	Not specified/Not specifie
Tep, Josh	Not specified/Not specifie

Select All Invert Selection Save Modifications Close

- Click **Invert Selection** and place the rest of the students in **07.2**

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 6/Room 6

Modifications  
Proposed Year Group: 7  
Proposed Form: 07.2

Name	Proposed Year/Form
Baker, Reuben	7/07.1
Barbour, Ross	7/07.1
Born, Tanya	7/07.1
Chum, Nora	7/07.1
Ellard, Kate	7/07.1
Jones, Keith	7/07.1
Loxton, Katherine	7/07.1
Luck, Martin	7/07.1
Mills, Mark	7/07.1
Murphy, Tamara	7/07.2
Richards, Mason	7/07.2
Tep, Josh	7/07.2

**All of the Year 7/07.1 students will go into Form 8.2**

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 7/07.1

Modifications  
Proposed Year Group: 8  
Proposed Form: 08.2

Name	Proposed Year/Form
Hardley, Todd James	8/08.2
James, Kendell	8/08.2
Koehler, Bronson	8/08.2
Lesley, Codie	8/08.2
Nichols, Tanya	8/08.2
Oliver, Nancy	8/08.2
Richardson, Ben	8/08.2
Sintar, Ellen	8/08.2
Smith, Thy	8/08.2
Taylor, Cass	8/08.2
Ward, Guy	8/08.2
Ward, Simon	8/08.2



**All of the Year 7/07.2 students will go into Form 8.3**

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 7/07.2

Modifications  
Proposed Year Group: 8  
Proposed Form: 08.3  
Update Line(s)

Name	Proposed Year/Form
Paterson, Erin	8/08.3
Pendlebury, Stacey	8/08.3
Peters, Darryl	8/08.3
Phelps, Ryan	8/08.3
Rafferty, Eleanor	8/08.3
Robson, Zoe	8/08.3
Sampson, Nora	8/08.3
Scanty, Janelle	8/08.3
Sintar, Karl	8/08.3
Sullivan, Hannah	8/08.3
Wansbrough, Brandon	8/08.3
Ziller, Susan	8/08.3

Select All Invert Selection Save Modifications Close

**All of Year 12 Form 12.1 will be set to Leaver as the Year Group and Form Not Specified**

**End of Year Individual Assignment**

Year/Form Select  
Current Year/Form: 12/12.1

Modifications  
Proposed Year Group: Leaver  
Proposed Form: Not specified  
Update Line(s)

Name	Proposed Year/Form
Angus, Sally	Leaver/None
Brown, Patrick	Leaver/None
Cooper, Hayden	Leaver/None
English, Dion	Leaver/None
Gray, Verity	Leaver/None
Julian, Tristan	Leaver/None
Knight, Paul	Leaver/None
Leston, Ryan	Leaver/None
Lynn, Ashlyn	Leaver/None
Martin, Kristian	Leaver/None
Mentoring, Jess	Leaver/None
Moraru, Phillip	Leaver/None

Select All Invert Selection Save Modifications Close

- **Close** the window

## 17.11 Reports Showing Proposed Year/Form

### Admin > Year End > Reports Showing Proposed Year/Form

These reports allow users to check the Proposed Years and Forms prior to processing Year End. The Year End process will not proceed until all students have a Proposed Year and Form and the Leave Date and Destination have been set for school leavers.

- **Form Lists of Proposed Year/Form Groups** will generate form lists for the new school year. These will be complete, apart from the Admissions Roll students. Do not use proposed Year and Proposed Form for students on the Admissions roll. Students on the Admissions Roll can also be included in reports by checking the **Include Admissions Roll** box. Admissions students are identified on such reports with an asterisk.
- It is recommended that you print a list of students without a Proposed Year or Form or without a Leave Date and Destination. This report is useful for checking that all students have been allocated a Proposed Year and Form and a Leave Date and Destination where appropriate. The report lists students who have no Proposed Year and/or Form. If any have been missed, make the necessary changes before the End of Year is processed.

**Note: Students on the Admissions Roll can be allocated their Year and Form once the Acceptance box is checked. They can then be transferred to the Current Roll once they arrive at school.**

### Activity

#### Admin > Year End > Reports Showing Proposed Year/Form

End of Year Reports

End of Year Reports

- ☐ Current Form lists showing proposed changes to each student.
- ☐ Form lists of proposed Year/Form groups.
- ☐ List of students by surname showing proposed Year/Form groups.
- ☒ List of students without a proposed Year or Form, or without a Leave Date or Destination.
- ☐ List of Students by Proposed/Current Form and Year.

☐ Include Indigenous Status on Report

Student Selection

Year Group: All

Form: All

☐ Include Admissions Roll

Sorting

- ☒ Sort students by name.
- ☐ Sort and total students by Gender.
- ☐ Sort and total students by Indigenous Status.

Print Cancel

- **Print** to the screen each of the five options in turn

**Note: If students are identified without a Proposed Year or Form or without a Leave Date or Destination, this will need to be rectified before proceeding.**

## 17.12 Print Student Lists for Reference (Optional)

You may wish to print year and form lists for the current year before finally running Year End for future reference. For example, navigate to **Admin > Reports > Roll Reports > Current Roll** and **Admin > Reports > Roll Reports > Year List Reports**.

**Note: The system does not retain previous years Form/Year data for students once End of Year has been processed.**

## 17.13 Process a Backup

Process a backup of the data file. This step assumes that users have been provided with the SIS Backup Wizard for copying the current year's datafiles. If you do not have this application please contact Customer Service Centre (contact details below) before proceeding with the Year End process.

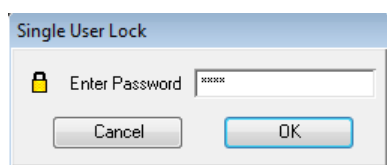
## 17.14 Process Year End

This will move students to their new Year and Form groups and move the students who have been flagged as **Leavers** to the Former Roll. Each school decides whether to process End of Year after the end of the academic year or immediately before commencement of the new academic year.

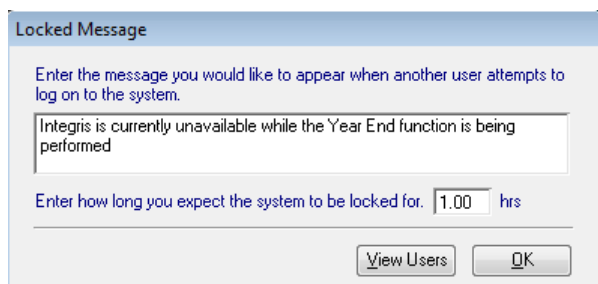
Processing Year End should only occur when you are ready to roll over your student data. This process can only be carried out in Single User Mode, that is, all users except the person performing the Year End process must be logged out of Integris.

### Activity

#### File > Single User Lock



- Type your password and click **OK**



- Click **OK** again

The Single User Lock is now activated.



## Admin > Year End > Process End of Year

- Click **OK**

**Process End of Year**

**Please Note**  
This process will update all student records, moving them to the Proposed Year and Proposed Form specified in the preceding Year End functions.

Any students in the top Year Group will automatically be moved to the Former Roll.

**PLEASE ENSURE YOU HAVE TAKEN A BACKUP OF YOUR DATA BEFORE PROCEEDING WITH THE YEAR END.**

**Recalculation of Attendance Figures**  
As part of the Year End process, current attendance figures will be updated from your attendance module.

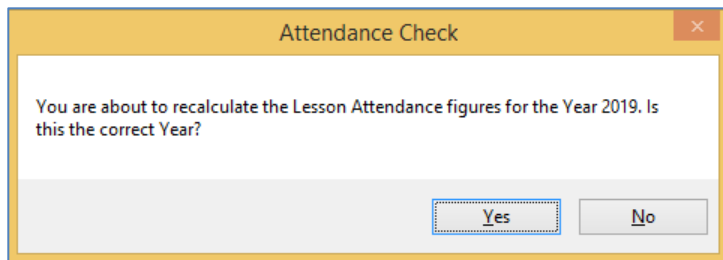
Year End will update attendance figures for those students whose attendance was last recalculated prior to:

Date: 20 DEC 2019 Time: 14:41  
Attendance Year: 2019

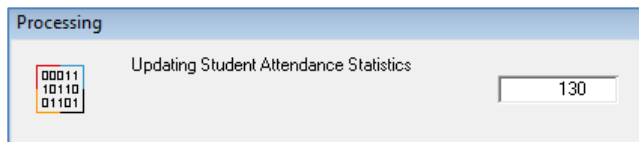
OK Cancel

- Select the correct **Attendance Year**
- Click **OK**

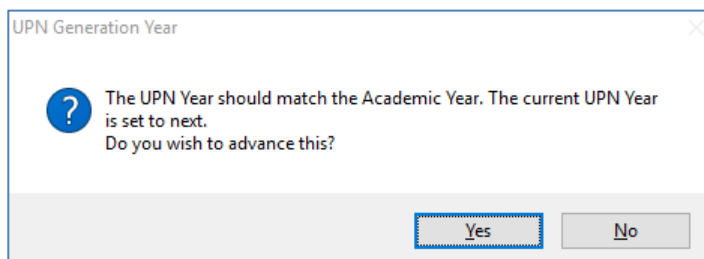
**Note: The processing of Year End may take some time (for example, processing may take from 10 to 45 minutes depending on factors such as processor capacity, student numbers and also whether the Lesson Attendance module is being used).**



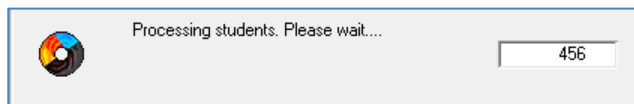
- Click **Yes**



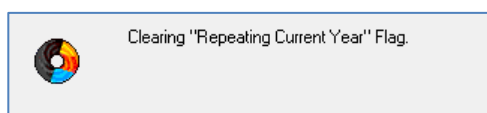
The UPN academic year is also incremented.



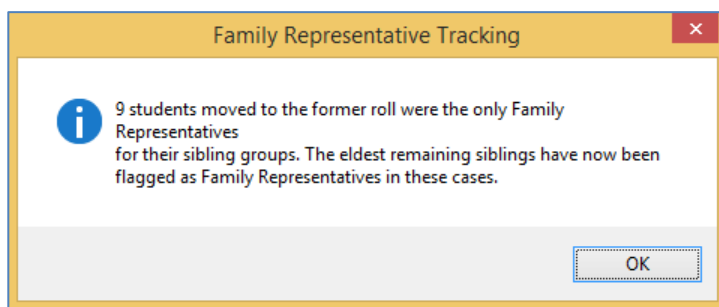
- Click **Yes**



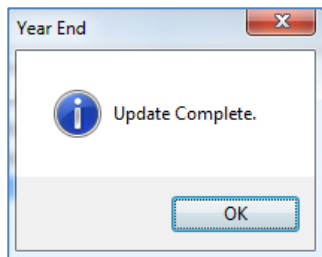
Student records are updated.



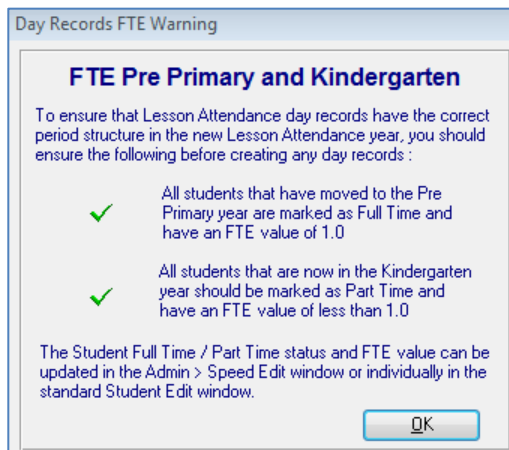
Family Representatives are updated.



- Click **OK**.



- Click **OK**.



- Click **OK**.

## 17.15 Check Year End was Successful

### Activity

#### General > Student Details

- Check that **Jackie Albert** is now in **Year 5/ Form Room 5**
- Check that **Adam Alkitik** is now in **Year 10/ Form 10.1**

**Note: If Year End has not processed correctly in your school, contact Customer Service Centre.**

## 17.16 Process Admissions Students

Admitting incoming students may be done at any time, but accepting them to the Current Roll should be undertaken **after** processing Year End. Most schools do not admit Admissions students to the Current Roll until the student/s have physically arrived at the school ready to commence classes. Until the student arrives at the school, they should remain on the Admissions roll.

If you are using the School-to-School Import function to import data for students from another Integris school, place the incoming students on the Admissions Roll prior to the following steps.


**Note: If Admissions records are being edited at the time of transfer to the Current Roll, the record/s in use by other users will not be brought on to the Current Roll. A message will appear to notify the user of the number of records not transferred to the Current Roll.**

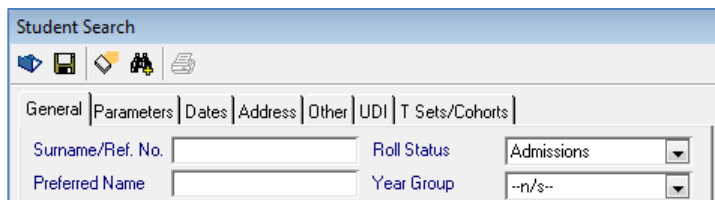
**This is not a single user mode function. However, it is advisable to use single user lock when performing the transfer of Admissions students to the Current Roll.**

## Activity

All students on the Admissions Roll have been accepted for 2020

### Admin > Speed Edit

- Choose the **Area: Acceptance Status (Admissions)**
- Find  students on the **Admission** roll



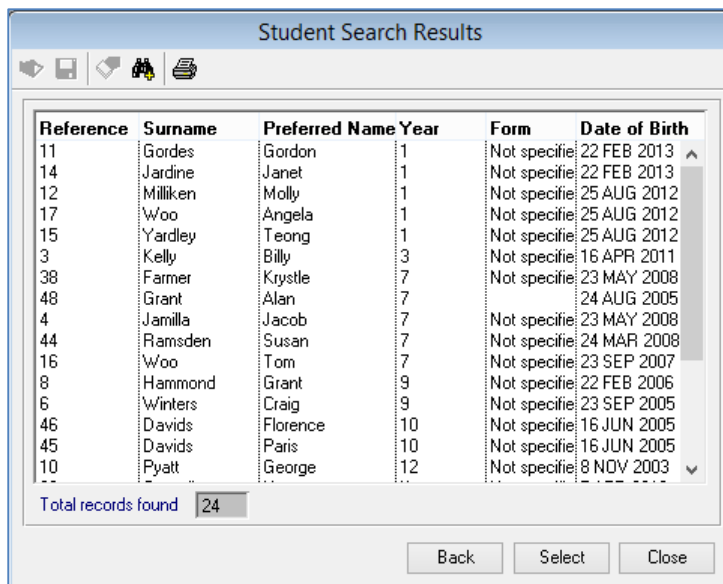
Student Search

General Parameters Dates Address Other UDI T Sets/Cohorts

Surname/Ref. No.  Roll Status

Preferred Name  Year Group

- Click **Find**
- Click on the **Year** column header to sort the students by Year



Student Search Results

Reference	Surname	Preferred Name	Year	Form	Date of Birth
11	Gordes	Gordon	1	Not specific	22 FEB 2013
14	Jardine	Janet	1	Not specific	22 FEB 2013
12	Milliken	Molly	1	Not specific	25 AUG 2012
17	Woo	Angela	1	Not specific	25 AUG 2012
15	Yardley	Teong	1	Not specific	25 AUG 2012
3	Kelly	Billy	3	Not specific	16 APR 2011
38	Farmer	Krystle	7	Not specific	23 MAY 2008
48	Grant	Alan	7	Not specific	24 AUG 2005
4	Jamilla	Jacob	7	Not specific	23 MAY 2008
44	Ramsden	Susan	7	Not specific	24 MAR 2008
16	Woo	Tom	7	Not specific	23 SEP 2007
8	Hammond	Grant	9	Not specific	22 FEB 2006
6	Winters	Craig	9	Not specific	23 SEP 2005
46	Dauids	Florence	10	Not specific	16 JUN 2005
45	Dauids	Paris	10	Not specific	16 JUN 2005
10	Pyatt	George	12	Not specific	8 NOV 2003

Total records found 24

Back Select Close

- Click **Select** and **Yes**



- Click **Select All**

Speed Edit

Area  
Acceptance Status (Admissions) ▼

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
1	Ballarat, Wendy	NO	
11	Gordes, Gordon	NO	
14	Jardine, Janet	NO	
12	Milliken, Molly	NO	
17	Woo, Angela	NO	
15	Yardley, Teong	NO	
3	Kelly, Billy	NO	
26	Angus, Hamish		
34	Baverstock, Adrian		
38	Farmer, Krystle		
47	Grant, Alan		
4	Jamilla, Jacob	NO	
44	Ramsden, Susan		
16	Woo, Tom	NO	
37	Antonello, Valentine		
8	Hammond, Grant	NO	
6	Winters, Craig	NO	
46	Dauids, Florence		
45	Dauids, Paris		
10	Pyatt, George		

New Value ☒ ☒ Close Save

- Check the **New Value** box ☒
- Click **Apply Changes** ☒

Speed Edit

Area  
Acceptance Status (Admissions) ▼

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
47	Grant, Alan	YES	M
4	Jamilla, Jacob	YES	M
44	Ramsden, Susan	YES	M
16	Woo, Tom	YES	M
37	Antonello, Valentine	YES	M
8	Hammond, Grant	YES	M
6	Winters, Craig	YES	M
46	Dauids, Florence	YES	M
45	Dauids, Paris	YES	M
10	Pyatt, George	YES	M
25	Borsche, Caitlin	YES	M
23	Carmelina, Harry	YES	M
18	Dowling, Blake	YES	M
22	Freeborn, Jackson	YES	M
9	Gordes, Marcus	YES	M
24	Kabulla, Izan	YES	M
21	Lamont, Isabelle	YES	M
20	Newbery, Naomi	YES	M
19	Wilson, Skye	YES	M

New Value ☐ ☒ Close Save

- Click **Save and Yes**

## Allocate Admissions Students to Forms

### Admin > Speed Edit

- Select the **Area: Current Form**
- Highlight from **Wendy Ballarat down to Teong Yardley**

**Speed Edit**

Area  
Current Form

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
1	Ballarat, Wendy	Room 1	M
11	Gordes, Gordon	Room 1	M
14	Jardine, Janet	Room 1	M
12	Milliken, Molly	Room 1	M
17	Woo, Angela	Room 1	M
15	Yardley, Teong	Room 1	M
3	Kelly, Billy	Not specified	
48	Grant, Alan	Not specified	
30	Alkitik, Maria	Not specified	
35	Amber, Kylie	Not specified	
28	Andrews, Guy	Not specified	
26	Angus, Hamish	Not specified	
39	Arrowsmith, William	Not specified	
41	Avery, Roslyn	Not specified	
33	Bandy, Brandy	Not specified	
34	Baverstock, Adrian	Not specified	
27	Black, Mary	Not specified	
31	Brown, Roberta	Not specified	
32	Cooper, Marianne	Not specified	
33	Farmer, Krystle	Not specified	

New Value Room 1 ☒ Close Save

- Select **New Value: Room 1**
- Click Apply Changes ☒
- Repeat to assign the remaining students to Forms as per the screen shots below


15	Yardley, Teong	Room 1	M
3	Kelly, Billy	Room 3	M
26	Angus, Hamish	08.4	M
34	Baverstock, Adrian	08.4	M
38	Farmer, Krystle	08.4	M
48	Grant, Alan	08.4	M
4	Jamilla, Jacob	08.4	M
44	Ramsden, Susan	08.4	M
16	Woo, Tom	08.4	M
37	Antonello, Valentine	09.4	M
8	Hammond, Grant	09.4	M
6	Winters, Craig	09.4	M
46	Davids, Florence	10.1	M
45	Davids, Paris	10.1	M
10	Pyatt, George	12.1	M

10	Pyatt, George	12.1	M
25	Borsche, Caitlin	K/P	M
23	Carmelina, Harry	K/P	M
18	Dowling, Blake	K/P	M
22	Freeborn, Jackson	K/P	M
9	Gordes, Marcus	K/P	M
24	Kabulla, Izan	K/P	M
21	Lamont, Isabelle	K/P	M
20	Newbery, Naomi	K/P	M
19	Wilson, Skye	K/P	M

New Value:  ☒

- Click **Save and Yes**,

**Speed Edit**

 This change of Form will be reflected in Lesson Attendance the next time records are created for the selected students.

- Click **OK** and **Close**

## Move Admissions Students to the Current Roll

### Admin > Utilities > Admissions Transfer → Current Roll

**Admissions Transfer to Current Roll**

This wizard will guide you through the process of transferring Admissions Roll students onto the Current Roll of your school.

Only those Admissions Roll students who have their 'Accepted?' checkbox ticked will be moved onto the Current Roll. This can be set either by editing the student within the Student Details area, or by selecting 'Acceptance Status (Admissions)' within Speed Edit.

Choose below how you would like to select the students to be transferred to the Current Roll.

☐ Transfer students with Acceptance Status of Yes, and Entry Date of

☒ Transfer all students with Acceptance Status of Yes, ignoring any Entry Dates that have been entered.  
Set the following Entry Date for all students who are transferred

Next student number will be 901

- Select the second option
- Enter the **Entry Date for the beginning of Next Year**
- Click **Next**

**Admissions Transfer to Current Roll**

The following students will be transferred to the Current Roll.


If any students are listed below who you do not want to transfer to the Current Roll, select them within the list and click on the **X** button.

Ref.	Name	DOB	Gender	UPN	Entry Date	Transfer?
26	Hamish Angus	23 SEP 2007	Male		27 JAN 2020	✓
37	Valentine Antonello	27 JAN 2007	Female		27 JAN 2020	✓
1	Wendy Ballarat	22 FEB 2013	Female		27 JAN 2020	✓
34	Adrian Bayerstock	24 MAR 2008	Male		27 JAN 2020	✓
25	Caitlin Borsche	7 APR 2016	Female		27 JAN 2020	✓
23	Harry Carmelina	7 APR 2016	Male		27 JAN 2020	✓
46	Florence Davids	16 JUN 2005	Female		27 JAN 2020	✓
45	Paris Davids	16 JUN 2005	Female		27 JAN 2020	✓
18	Blake Dowling	20 SEP 2015	Male		27 JAN 2020	✓
38	Krystle Farmer	23 MAY 2008	Male		27 JAN 2020	✓
22	Jackson Freeborn	7 APR 2016	Male		27 JAN 2020	✓
11	Gordon Gordes	22 FEB 2013	Male		27 JAN 2020	✓
9	Marcus Gordes	25 MAR 2015	Female		27 JAN 2020	✓
48	Alan Grant	24 AUG 2005	Male	A000409807001	4 FEB 2019	✓
8	Grant Hammond	22 FEB 2006	Male		27 JAN 2020	✓

Next student number will be 901

- Click **Finish** and **OK**
- When prompted to check for empty batches, click **Yes**
- Delete any empty batches
- Close Administration Utilities

### Restore Multi-user

- Click Single User Mode 
- Choose **Restore Multi-user**
- Enter your password and click **OK**

## 17.17 Moving External Roll Students to the Former Roll

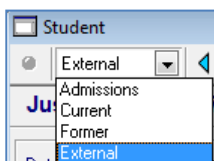
All students on the External Roll who are not returning to the school in 2016, should be moved to the Former Roll using the utility **Admin > Utilities > External Roll to Former Roll**


Edit existing External Roll Students and add a Leave Date.

### Activity

#### General > Student Details

- Select the External Roll



- Find Justin Badely
- Click the *Edit* 
- Click on the Additional tab

**Student**

Personal | Family Group | Additional | Movement Hist. | Groups | UDI | Misc. | Attendance Hist. | Medical | Activities

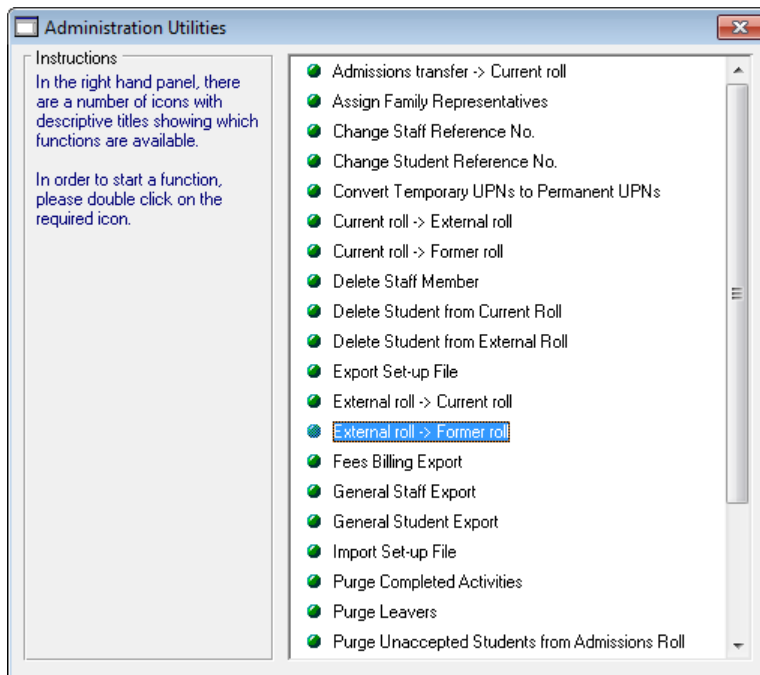
Nationality: Not specified  
Religion: Not specified  
First Language: Not specified  
Indigenous Status: Not specified  
Study Type: Not specified  
Main Lang OTE SAH: Not specified  
Mainly speak English at home?: ☐  
LBOTE: ☐  
Out of State: ☐  
Out of Area: ☐  
Access Restriction: ☐  
Entered in SLP Program: ☐  
Educational Support Program: ☐  
EAL/D Stage: ☐  
Documented Plan Completed: ☐  
In Care of DCP: ☐  
Risk Management Plan: ☐  
Australian Citizen / Permanent Resident: ☒  
In Receipt of Allowance: ☐  
Allowance Type: Not specified  
Visa Sub Class No.:  
Visa Grant No.:  
Int. Fee Paying:  
Visa SC No. Expiry Date:  
Birth Certificate Seen: ☐  
Date Checked:  
Country of Birth: Australia  
Passport Sighted: ☐  
Passport Number:  
Entry Date: 17 DEC 2019  
Prev. School:  
Destination:  
Records Sent:  
Attendance: Current (Single registr...  
Terms in this school: 0  
Boarder: ☐  
Terms in other school(s): 0  
Excluded: ☐  
FTE: 0.20  
Part Time Status: ☐ am ☐ pm ☒ n/a ☐ Custom  
Documented Plan Review Date:  
Documented Plan forwarded to DCP:

OK Cancel

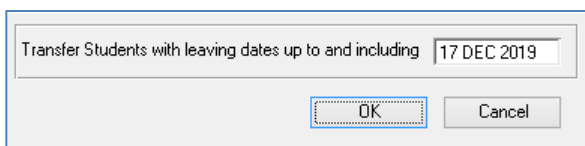
- Add a **Leave Date**
- Click **OK**

## Run the External Roll to Former Roll Utility

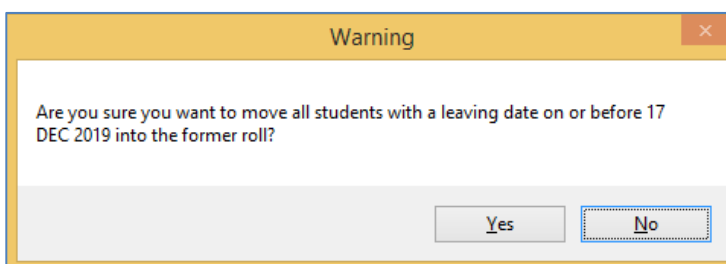
### Admin > Utilities > External Roll to Former Roll



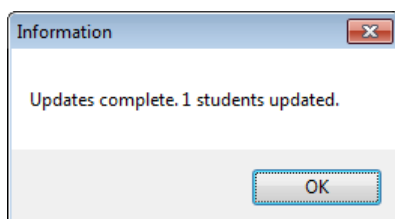
- Double Click on the Utility
- Enter the Leave Date and Click **OK**



- Click **Yes** to the Warning message



- Click **Yes** if prompted to remove students from their groups
- Click **OK** to the Updates Complete message



## View the Student on the Former Roll

### General > Student Details

**Student**

Former [v] [Navigation Icons]

**Justin Badely ( 897 )** **Year 7 Form Not specified**

Date of Birth: 24 MAR 2008  
Age: 11 Yrs 10 Mths  
Gender: Male  
Teacher(s):  
Room:  
USI:  
UPN:  
Student No.: 00000000  
Central ID: 19123456700001174

Address: 125 Watershed Road, FORRESTFIELD, WA, 6587

Original Roll External Car Registration  
E Mail Address

Contacts

Name	Phone	Address	Relation	Res	Par	Mail	Emrg	Notes	Fee
Mr Travis Badely	9658 2154	125 Watershed Road, FORRESTFIELD,	Father	Yes	Yes	Yes	0	No	Y

Res - Student Resident Par - Parental Responsibility Mail - Family Mail Marker Emrg - Emergency

Search [ ] [ ] [ ]


## 17.18 Changing Student's FTE

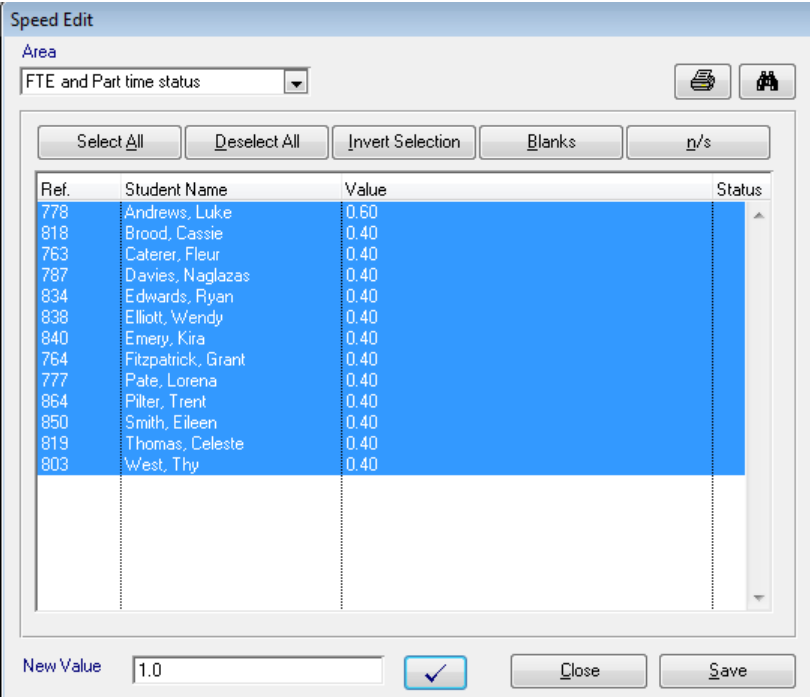
Some students will need to have their FTE altered to reflect their correct attendance at school. This will affect both Lesson Attendance and the Census.

### Activity

#### Admin > Speed Edit

##### Increasing the FTE

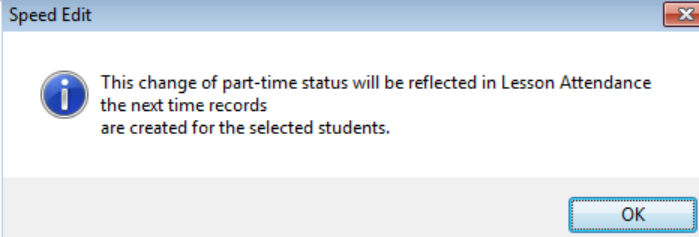
- Select the **Area: FTE and Part-time status**
- Find  the students in **Year P**
- Click **Select All**
- Enter a **New Value** of **1.0**



The Speed Edit dialog box is shown with the 'Area' dropdown set to 'FTE and Part time status'. The 'Select All' button is highlighted. Below the table, the 'New Value' field is set to '1.0'.

Ref.	Student Name	Value	Status
778	Andrews, Luke	0.60	
818	Brood, Cassie	0.40	
763	Caterer, Fleur	0.40	
787	Davies, Naglazas	0.40	
834	Edwards, Ryan	0.40	
838	Elliott, Wendy	0.40	
840	Emery, Kira	0.40	
764	Fitzpatrick, Grant	0.40	
777	Pate, Lorena	0.40	
864	Pitter, Trent	0.40	
850	Smith, Eileen	0.40	
819	Thomas, Celeste	0.40	
803	West, Thy	0.40	

- Click Apply Changes 
- Click **Save**




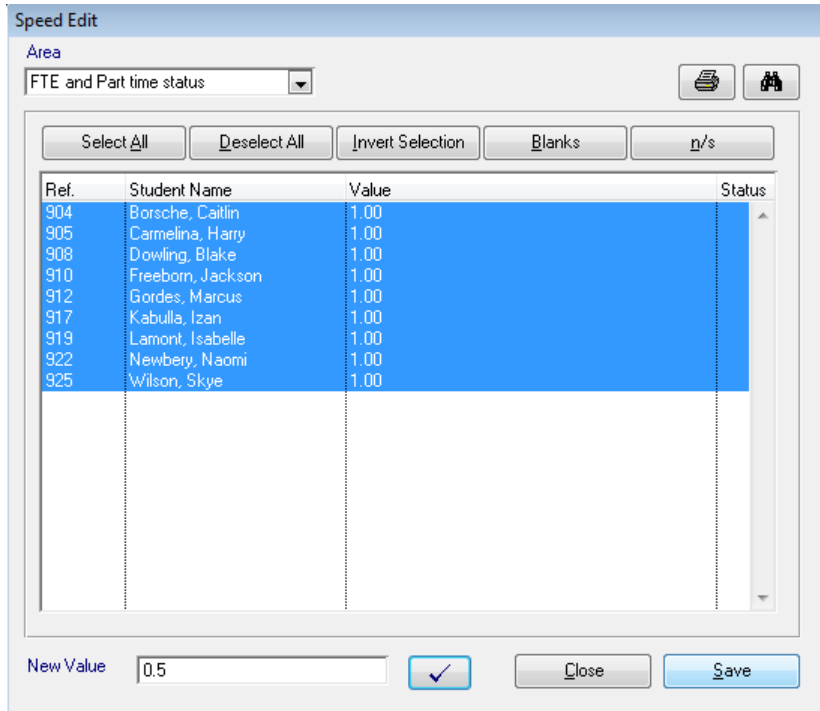
The Speed Edit dialog box displays a message: "This change of part-time status will be reflected in Lesson Attendance the next time records are created for the selected students." with an 'OK' button.

- Click **OK** and **Yes**



## Decreasing the FTE


- Find  the students in **Year Group K**
- Click **Select All**
- Enter a **New Value** of **0.5**

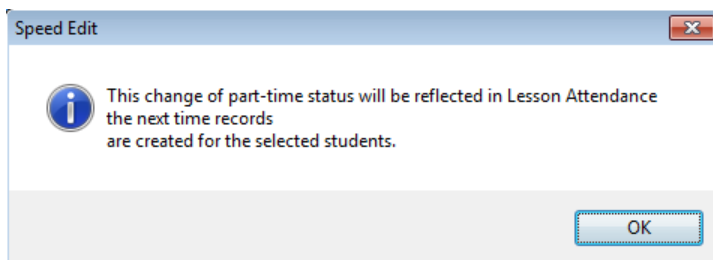


The Speed Edit dialog box is shown with the 'Area' dropdown set to 'FTE and Part time status'. The 'Select All' button is highlighted. Below the buttons is a table with the following data:

Ref.	Student Name	Value	Status
904	Borsche, Caitlin	1.00	
905	Carmelina, Harry	1.00	
908	Dowling, Blake	1.00	
910	Freeborn, Jackson	1.00	
912	Gordes, Marcus	1.00	
917	Kabulla, Izan	1.00	
919	Lamont, Isabelle	1.00	
922	Newbery, Naomi	1.00	
925	Wilson, Skye	1.00	

At the bottom, the 'New Value' field is set to '0.5'. The 'Apply' button (with a checkmark icon) is highlighted, and the 'Save' button is also visible.

- Click Apply Changes 
- Click **Save**



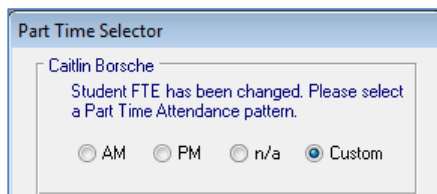
The Speed Edit dialog box is shown with a message icon and the following text:

This change of part-time status will be reflected in Lesson Attendance the next time records are created for the selected students.

An 'OK' button is located at the bottom right of the dialog box.

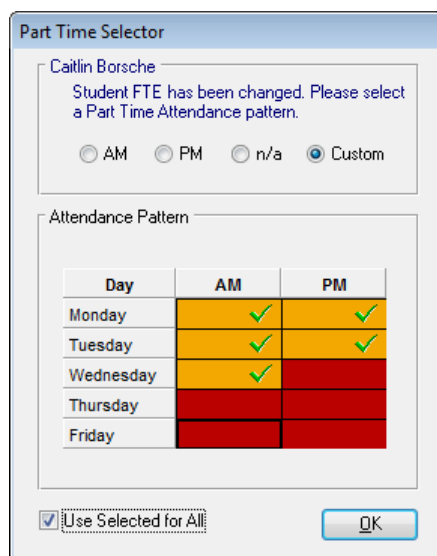
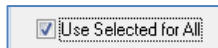
When a student's FTE is set to less than 1.0, a **Part Time Selector** window will be displayed.

- Select the **Custom** radio button



- Deselect all of the Thursday and Friday sessions and the Wednesday **PM** session

- Check **Use Selected for All**



Day	AM	PM
Monday	✓	✓
Tuesday	✓	✓
Wednesday	✓	
Thursday		
Friday		

- Click **OK** and **Close**

**Notes:** For further information on preparing Lesson Attendance for the New Year, please refer to the Lesson Attendance Manual or the Administration Manager End of Year Factsheet.

For Information on setting up Kindergarten students on a 10-Day Attendance Cycle, refer to the documentation on the DoE STIMS website (Under Lesson Attendance) at the link below.

<http://det.wa.edu.au/intranet/stims/detcms/intranet/student-information-management-system/sis-administration/lesson-attendance-module/fact-sheets>

## 17.19 Add New Staff

If new staff members are starting at the school, their details can be added through **General > Staff Details**. This can be done at any time, but is included on this checklist as a reminder

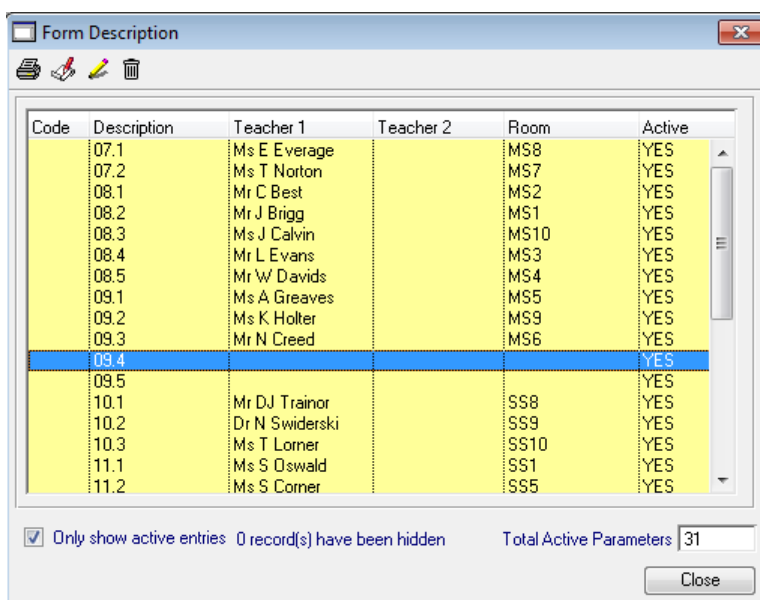
## 17.20 Update Form Descriptions

Once staff members have been added in Staff Details, they can be assigned Forms and Rooms

### Activity

#### General > Parameters > Form Description



- Select the **Form 9.4**

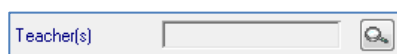



The 'Form Description' window displays a table with the following data:

Code	Description	Teacher 1	Teacher 2	Room	Active
07.1		Ms E Everage		MS8	YES
07.2		Ms T Norton		MS7	YES
08.1		Mr C Best		MS2	YES
08.2		Mr J Brigg		MS1	YES
08.3		Ms J Calvin		MS10	YES
08.4		Mr L Evans		MS3	YES
08.5		Mr W Davids		MS4	YES
09.1		Ms A Greaves		MS5	YES
09.2		Ms K Holter		MS9	YES
09.3		Mr N Creed		MS6	YES
09.4					YES
09.5					YES
10.1		Mr DJ Trainor		SS8	YES
10.2		Dr N Swiderski		SS9	YES
10.3		Ms T Lerner		SS10	YES
11.1		Ms S Oswald		SS1	YES
11.2		Ms S Corner		SS5	YES

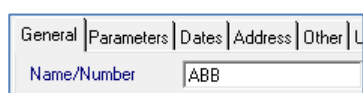
At the bottom, there is a checkbox for 'Only show active entries' (checked), a status message '0 record(s) have been hidden', and a 'Total Active Parameters' field showing '31'. A 'Close' button is also present.

- Click **Edit** 
- Click Find Form Teacher 




Teacher(s)  

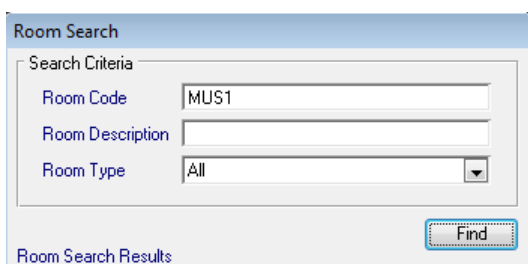
- Type **ABB** in the **Name/Number** field and click **Find**



General | Parameters | Dates | Address | Other | L

Name/Number

- Click Find Form Room 
- Type **MUS1** in the Room Code and click **Find**



Room Search

Search Criteria

Room Code

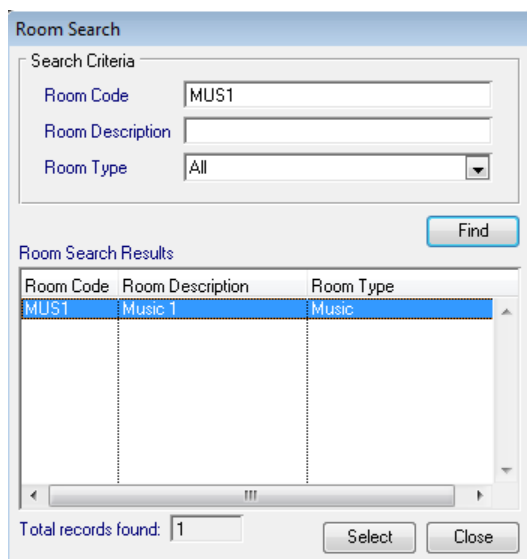
Room Description

Room Type

Find

Room Search Results

- Highlight **MUS1**



**Room Search**

Search Criteria

Room Code: MUS1

Room Description:

Room Type: All

Find

Room Search Results

Room Code	Room Description	Room Type
MUS1	Music 1	Music

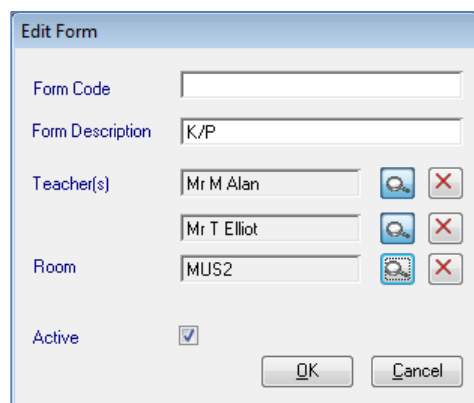
Total records found: 1

Select Close

- Click **Select**
- Click **Ok**

#### Form K/P will have a two new teachers

- Select **Form K/P** and click Edit 
- Find  **Mark Alan**
- Find **Travis Elliot**
- Find room **MUS2**







**Edit Form**



Form Code:

Form Description: K/P

Teacher(s):

Mr M Alan  

Mr T Elliot  

Room: MUS2  

Active: ☒

OK Cancel


- Click **OK**

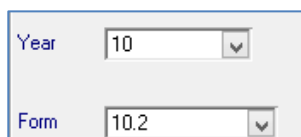
## 17.21 Repeating Students

Ensure that for any students repeating the current academic year, the **Repeating Current Year** box in the **Miscellaneous** window in **Student Details** has been checked.

### Activity


#### General > Student Details

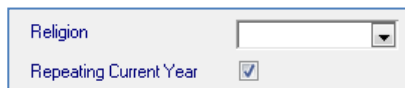
- Use Search to load **Abrey Stewart's** records
- Click Edit 
- Change his Year back to **Year 10** and **Form 10.2**



Year 10

Form 10.2

- Select Miscellaneous tab 
- Check **Repeating Current Year**



Religion

Repeating Current Year ☒

- Click **OK** and **Close**

## 17.22 Assign Family Representatives

### Admin > Utilities > Assign Family Representatives

**Family Representative** flags a student as being the one who, for example, is given newsletters on behalf of a family. The field differs from the Family Mail Marker in that the field is attached to the student, rather than to the student contacts.

One or more members of a sibling group may be flagged as Family Representatives, although it is anticipated that the marker will usually be attached to the eldest or youngest sibling enrolled at the school.

The Family Representative Field is available in the personal area of the Student window.



If a student is added to the database and he or she is to be the family representative for a sibling group, check Family Representative. This will not overwrite any sibling already flagged as family representative.

To ensure that all family groups have a family representative, go to **Admin > Utilities > Assign Family Representatives** and choose the options that suit your needs.

A screenshot of the 'Assign Family Representatives' dialog box. It contains instructions and three sections of radio button options. The first section has 'Mark Eldest Siblings as Family Representatives' selected. The second section has 'Apply ONLY to sibling groups with no Family Representatives' selected. The third section has 'Tracking ON' selected. There are 'OK' and 'Cancel' buttons at the bottom right.

**Assign Family Representatives**

This utility will set the Family Representative indicator for students.

Use the buttons below to set your preferences, then click on 'OK' to run the utility.

☒ Mark Eldest Siblings as Family Representatives  
☐ Mark Youngest Siblings as Family Representatives

☐ Apply to ALL students (will overwrite existing flags)  
☒ Apply ONLY to sibling groups with no Family Representatives (leaves existing flagged students and sibling groups unchanged)

☒ Tracking ON When ON, Tracking will re-allocate the Family Representative for sibling groups where an existing representative member of the group is moved from the Current Roll.  
☐ Tracking OFF

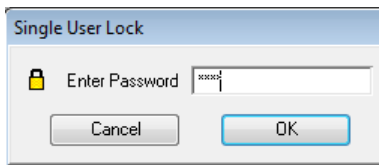
OK Cancel

Press **OK** to run the function.

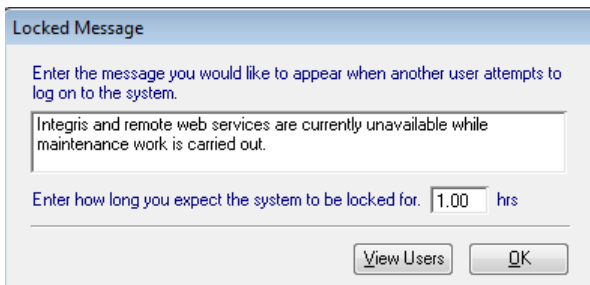
**Note: This function needs to be run in Single User mode.**

## Activity

### File > Single User Lock

A dialog box titled "Single User Lock". It contains a label "Enter Password" next to a password input field with four asterisks. Below the input field are two buttons: "Cancel" and "OK".

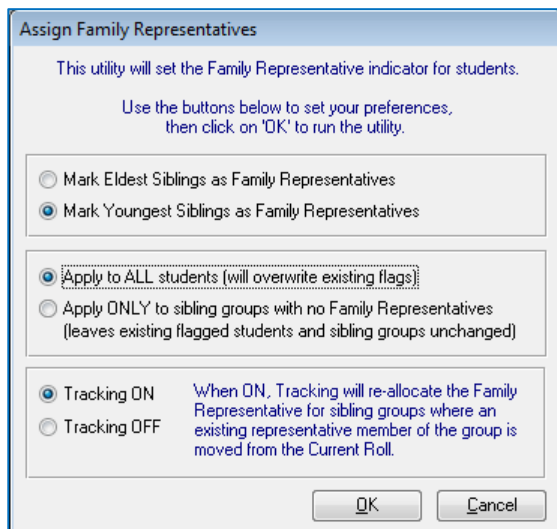
- Enter **keys** and click **OK**

A dialog box titled "Locked Message". It contains a text area with the message: "Enter the message you would like to appear when another user attempts to log on to the system." Below the text area is a text box with the message: "Integris and remote web services are currently unavailable while maintenance work is carried out." Below the text box is a label "Enter how long you expect the system to be locked for." followed by a numeric input field set to "1.00" and the unit "hrs". At the bottom are two buttons: "View Users" and "OK".

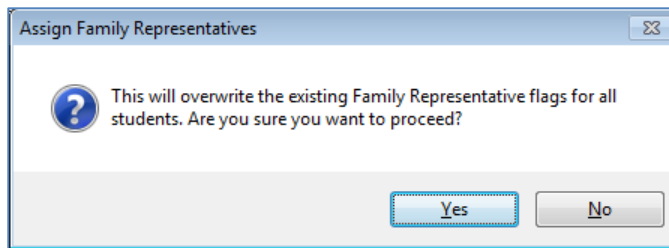
- Click **OK** again

### Admin > Utilities > Assign Family Representatives

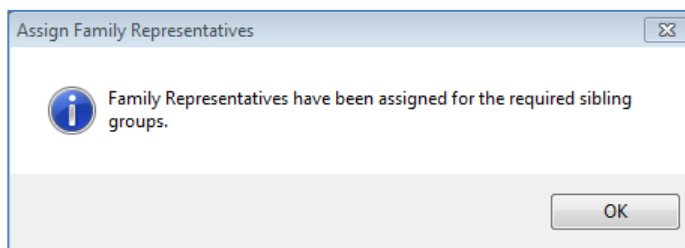
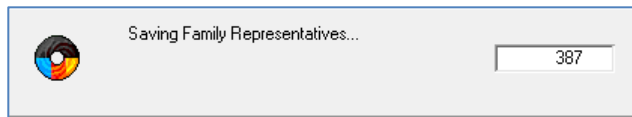
- Select **Mark Youngest Siblings as Family Representatives**
- Select **Apply to ALL Students**
- Leave **Tracking ON**

A dialog box titled "Assign Family Representatives". It contains the following text: "This utility will set the Family Representative indicator for students." and "Use the buttons below to set your preferences, then click on 'OK' to run the utility." Below this text are three groups of radio buttons. The first group has two options: "Mark Eldest Siblings as Family Representatives" and "Mark Youngest Siblings as Family Representatives". The second group has two options: "Apply to ALL students (will overwrite existing flags)" and "Apply ONLY to sibling groups with no Family Representatives (leaves existing flagged students and sibling groups unchanged)". The third group has two options: "Tracking ON" and "Tracking OFF". To the right of the "Tracking ON" option is a text box with the following text: "When ON, Tracking will re-allocate the Family Representative for sibling groups where an existing representative member of the group is moved from the Current Roll." At the bottom are two buttons: "OK" and "Cancel".

- Click **OK**



- Click **Yes**



- Click **OK**
- Close Administration Utilities

- Click the Locked in Single User Mode icon
- Click **Restore Multi-user**
- Enter **keys** and click **OK**





## 17.23 Print State Archives Report

As part of the End of Year Process, schools are required to produce the State Archives Report, which will ensure schools comply with the State Records Act 2000.

As SIS is not a Records Management compliant system and in the absence of an electronic records and document management system for schools, enrolment records for left students held within SIS are required to be produced in a hardcopy format.

The process will include:

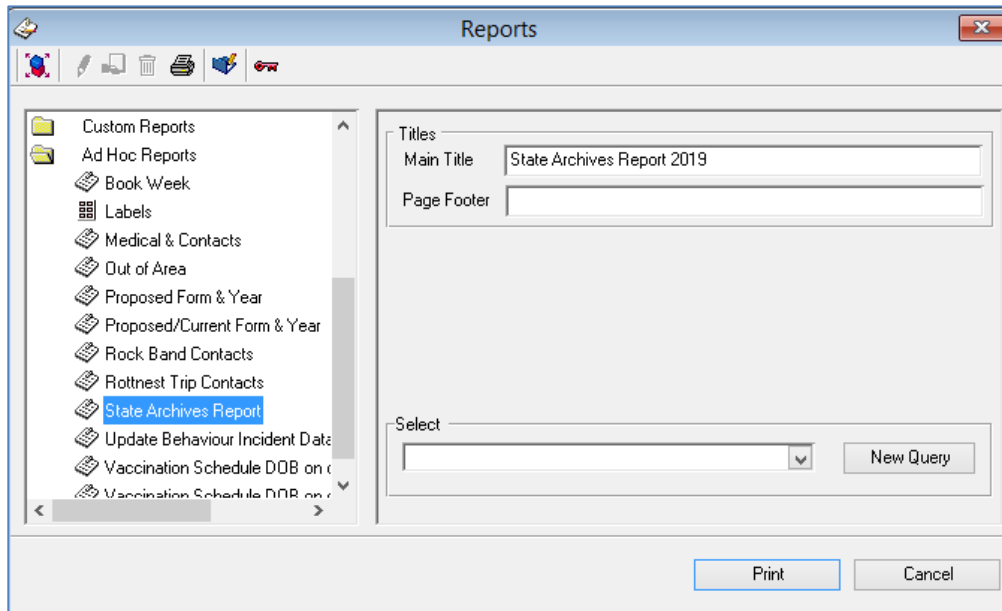
- Producing the relevant printout (this will list the various student enrolment details for left students only).
- Saving the hardcopy report in a file created in the 859 category of the School Filing System **e.g.**, 859/nn STUDENTS – ENROLMENTS – Enrolment details of students who left **[name of school]** in 2019.
- Retaining the file as an archival record and holding for one year.

At the end of one year, close the file and process it in accordance with the procedures in the Records Management Manual for School, College and Campus Records relating to the transfer of archival records to the State Records Office of Western Australia.

## Activity

### Admin > Reports > Ad Hoc Reports

- Open the **Ad Hoc Reports** folder
- Highlight **State Archives Report**
- Add the year **2019** to the Main Title



**Note:** The report will only need to show students who have left school in the current calendar year.

- Click **New Query** to find the students with the **Roll Status** of **n/s**

- Click on the **Date** tab
- Enter **Leaving Dates** for the current year

- Print** the report to the screen

**Notes:** A copy of this report needs to be saved to the 859 category of the School Filing System e.g. 859/nn STUDENTS > ENROLMENTS > Enrolment details of students who left [name of school] in 2019.

**Retain this file as an archive record and store for one year. At the end of one year, close the file and process it in accordance with the procedures in the Records Management Manual for School, College and Campus Records relating to the transfer of archival records to the State Records Office of Western Australia.**

- Close** Reports

## 17.24 Set up New Attendance Year (if using the Lesson Attendance Module)

This step applies to schools using the Lesson Attendance Module. Please refer to the Lesson Attendance Manual to set up your new attendance year.

**(Not Demonstrated in Training)**

## 17.25 Notification of Enrolment

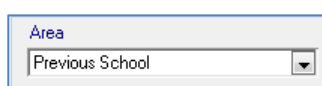
Schools are reminded that they must provide written or electronic notification of the date an enrolment commences to the school where the new student was previously enrolled. This includes Primary schools when students are enrolling in Secondary school for the first time.

### Activity:


#### Admin > Speed Edit

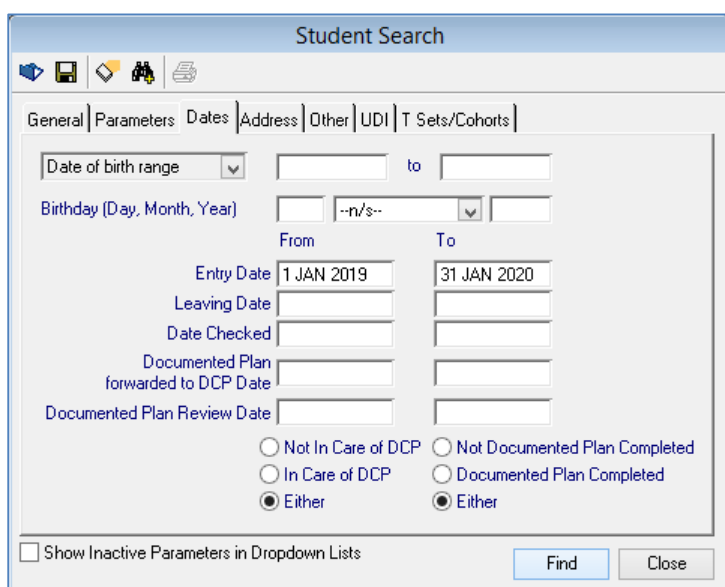
#### Confirming Enrolment to the Previous School

- Select **Previous School** from the **Area** drop-down menu



A screenshot of a web form with a dropdown menu labeled 'Area'. The dropdown is open, showing 'Previous School' as the selected option.

- Click  to find the students on the **Current** roll
- Select the **Dates** tab and enter an **Entry date** range of **1 Jan 2019** to **31 January 2020**



A screenshot of the 'Student Search' dialog box. The 'Dates' tab is selected. The 'Entry Date' range is set from '1 JAN 2019' to '31 JAN 2020'. Other fields like 'Leaving Date', 'Date Checked', 'Documented Plan forwarded to DCP Date', and 'Documented Plan Review Date' are empty. There are radio buttons for 'Not In Care of DCP', 'In Care of DCP', 'Not Documented Plan Completed', 'Documented Plan Completed', and 'Either' (selected). A checkbox 'Show Inactive Parameters in Dropdown Lists' is at the bottom left. 'Find' and 'Close' buttons are at the bottom right.

- Click on **Find**, **Select** and **Yes**

A list of students and their **Previous School** will be displayed

**Note: At school when this activity is performed as part of the year-end activities, the date range would commence from the first day of the new school year.**

- Click on the **Value** header and scroll to check the list

**Speed Edit**

Area  
Previous School

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
896	Allen, David		
778	Andrews, Luke		
818	Brood, Cassie	Pingrup P.S.	
895	Burnett, Joshua	Tapping PS	
776	Campbell, Leif	Moerlina School (Mt Claremont)	
763	Caterer, Fleur	Other Sources	
898	Crean, Madeline		
787	Davies, Naglazas	Orana Catholic School (Willetton)	
834	Edwards, Ryan		
838	Elliott, Wendy		
840	Emery, Kira		
764	Fitzpatrick, Grant		
900	Miller, Lynda	Armada P.S.	
777	Pate, Lorena		
864	Pitter, Trent		
850	Smith, Eileen		
819	Thomas, Celeste		
803	West, Thy		

New Value

Close Save

- To print the list, select the printer icon



A Transfer Note or List must be sent to each school identified as the student's last school, advising that the student is now enrolled at your school.

**Note: A Previous School will only display where this has been added in the Movement History for the students.**

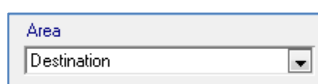
## 17.26 Checking Student's Destination School


Schools must also resolve the destination of each leaving student, including those students making the transition from Primary to High School, Middle School or Senior Campus. To assist in this process, schools can print a list of all students on the Former Roll displaying their destination school.

### Activity

#### Admin >Speed Edit

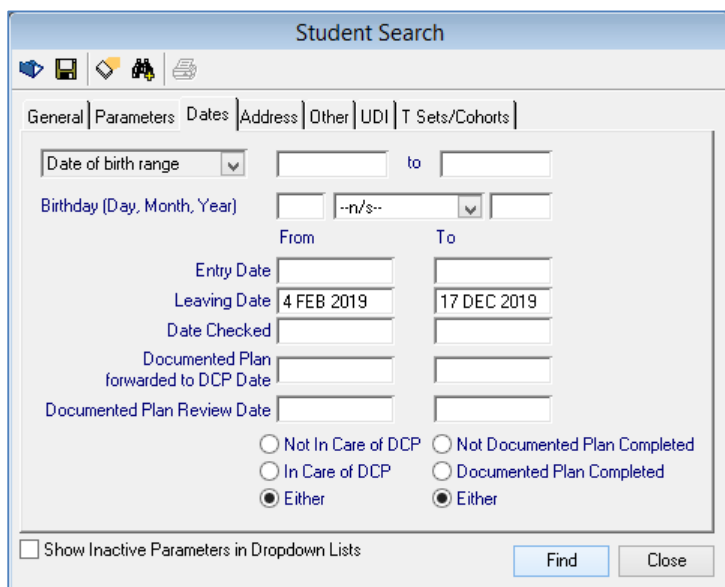
- Select **Destination** from the **Area** drop-down menu

A screenshot of a web form with a label 'Area' and a dropdown menu. The dropdown menu is open, showing 'Destination' as the selected option.

- Click  to find the students on the **Former** roll

A screenshot of a web form with a label 'Roll Status' and a dropdown menu. The dropdown menu is open, showing 'Former' as the selected option.



- Click the **Dates** tab and enter a **Leaving Date** range of **04/02/19** to **17/12/19**

A screenshot of the 'Student Search' dialog box. The 'Dates' tab is selected. The 'Leaving Date' range is set from '4 FEB 2019' to '17 DEC 2019'. The 'Either' radio button is selected under both 'Not In Care of DCP' and 'Not Documented Plan Completed' sections. The 'Find' button is highlighted.

- Click on **Find**, **Select** and **Yes**


A list of students and their destination school will be displayed

**Speed Edit**

Area  
Destination 



Ref	Student Name	Value	Status
897	Badely, Justin		
98	Istan, Kevin	Bunbury S.H.S.	
815	Smith, Cameron	Jurien D.H.S.	
350	Smith, Kane	Jurien D.H.S.	
357	So, Linda	Northampton D.H.S.	
295	Ramsay, Damien	Not specified	
290	Pryor, Cassie	Not specified	
285	Price, Charlie	Not specified	
280	Piper, Michelle	Not specified	
275	Peterson, Candice	Not specified	
270	Peroni, Adam	Not specified	
250	Otter, Lauren	Not specified	
247	Oscar, Jillian	Not specified	
245	Orringe, Nathan	Not specified	
240	Ontas, Martin	Not specified	
237	O'Donnell, Sean	Not specified	
235	O'Brien, Mike	Not specified	
230	Nixon, Tania	Not specified	
220	Murphy, Carlos	Not specified	
215	Maxwell, Tanya	Not specified	

New Value

- To print the list, select the printer icon 

Where an advice of transfer has not been received for a particular student, the school should follow up with the parent to determine the destination and confirm the enrolment with the new school. Where schools are unable to verify student destination following investigation, the child may be considered as *whereabouts unknown* and should be referred to the Student Tracking Officer through the District Attendance Coordinator.

**Note:** Further information outlining this process can be found at <http://bswb.det.wa.edu.au>

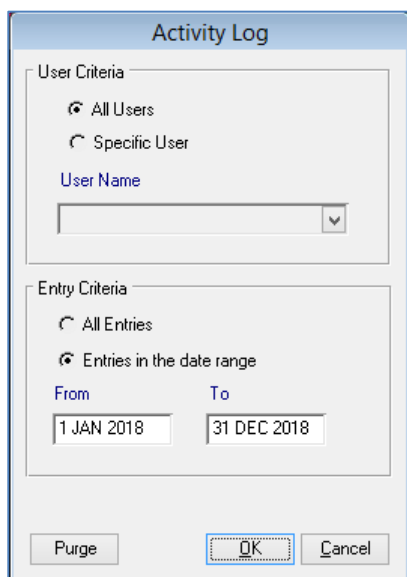
## 17.27Purge the Audit Trail

### Activity

#### General > Control > Audit

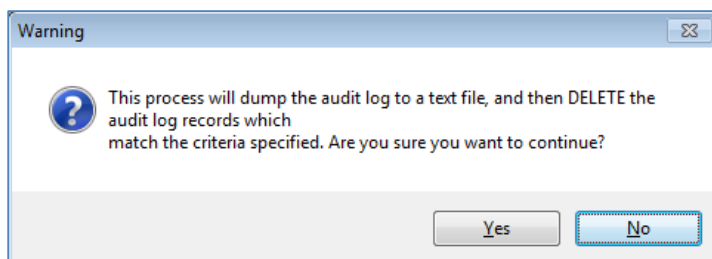
- Select **All Users** and **Entries** in the date range.
- Enter the last day of the year prior to the previous calendar year

**Note:** Schools are requested to keep the Activity Log for all entries in the previous year



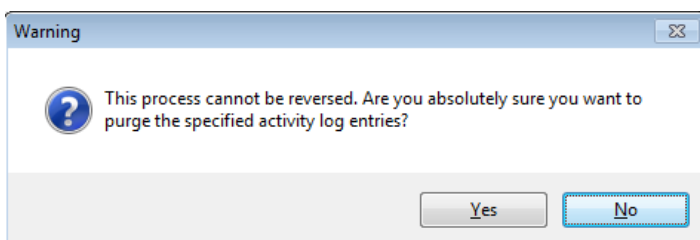
The 'Activity Log' dialog box is shown. It has two main sections: 'User Criteria' and 'Entry Criteria'. Under 'User Criteria', the 'All Users' radio button is selected, and the 'Specific User' section is collapsed. Under 'Entry Criteria', the 'Entries in the date range' radio button is selected. The 'From' date is '1 JAN 2018' and the 'To' date is '31 DEC 2018'. At the bottom, there are three buttons: 'Purge', 'OK', and 'Cancel'.

- Click **Purge**



A 'Warning' dialog box is shown. It contains a question mark icon and the text: 'This process will dump the audit log to a text file, and then DELETE the audit log records which match the criteria specified. Are you sure you want to continue?'. At the bottom, there are two buttons: 'Yes' and 'No'.

- Click **Yes**



A 'Warning' dialog box is shown. It contains a question mark icon and the text: 'This process cannot be reversed. Are you absolutely sure you want to purge the specified activity log entries?'. At the bottom, there are two buttons: 'Yes' and 'No'.

- Click **Yes**
- Save to **C:\Keys\Integris\Outbox** with the file name: **2018 Audit Log**

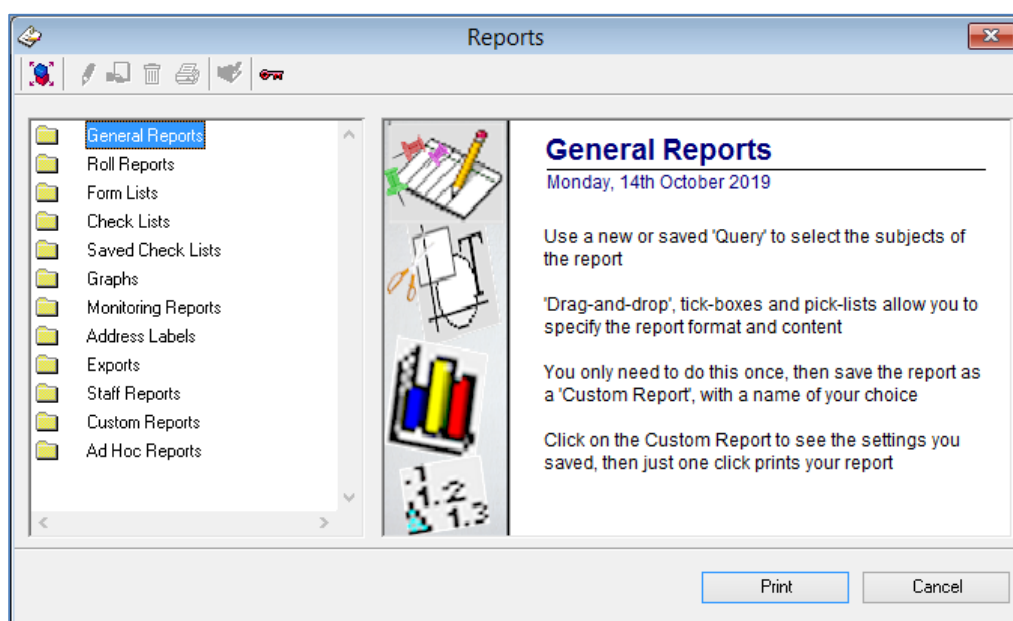


# 18 Reports

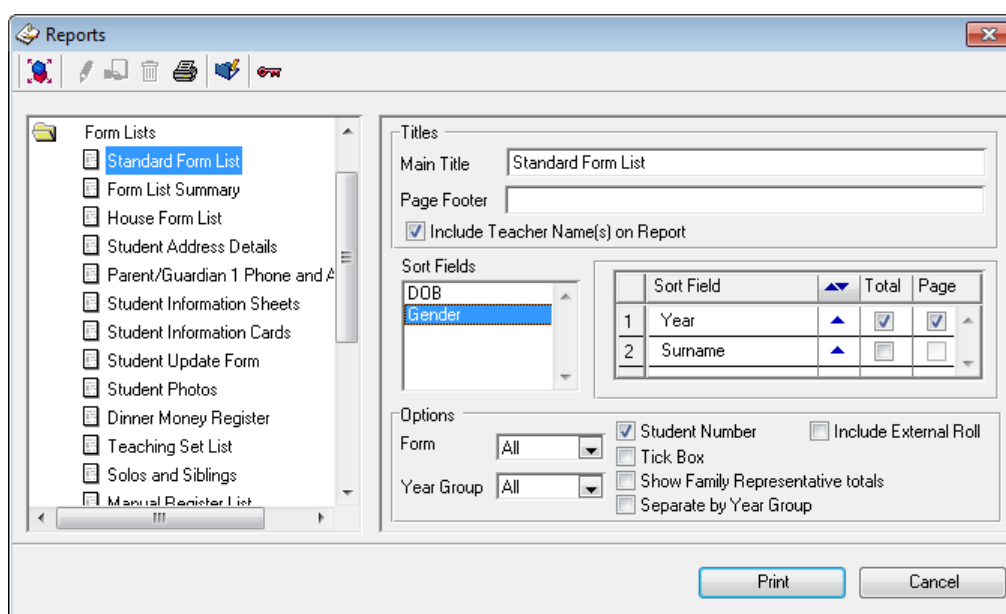
## 18.1 Standard Reports

### Admin > Reports

Each folder on the left-hand side contains a number of reports. To run a report, click on the relevant report to highlight it. Any Sort Fields and Options will be displayed on the right hand side of the window.



Example: For a **Standard Form List** report sort options available are listed under Sort Fields. To sort the report by a particular field, drag the field name from the **Sort Fields** box on the left into the **Sort Field** box on the right. Alternatively, double click on a **Sort Field** to select it. Place a tick in checkboxes to total (count) a field or to display each new value for a sort field on a new page.




When all the details have been set up, click **Print** and choose a destination for the file.

Some Reports allow the user to select students by Year and Form. Others allow the user to select students using the **New Query** button. This enables you to select students based on a previously saved query or to select a new query. Selecting **New Query** brings up the standard Student Search window.

Once the query has been defined, click **Print** and choose a destination for the file.



If you often run a standard report using the same criteria, you can save the settings for future use by clicking on the Save as a Custom Report button. This stores the report settings in the **Custom Reports** folder.

If other users need to run the report, use Allow Custom report to be used by others  so that other users can be given access rights to the report.

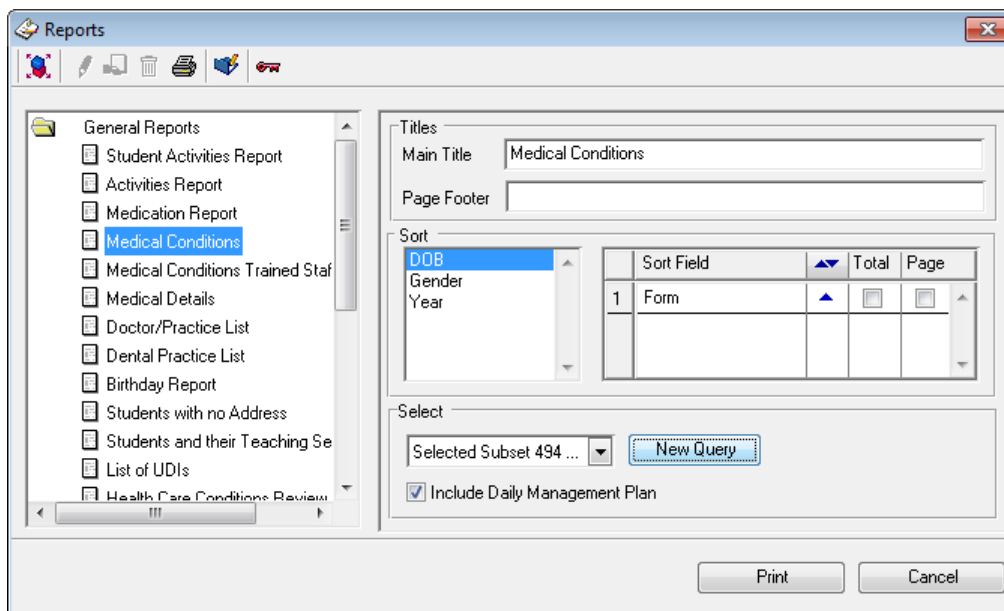
To expand the whole of the reports tree at once, click on Expand Tree. 

### 18.1.1 General Reports

#### Activity

##### Admin > Reports > General Reports > Medical Conditions

- Sort by **Form**
- Click **New Query** to find all the students in the school
- Tick to Include Daily Management Plan



The screenshot shows the 'Reports' window with the 'Medical Conditions' report selected. The 'Titles' section has 'Main Title' set to 'Medical Conditions' and 'Page Footer' is empty. The 'Sort' section shows 'DOB' selected in the list, and the table below shows 'Form' as the sort field for row 1. The 'Select' section shows 'Selected Subset 494 ...' and the 'New Query' button. The 'Include Daily Management Plan' checkbox is checked. The 'Print' and 'Cancel' buttons are at the bottom right.

	Sort Field	Total	Page
1	Form		

- Click Print

## Admin > Reports > General Reports > Birthday Report

- Click **New Query**, find the **Year 7** students
- Sort by **Day of month**
- **Print** to the screen

Reports

General Reports

- Student Activities Report
- Activities Report
- Medication Report
- Medical Conditions
- Medical Conditions Trained Staf
- Medical Details
- Doctor/Practice List
- Dental Practice List
- Birthday Report**
- Students with no Address
- Students and their Teaching Se
- List of UDIs
- Health Care Conditions Review

Titles

Main Title: Birthday Report

Page Footer:

Sort

	Sort Field	Total	Page
Form			
Gender			
Year	1 Day of month		

Select

Selected Subset 13 e... **New Query** ☐ New page for every month

☐ Display age as at

Print Cancel

## 18.1.2 Roll Reports

### Admin > Reports > Roll Reports > Current Roll with User Font Size

- Sort by Form, then Year
- Check **Total** and **Page** for **Form**
- Check **Total** for **Year**
- Use **New Query** to find all the students in the school
- Enter **Font Size 12 or 14**
- Uncheck **Show Reference Number** if required
- **Print** to the screen

Reports

Current Roll  
Current Roll with User Font Size  
Former Students  
Admissions  
New Admissions to Current Roll  
Admissions or Leavers Report  
Standard Student List  
Student Address Details  
Parent/Guardian 1 Phone and A  
Students with Temporary UPNs  
Students List Showing Current a  
Students with Siblings  
Year Lists  
Roll Count by Date

Titles  
Main Title: Current Roll with User Font Size  
Page Footer:

Sort

	Sort Field	Total	Page
1	Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Year	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select  
Selected Subset 494 ...  
New Query  
Font Size: 12  
☐ Totals only  
☒ Show Reference Number

Print Cancel

## Admin > Reports > Roll Reports > Parent/Guardian 1 Phone and Address

- Sort by **Form**
- Tick **Total** and **Page** for Form
- Select all students on the Current Roll
- Click **Print**

Reports

General Reports

Roll Reports

Current Roll

Current Roll with User Font Size

Former Students

Admissions

New Admissions to Current Roll

Admissions or Leavers Report

Standard Student List

Student Address Details

Parent/Guardian 1 Phone and Address

Students with Temporary UPNs

Students List Showing Current a

Students with Siblings

Titles

Main Title: Parent/Guardian 1 Phone and Address

Page Footer:

Sort Fields

	Sort Field	Total	Page
1	Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select:

Options:

☒ Include Student Number

☐ Include Year Group

☐ Include Form

Print Cancel

## Admin > Reports > Roll Reports > Roll Count by Date

- Type today's date
- Click **Print**
- Re-Print for Year Levels
- Check the box for Totals Only
- Click **Print**

The screenshot shows a software window titled 'Reports'. On the left is a tree view of report categories: 'New Admissions to Current Roll', 'Admissions or Leavers Report', 'Standard Student List', 'Student Address Details', 'Parent/Guardian 1 Phone and A', 'Students with Temporary UPNs', 'Students List Showing Current a', 'Students with Siblings', 'Year Lists', 'Roll Count by Date' (highlighted), 'Form Lists', 'Check Lists', 'Saved Check Lists', and 'Graphs'. The main area is divided into sections: 'Titles' with 'Main Title' set to 'Roll Count by Date' and an empty 'Page Footer' field; 'Sort' with a list of fields (Form, Year, Gender, Ethnicity) and a table with columns 'Sort Field', 'Total', and 'Page'; 'Select' with 'Year' set to 'All' and an empty 'Date' field; and 'Summarise' with 'Form' selected, 'Year' unselected, and 'Totals only' checked. At the bottom right are 'Print' and 'Cancel' buttons.

Sort Field	Total	Page

**Note:** This report is best run for the Current Year only.

### 18.1.3 Form Lists

#### Admin > Reports > Form Lists > Form List Summary

- Change the **Main Title** to **Class Numbers**
- Check **Include Teacher Name(s) on Report**
- Check **Include Family Representative totals**
- Summarise **by Year Group**
- **Print** to the screen

The screenshot shows the 'Form List Summary' configuration window. On the left, a tree view lists various report types, with 'Form List Summary' selected. The main area is divided into sections: 'Titles' with fields for 'Main Title' (containing 'Form List Summary') and 'Page Footer'; a checkbox for 'Include Teacher Name(s) on Report' which is checked; a 'Summarise' section with radio buttons for 'by Year Group' (selected) and 'by Form'; and another checkbox for 'Include Family Representative totals' which is checked. At the bottom right are 'Print' and 'Cancel' buttons.

#### Admin > Reports > Form Lists > Student Information Card

- Click **New Query**, find the **Year 6** students

The screenshot shows the 'Student Information Cards' configuration window. The left tree view has 'Student Information Cards' selected. The main area includes 'Titles' fields for 'Main Title' (containing 'Student Information Cards') and 'Page Footer'. Below this is a 'Select' section with a dropdown menu showing 'Selected Subset 14 ...', a 'New Query' button, and a 'Sort on Year/Form' checkbox. An 'Option' section contains a dropdown for 'In the Contacts section:' set to 'Show All Contact Phone Numbers'. 'Print' and 'Cancel' buttons are at the bottom right.


- Click **Print**

## 18.1.4 Check Lists

### Admin > Reports > Check Lists > Form Check List

- Enter the **Main Title** and **Notes**
- Select **Year 10**
- Check **DOB Column**
- Enter **Column Headers** (<Tab> to create new rows)
- Enter **Column Width: 2 cm**

The screenshot shows the 'Reports' application window. On the left is a tree view with folders like 'General Reports', 'Roll Reports', 'Form Lists', 'Check Lists', 'Saved Check Lists', 'Graphs', 'Monitoring Reports', 'Address Labels', and 'Exports'. Under 'Check Lists', there are sub-items: 'Check Lists', 'Form Check Lists' (highlighted), 'Group Check Lists', 'Weekly Check Lists', and 'Form Weekly Check Lists'. The main area contains configuration fields: 'Main Title' (Excursion/Camp Checklist), 'Page Footer' (empty), 'Notes' (checked, Year 10 Camp), 'Select' section with 'Year' (10) and 'Form' (All) dropdowns, checkboxes for 'Separate by Year Group' (unchecked), 'DOB Column' (checked), 'Gender Column' (unchecked), 'Year Group Column' (unchecked), and 'Include External Roll' (unchecked), 'Sort Fields' (Surname), 'Enter Column Header Text' (Consent Form, Medical Form, Paid), and 'Column Width (Cm)' (3.00). At the bottom are 'Print' and 'Cancel' buttons.

- **Print** to the screen
- Click Save as Custom Report 
- Give your checklist a name and click **OK**

The screenshot shows a 'Report Title' dialog box with the text 'Please enter a title for the report'. Below the text is a text input field containing 'Excursion/Camp Check List'. At the bottom are 'Cancel' and 'OK' buttons.

- Click Allow Custom Report to be used by others 

**Note: Once a report has been shared, it cannot be unshared.**



### 18.1.5 Address Labels

#### Admin > Reports > Address Labels > Family Mail

- Select **Standard Labels 8x2**
- Use **New Query** to find **Year Group 10**

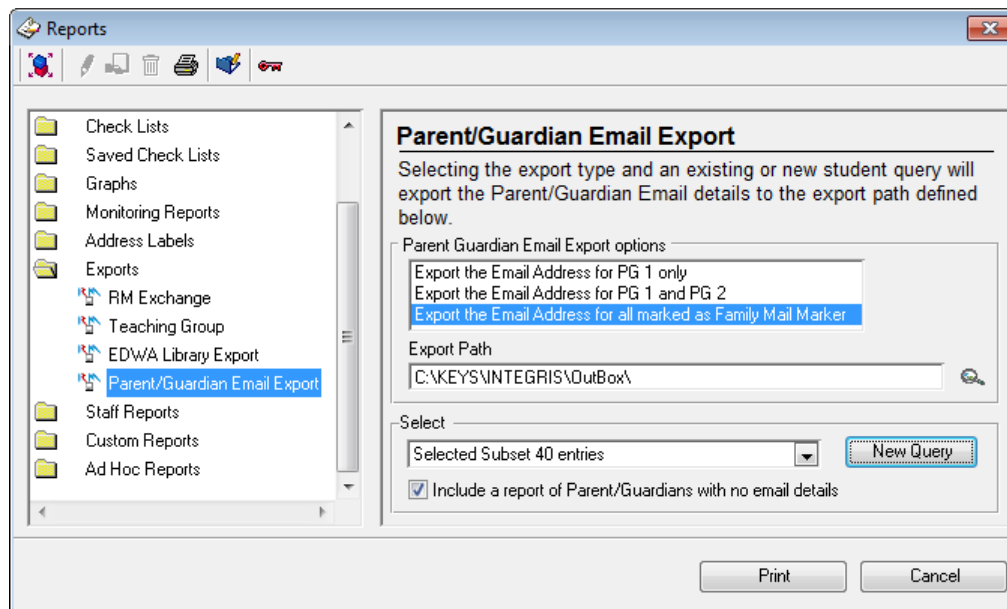
The screenshot shows the 'Reports' application window. On the left is a tree view with categories like 'Form Lists', 'Check Lists', 'Saved Check Lists', 'Graphs', 'Monitoring Reports', 'Address Labels', and 'Student Details'. Under 'Address Labels', 'Family Mail' is selected. The main area is titled 'Stationery Setup' and contains fields for 'Top Margin' (1.37), 'Left Margin' (0.47), 'Label Width' (10.16), and 'Label Height' (3.39). A dashed box represents the label area. To the right, 'Standard Labels' is set to '8x2' and 'Labels Across' is set to '2'. Below this, the 'Select' section has 'Query' set to 'Selected Subset 70 entries' and 'Salutation' set to 'Title, Initials and Surname'. There is a 'New Query' button and three checked checkboxes: 'Include Name', 'Include Year', and 'Include Form'. At the bottom are 'Print' and 'Cancel' buttons.

- **Print** to the screen

## 18.1.6 Exports

### Admin > Reports > Exports > Parent/Guardian Email Export

- Select **Export the Email Address for all marked as Family Mail Marker**
- Use **New Query** to find **Year Group 8**



- Click **Print**
- Select the desktop to Save the Export file
- Click Save and OK
- View and Close the exception Report.


This Report displays any students where no email addresses were located in the student record.

- Navigate to your desktop to open and view the file

**Note: The Export file defaults to save to the Outbox but can be saved in any location. The Export file may be opened and viewed in Microsoft Excel. Email Addresses can be copied from the excel file and pasted into the "To" box of your email client (e.g. Outlook)**

## 18.2WA Reports

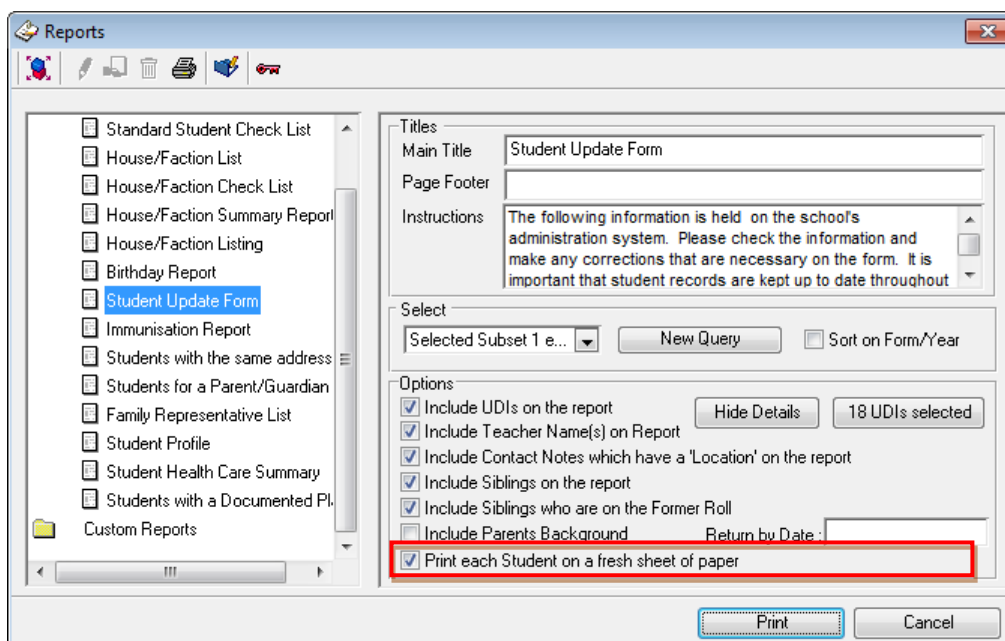
The WA Reports module has been specified by the WA Department of Education. These reports provide schools with additional standard reports.

WA Reports can be accessed from the Sidebar or from the Student Profile Icon  on the top toolbar. If activating from the Student Profile Icon the software will default to open that report.

### Activity: WA Reports

#### WA Reports > Reports > WA Reports > Student Update Form

- Use **New Query** to find **Penelope Allen**
- Check the desired **Options**
- Enter a **Return by Date** a week from TODAY



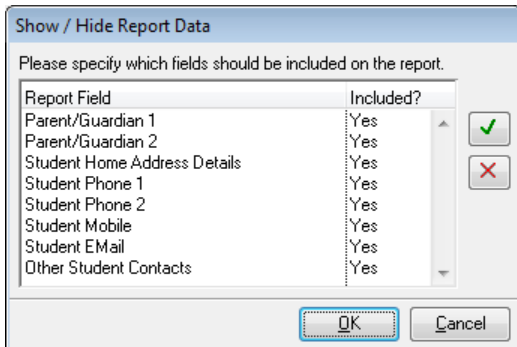
The screenshot shows the 'Reports' window with the 'Student Update Form' report selected. The 'Titles' section shows 'Main Title' as 'Student Update Form' and 'Page Footer' as empty. The 'Instructions' section contains text about the school's administration system. The 'Select' section shows 'Selected Subset 1 e...' and a 'New Query' button. The 'Options' section has several checkboxes: 'Include UDIs on the report' (checked), 'Include Teacher Name(s) on Report' (checked), 'Include Contact Notes which have a 'Location' on the report' (checked), 'Include Siblings on the report' (checked), 'Include Siblings who are on the Former Roll' (checked), 'Include Parents Background' (unchecked), and 'Print each Student on a fresh sheet of paper' (checked). A 'Return by Date' field is also present. The 'Print' button is highlighted.

**Note: Reports for each student may now be started on a new page**

- **Print** the report to screen
- View and close the report

We can run this report again but this time we can now hide some details from the Update form.

- Click on Hide Details 
- Select some details to hide including Other Student Contacts and click on the cross



Dialog box titled "Show / Hide Report Data". It contains a table with columns "Report Field" and "Included?". The table lists several fields, all of which are currently set to "Yes". To the right of the table are two buttons: a green checkmark and a red X. At the bottom are "OK" and "Cancel" buttons.

Report Field	Included?
Parent/Guardian 1	Yes
Parent/Guardian 2	Yes
Student Home Address Details	Yes
Student Phone 1	Yes
Student Phone 2	Yes
Student Mobile	Yes
Student Email	Yes
Other Student Contacts	Yes

- Click on Other Contacts and select a contact to display and click on the tick



Dialog box titled "Select". It has a dropdown menu set to "Selected Subset 1 e..." and buttons for "New Query" and "Sort on Form/Year". Below is a table titled "Select contacts to be excluded from the report" with columns "Other Contact", "Emrg", "Relationship", and "Include?". Two contacts are listed: "Mr & Mrs Allen" and "Mrs Janet Wheeler". To the right of the table are buttons for a green checkmark, a red X, and "< Back".

Other Contact	Emrg	Relationship	Include?
Mr & Mrs Allen	3	Grandparents	No
Mrs Janet Wheeler	2	Aunt	No

- Click **OK** and then **Print** to run the report again
- Check that these details have been removed from the report.

## WA Reports > Reports > WA Reports > Student Profile Report

- Click on Student Profile Report Icon



This Icon provides a shortcut to the WA Reports Sidebar and defaults to the Student Profile Report. The Student Profile Report can give us an overview of Behaviour, Attendance and Student Activity data. These can be accessed all at once or separately through this report.

**Reports**

Titles  
Main Title: Student Profile  
Page Footer:

Student Selection: 13 Behaviour Type(s) / 7 Action(s) Attendance Activity Type

Options  
☒ Page per student  
☒ Display All  
☐ Behaviour  
☐ Attendance  
☐ Student Activities

Select  
Date Range from: 1 FEB 2019 to:

Print Cancel

- Enter the dates as **1 Feb 2019** to today's date
- Click on **New Query**
- Find **Tamara Bandy**

**Student Search Results**

Reference	Surname	Preferred Name	Year	Form	Date of Birth
882	Bandy	Brandy	8	08.2	25 JAN 2007
9	Bandy	Tamara	9	09.1	15 AUG 2005

Total records found: 2

Back Select Close

- Click on the **Behaviour Types/Actions** tab
- All **Behaviours** are checked by default

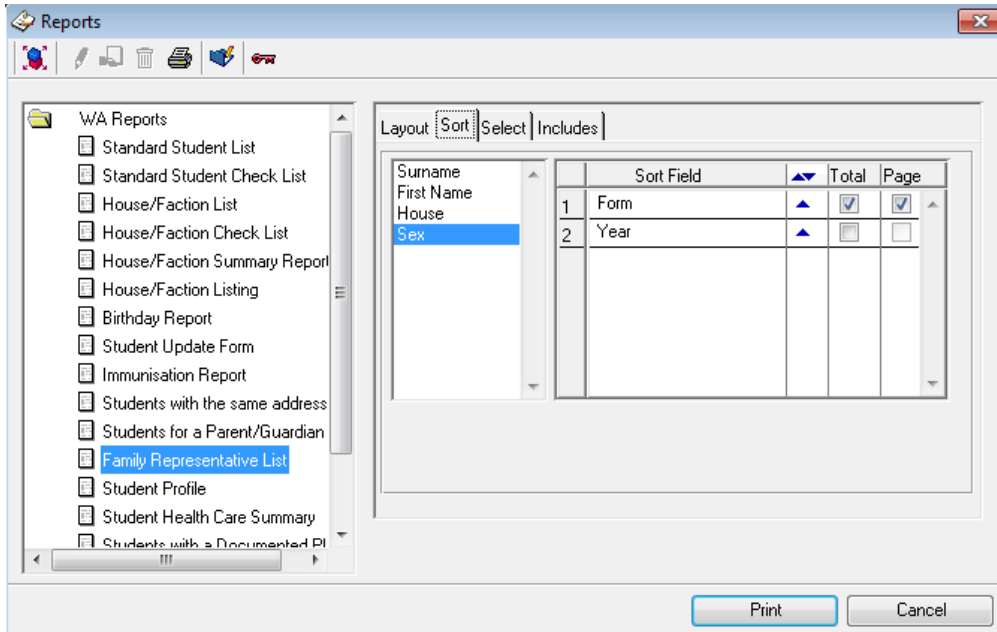
- Click on the **Attendance** tab


Show attendance details is checked by default

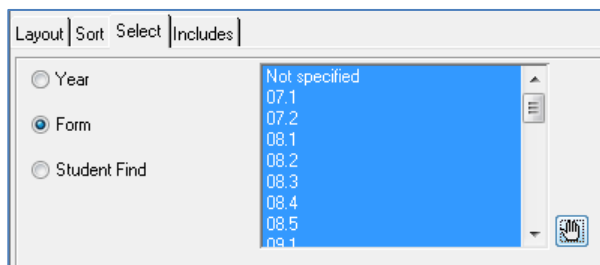
- Click on the **Activity Types** tab
- Check **Show Activity Details**
- Click **Print**
- View and close the report

## WA Reports > Reports > WA Reports > Family Representative List

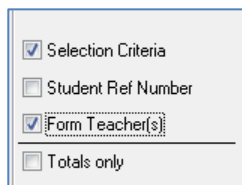
- Click the **Sort** tab
- Sort by **Form** then **Year**
- Check **Total** for **Form** and **Page**



- Click the **Select** tab
- Click the radio button for **Form**
- Click **Select All** 



- Click the **Includes** tab
- Check **Selection Criteria**



- **Print** to screen

## WA Reports > Reports > WA Reports > Student Health Care Summary

The Student Health Care Summary (Form 1) is now available through the WA Reports menu

- Click on **New Query**
- Select all the students in **Year Group K**
- Type in a footer message

The screenshot shows the 'Reports' window. The left pane lists various report types, including 'House/Faction List', 'House/Faction Check List', 'House/Faction Summary Report', 'House/Faction Listing', 'Birthday Report', 'Student Update Form', 'Immunisation Report', 'Students with the same address', 'Students for a Parent/Guardian', 'Family Representative List', 'Student Profile', 'Student Health Care Summary' (highlighted), 'Students with a Documented PI', 'Family Mail Marker List', and 'Custom Reports'. The right pane contains a 'Titles' section with 'Main Title' set to 'Student Health Care Summary' and 'Page Footer' set to 'Please complete and return to the office ASAP'. Below this is a 'Select' section with a dropdown menu showing 'Selected Subset 9 e...' and a 'New Query' button. At the bottom right are 'Print' and 'Cancel' buttons.

**Note: As this form is being run as a report, it does not create a Student Activity log against the student's record.**



## WA Reports > Reports > WA Reports > Students with a Documented Plan

- Select **All Students in Care of DCP**
- Click **Print**

The screenshot shows the 'Reports' application window. On the left is a tree view of report categories. The 'Details' tab is active on the right. Under 'Titles', the 'Main Title' field contains 'Students with a Documented Plan'. Under 'Include', the radio button for 'All Students in Care of DCP' is selected. Below this, there are two rows of date selection fields: 'Documented Plan forwarded to DCP Date' and 'Documented Plan Review Date', each with 'From' and 'To' sub-fields. At the bottom right are 'Print' and 'Cancel' buttons.

This Report can be run to show ALL students with a Documented Plan or select them based on the Plan Completion and/or Review Dates.

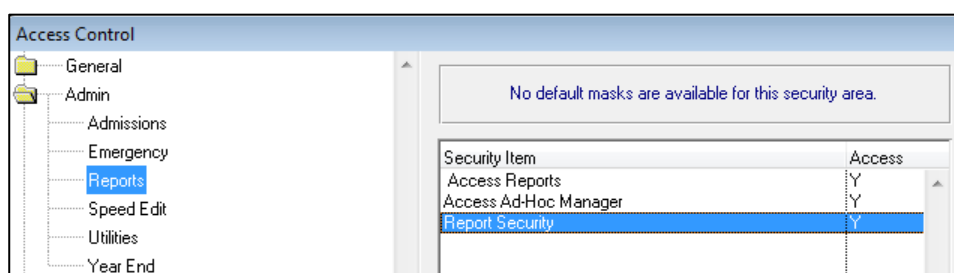
## 18.3 Report Security

There are three main steps in setting up access and security for Admin Reports:

1. Allocate report security access rights to appropriate users
2. Set the report security profile
3. Activate Report Security

### Step 1: Allocate report security access rights to appropriate users



This enables the appropriate users to specify which reports are accessible by which Integrus users. Access can be enabled in General > Control > Users - in the Reports section of the Access Control window.



### Step 2: Set Report Security Profile

This function enables schools to allocate access to specified reports to users as appropriate. The function is only available to users who have had access rights allocated in Step 1.

There are two options for allocating access to reports:

1. Allocate Reports to Users 
2. Allocate Users to Reports 

**Note: It is recommended that Schools contact the Customer Service Centre to discuss their needs and are encouraged to carefully consider all possible implications before using Report Security Settings.**

## 19 Backing Up

For Department of Education and Training schools, a back-up is completed each day on your server. A warning message will be displayed if a back-up is unsuccessful. Should this warning appear, please contact the Customer Service Centre.

The Backup Wizard is available for backups required before performing major changes to the datafile.

If you do not have the SIS Backup Wizard please contact the Customer Service Centre on 9264 5555 or 1800 012 828

In the case of a system crash, your data may be restored from the backup so it is imperative that your back-up routines are stable and regular.

## 20 User Accounts

RM Asia-Pacific will have set up three users on the system:

- **EDWA** – for the Department to assist you remotely
- **ADMIN** – for Civica to assist you remotely
- **SCHADM** – this is the System Administrator account for the school

For security purposes, you will need to change the password for the **SCHADM** user.

Set up the required users' user names, passwords and access.

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## 22 Support

Should you require support please contact the **Customer Service Centre (CSC)** at the Department of Education and Training.

Contact details below:

### 22.1 Phone (CSC)

Metro: 9264 5555

Country: 1800 012 828

Please be prepared to supply your *ID number, contact details* and a *brief description* of the problem.

### 22.2 Fax (CSC)

9264 4701

Please include your *ID number, contact details* and a *brief description* of the problem.

### 22.3 Email (CSC)

[customer.service.centre@education.wa.edu.au](mailto:customer.service.centre@education.wa.edu.au)

Please include your *ID number, contact details* and a *brief description* of the problem.

## 23 Online Manuals and Training Notes

### 23.1 Civica Education

Online manuals and training notes are available to download in PDF format from the Civica Education website.

[www.civicaeducation.com.au](http://www.civicaeducation.com.au)

Select **Support | Integris Support**

Click Login for **Western Australian SIS Schools**

Username: school

Password: help

### 23.2 STIMS Project

The Department's Student Information Management Project (STIMS) website has numerous factsheets and support documents for all SIS Administration modules.

<http://www.det.wa.edu.au/intranet/stims>

Links to the Integris Manuals are also available from the STIMS website or by going to Help within Integris.