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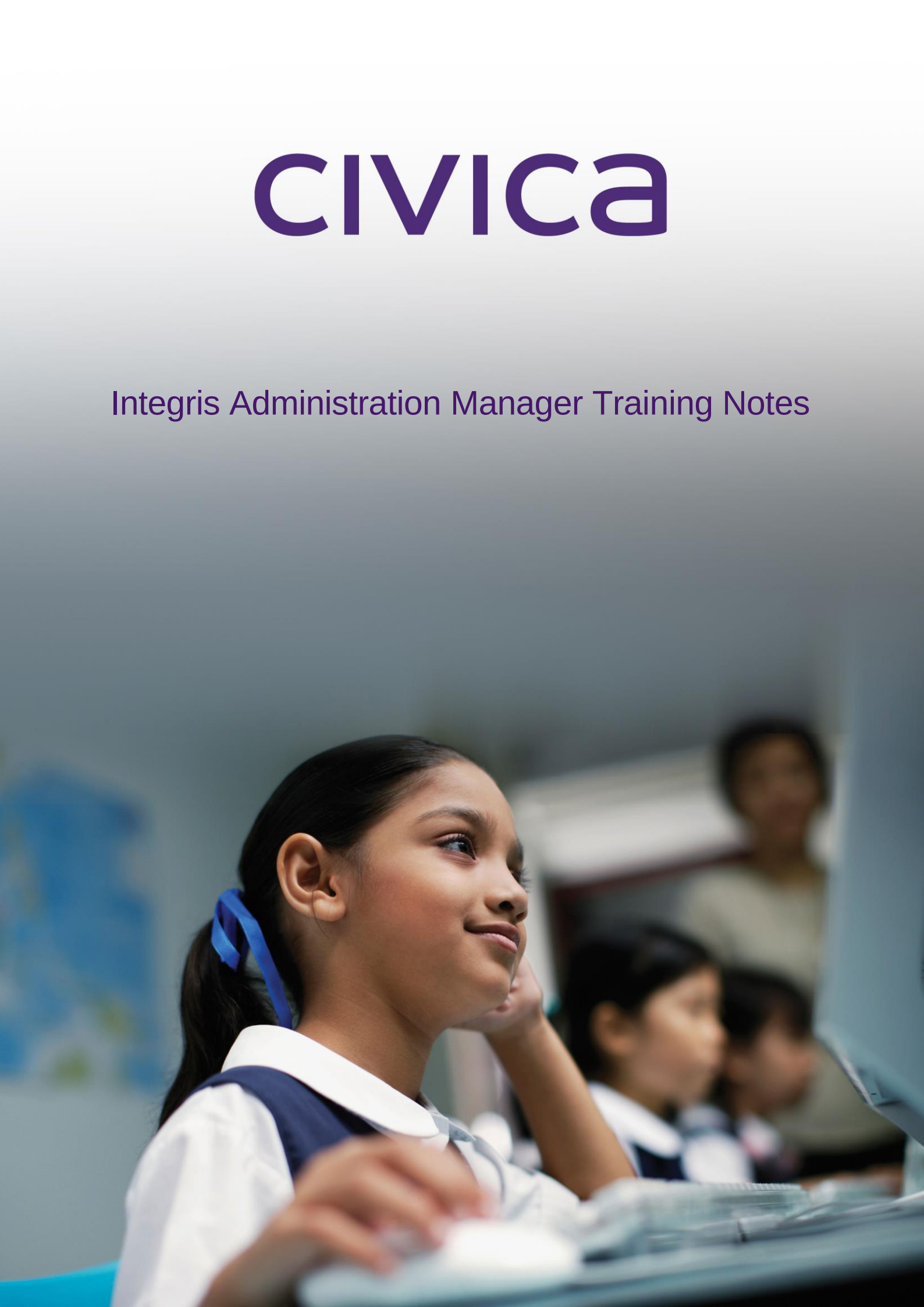
Integris Administration Manager Training Notes



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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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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

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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

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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

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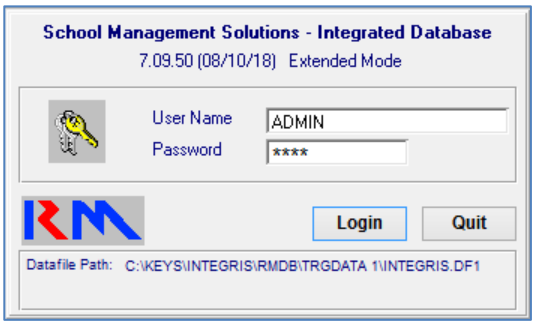
1.4 Logging On

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***



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

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

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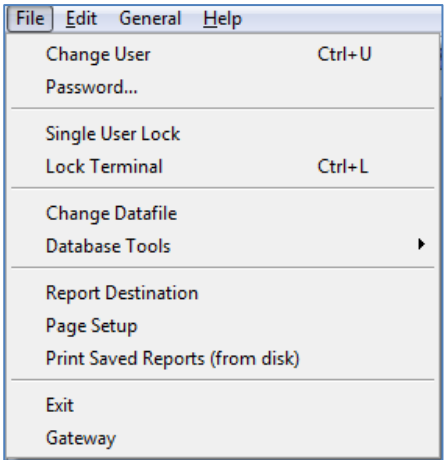
2 Menus

2.1 The File Menu

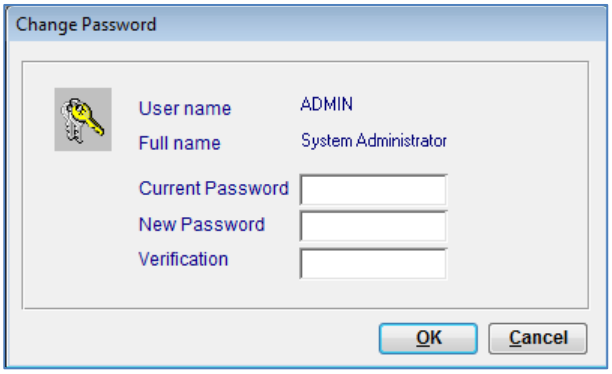


2.1.1 Change Password

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

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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

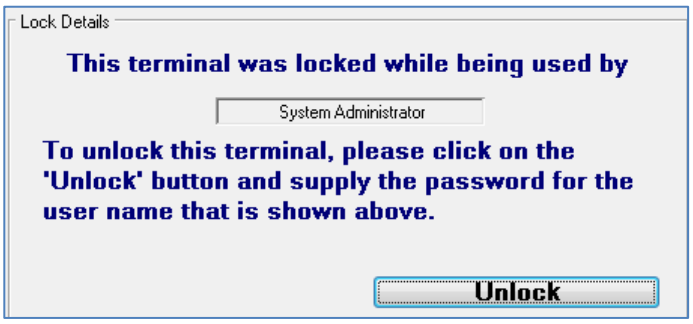
- Log in again with the User Name ***ADMIN*** and the Password ***keys***

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***

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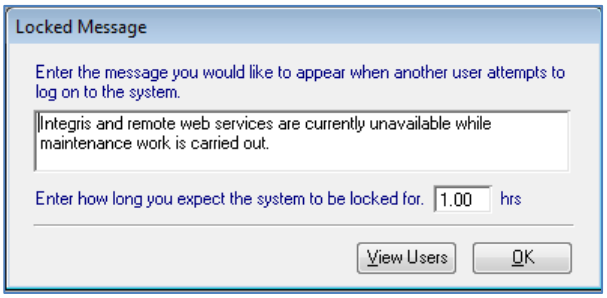
2.1.4 Single User Lock

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:

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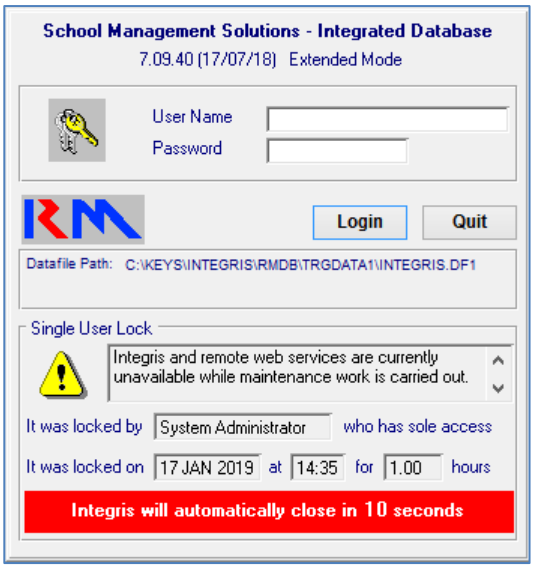
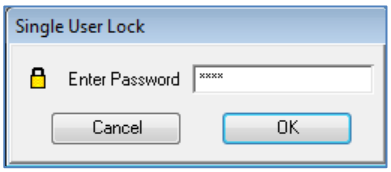
When the lock is applied, users attempting to access the system will be presented with a message indicating the system will be unavailable for a specified period of time. This window will automatically close and exit the Integris session after 15 seconds. Only Administrators who initiated the lock can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



To return to Multi-user mode:

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



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

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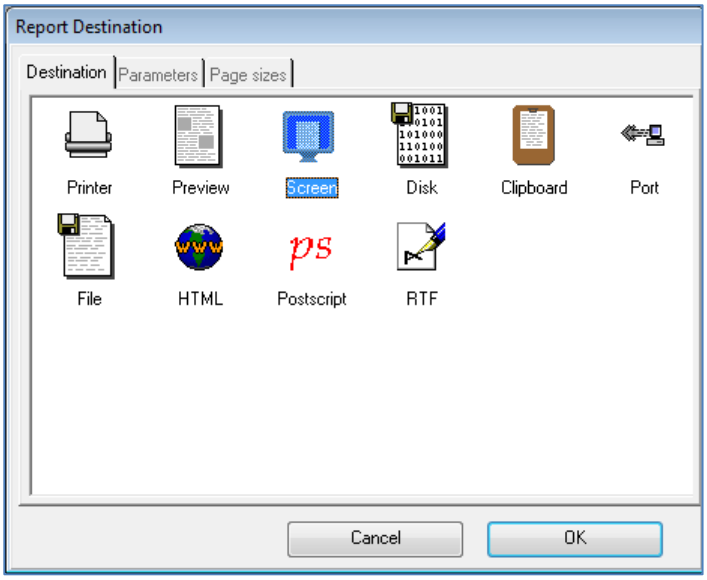
2.1.5 Report Destination

Activity

File > Report Destination



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

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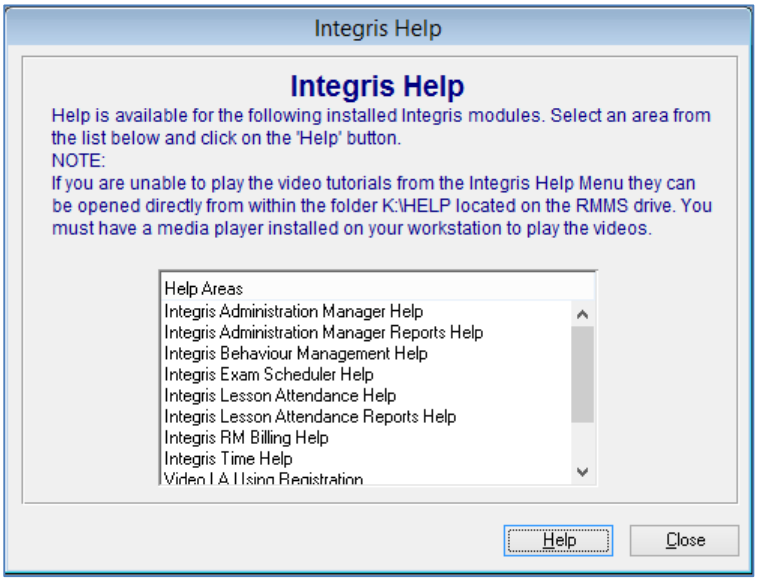
2.2 The Help Menu

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***

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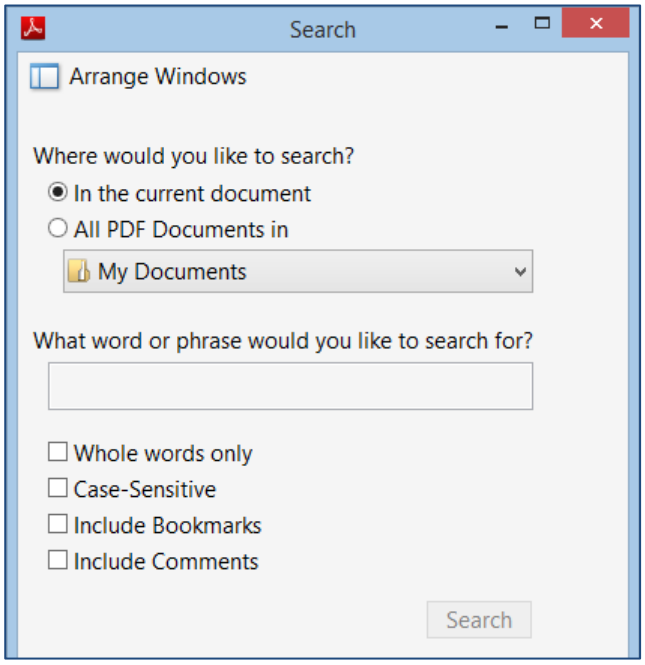
Notes: <Ctrl + F> allows you to search a document for a specific topic. Check Section 22 of these Training Notes for all details of Support available to schools. Holding down <Shift> <Ctrl> + F will open the Full Reader Search window as shown below.



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2.3 Using the Side Bars

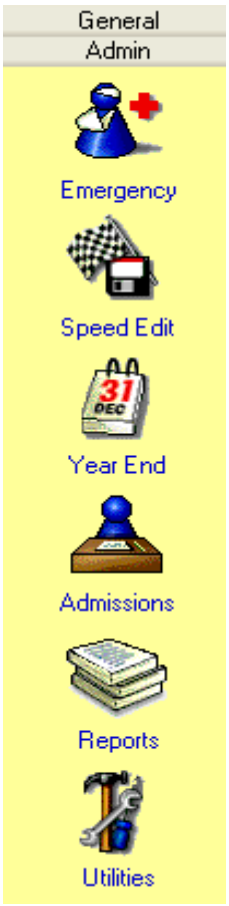
Once you have logged onto the system, a blank window with a control panel (side bar) appears on the right-hand side of the screen. The **General** side bar is displayed.

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:

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3 System Preferences

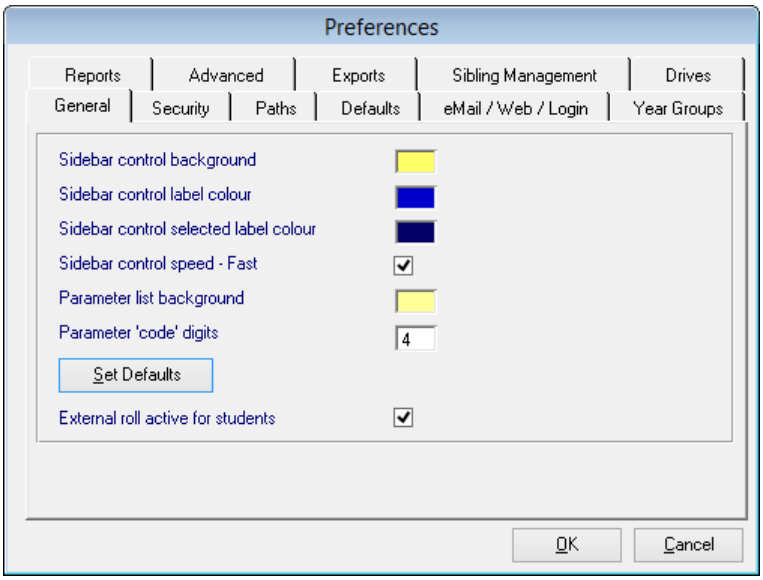
General > Control > Preferences

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***



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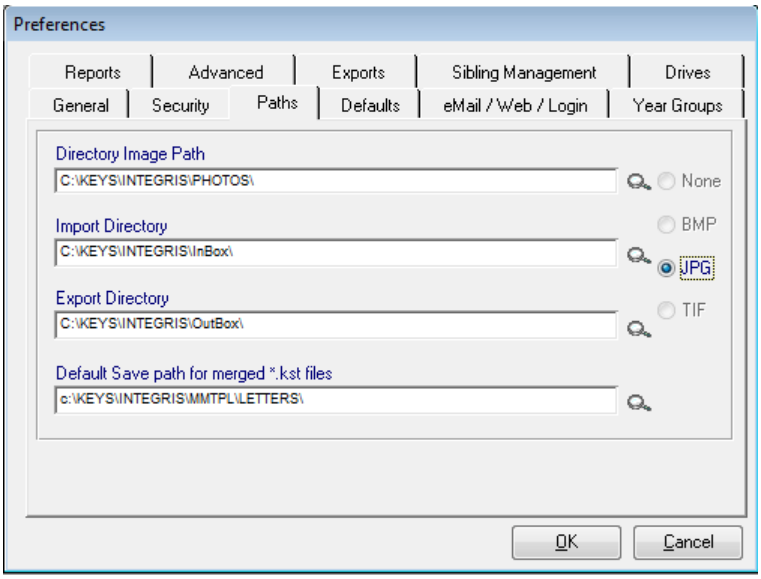
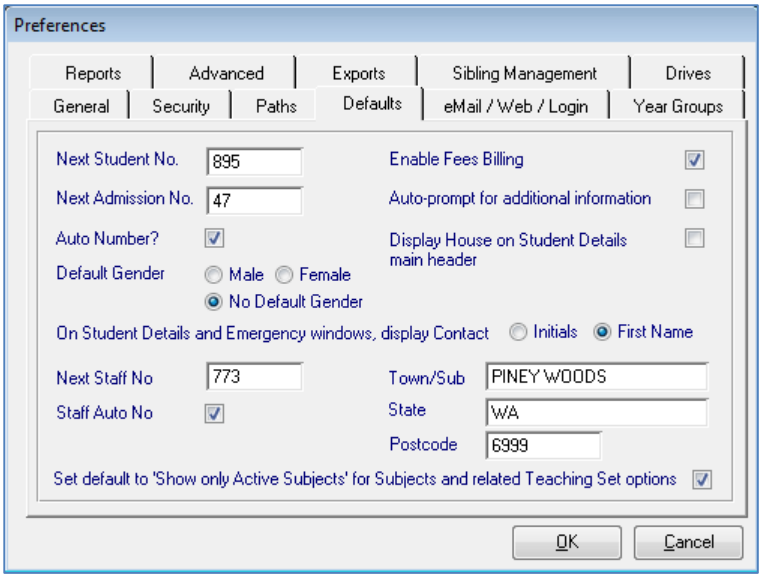
General > Control > Preferences > Paths tab

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



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



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.

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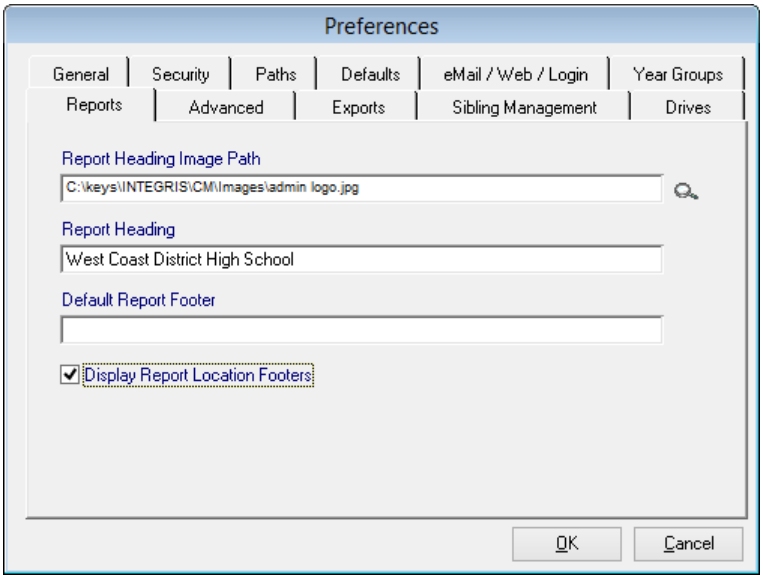
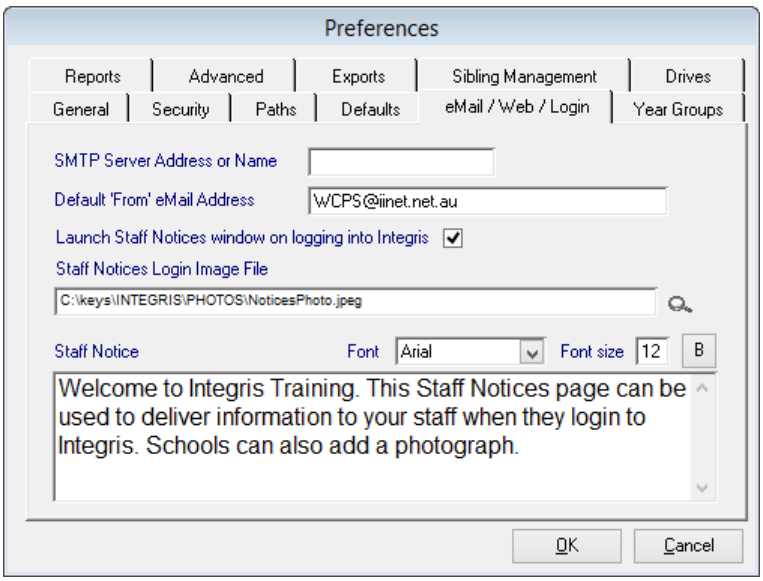
General > Control > Preferences > Reports tab



- Tick the box to Display Report Location Footers

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



- 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.

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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.

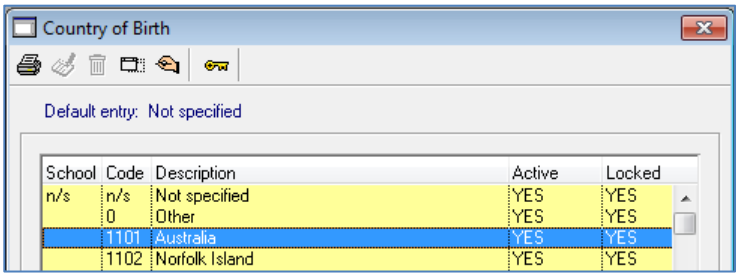
The Department of Education (DoE) manages several data fields. These fields must not be edited or added to. DoE will ensure that these key parameter fields are updated as required. The managed fields are:

- 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

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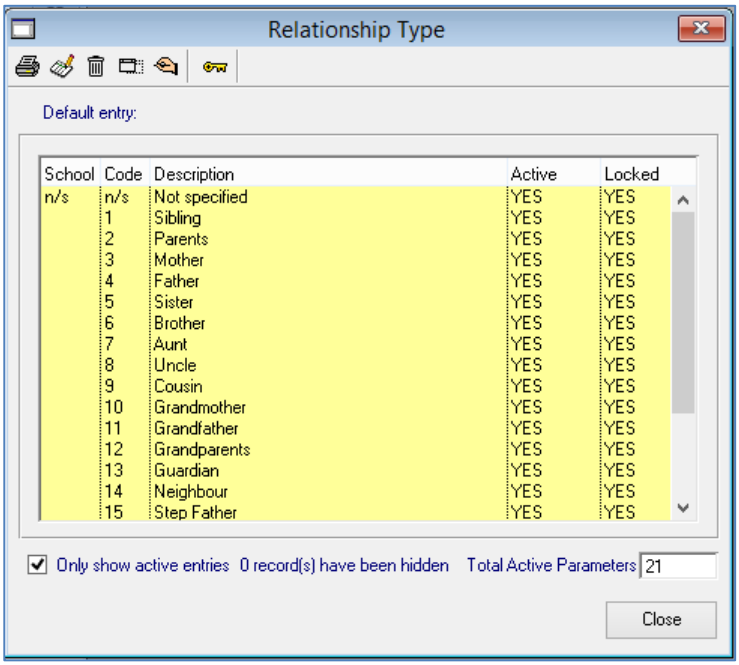
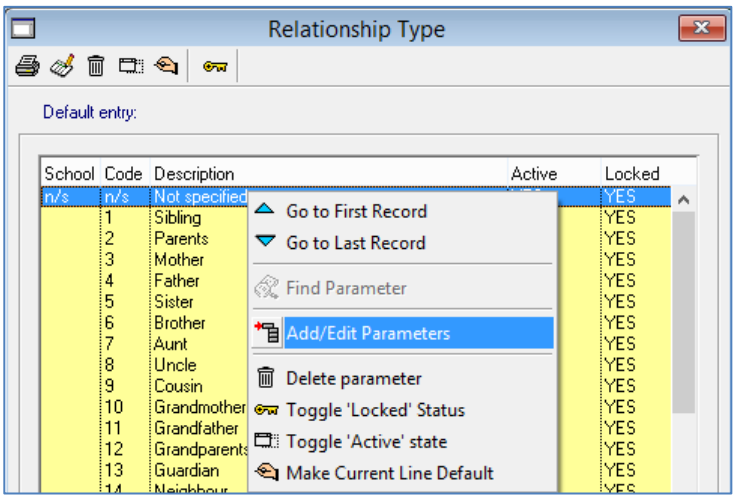
General > Parameters > Relationship Type



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 ***Partne***r as the Description

School	Code.	Description
	21	Partner

- Click ***OK***

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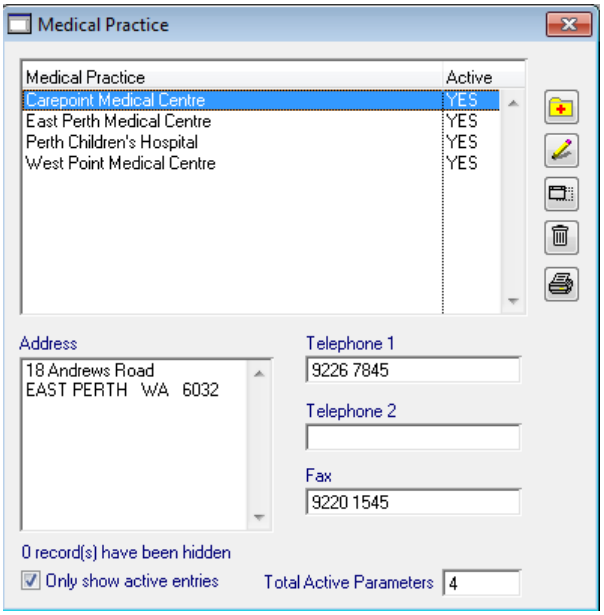
- Highlight the new parameter and lock it

- 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

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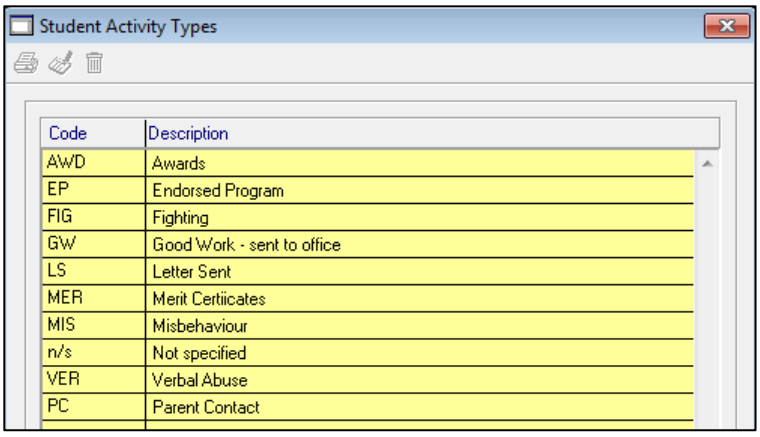
General > Parameters > Student Activity Types

- 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***



- Close the ***Student Activity Types*** window

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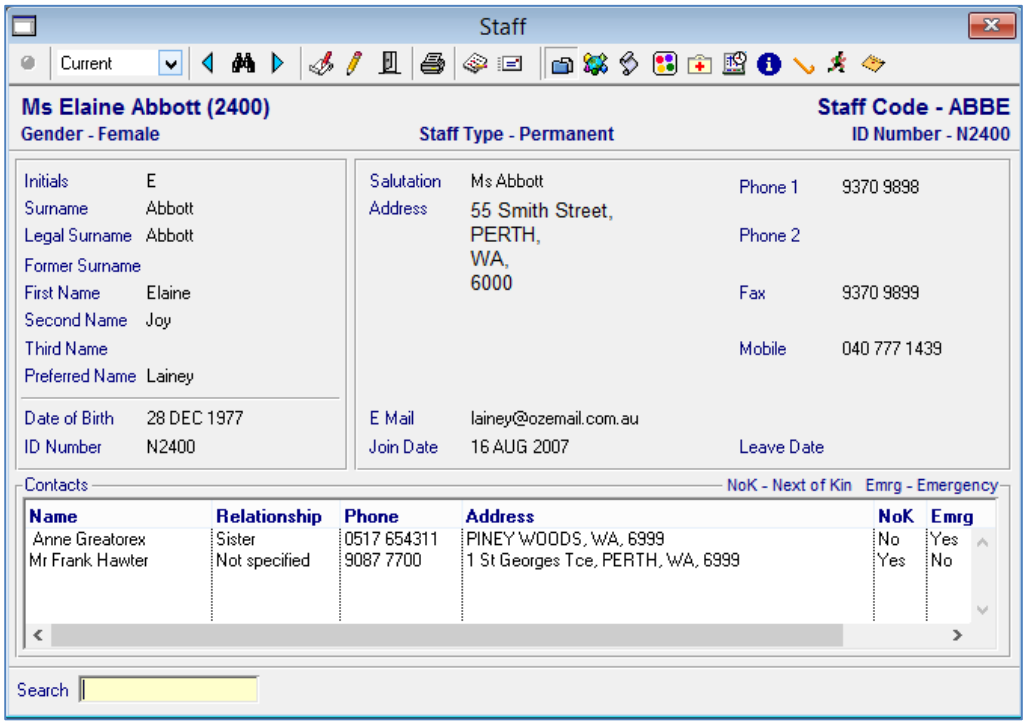
5 Staff Details

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.



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

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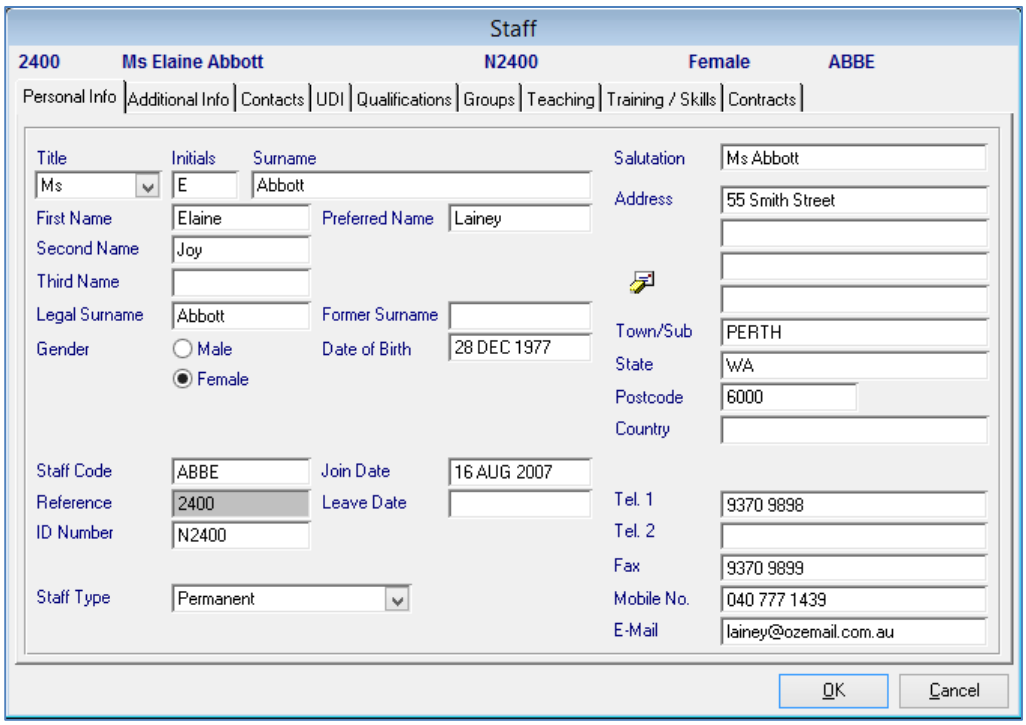

To edit a staff member's details, locate their record and click on **Edit**.

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

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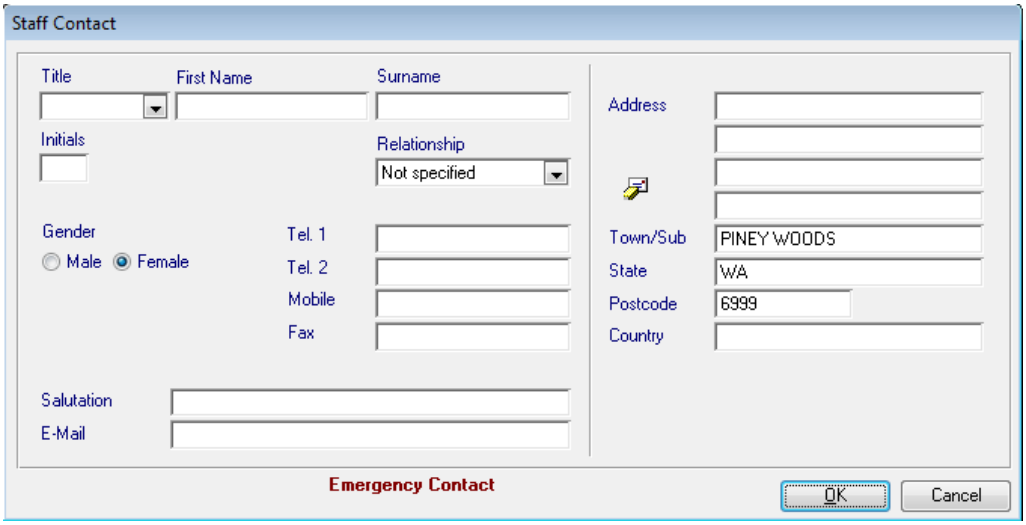
Contacts

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

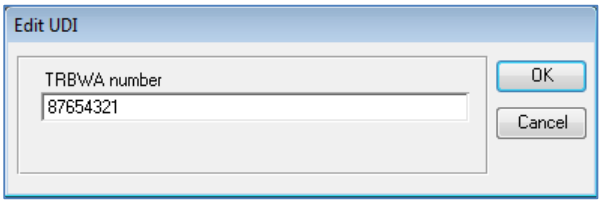


- Click ***OK***
- Place a tick in each of the ***Emergency*** and ***Next of Kin*** checkboxes

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



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

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

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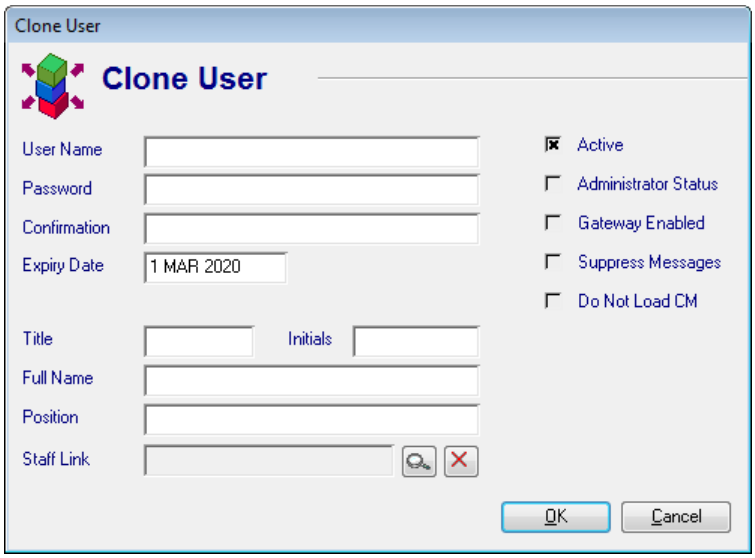
6 Administrator Tasks

6.1 Setting up New Users

General > Control > Users

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



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

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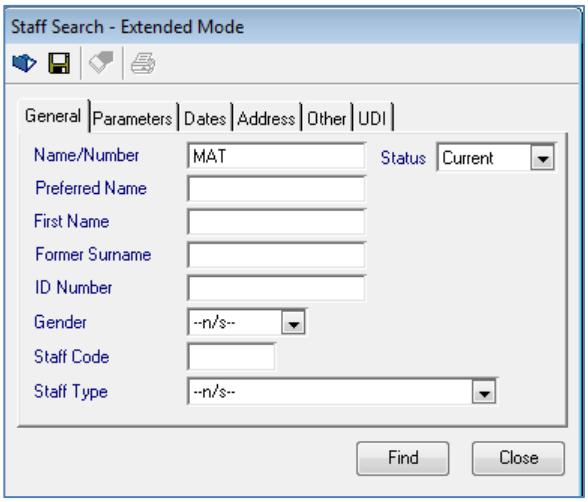
- Enter the first three letters of your surname in the ***Name/Number*** field
- Click ***Find***



- 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.

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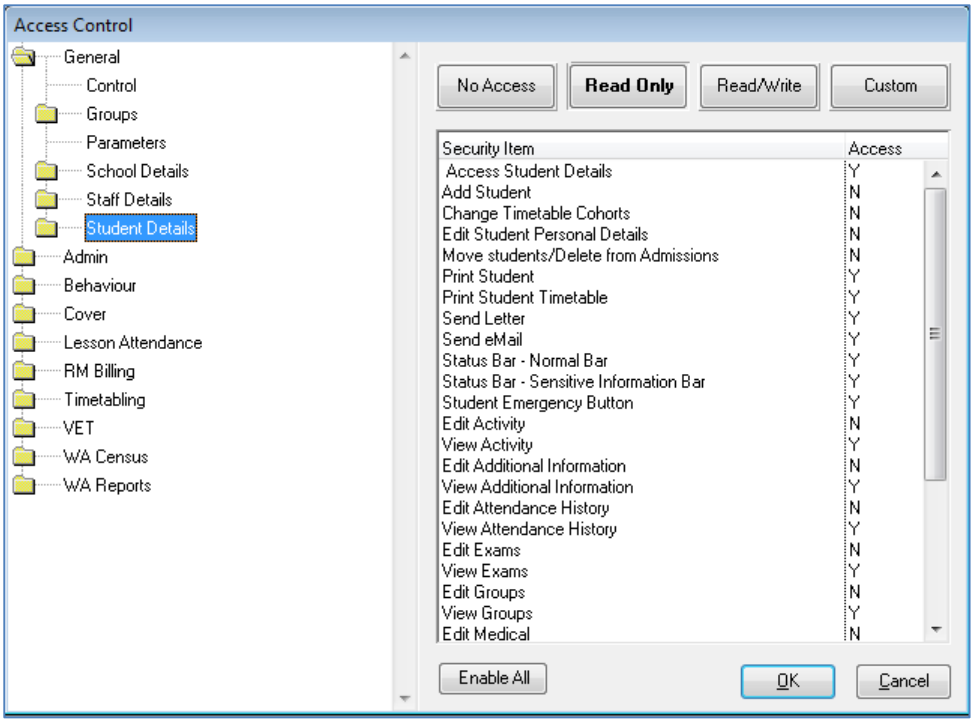
6.2 User Access Rights

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

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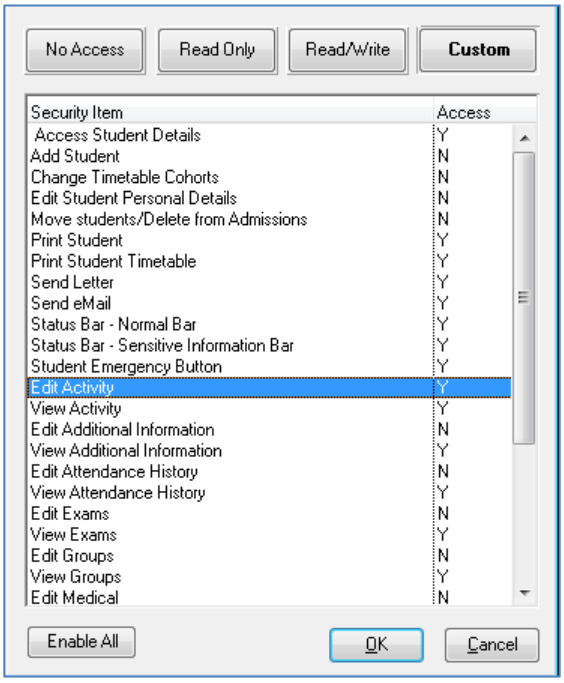
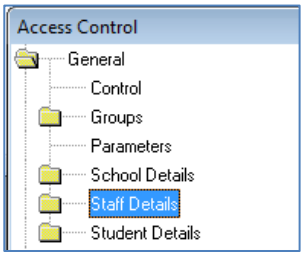
- Double click on ***Edit Activity*** to grant her access to Students' activities



- Highlight ***Staff Details***



- Click

- Click ***OK***

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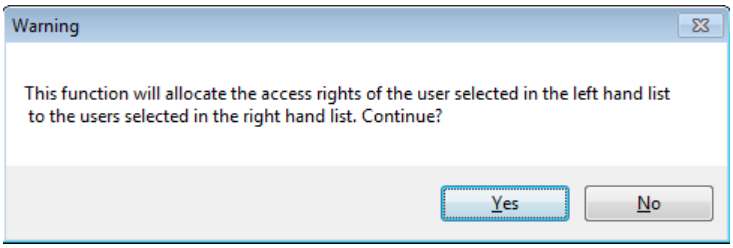
6.2.2 Copying Access Rights

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.

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6.2.3 Making User Accounts Inactive

Activity

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

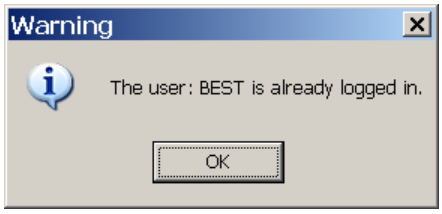
General > Control > Users

- 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

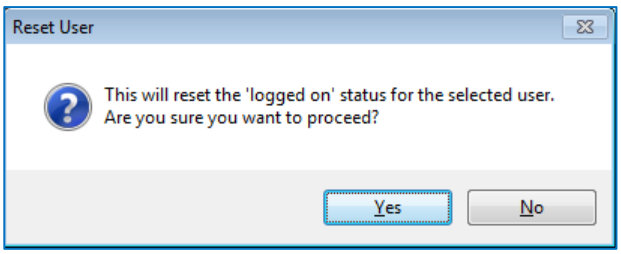
In the event of a system crash it may be necessary to reset a user's account. For example, there was a power failure when Carl Best was logged in. When he tried to log in again, the following message appeared:



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

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6.2.5 Resetting All Users

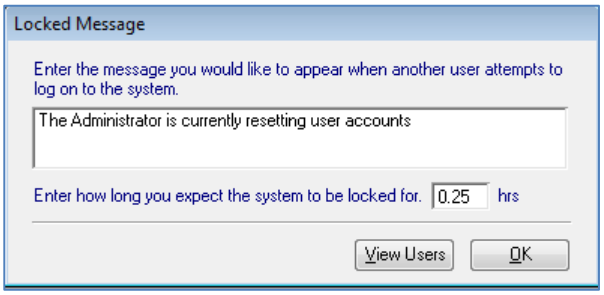
Note: From Integris version 6.96 the resetallusers function runs on the first Integris login of the day, meaning all users will be automatically reset each day.

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

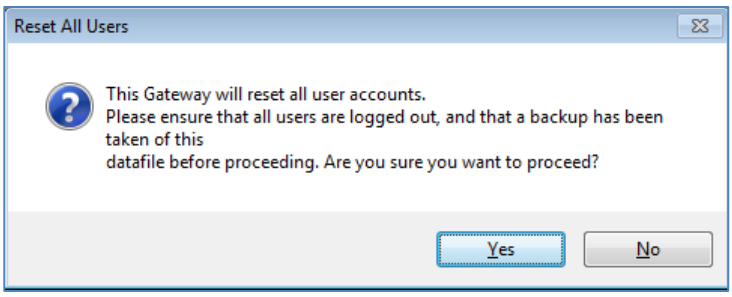
- Enter the password ***keys***
- Click ***OK***
- View the locked message and click ***OK***



File > Gateway

- Enter the text ***resetallusers***

- *Press* ***<Enter>***



- Click ***Yes***

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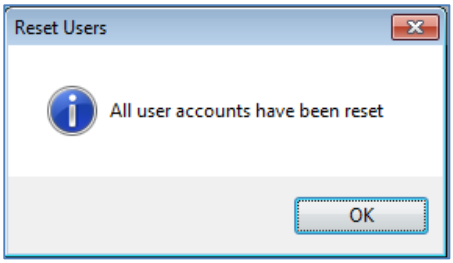
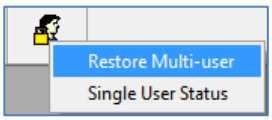
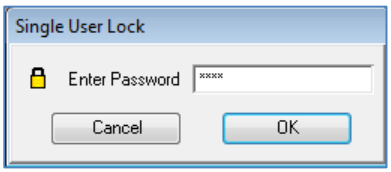


- Click ***OK***
- Restore Multi-user



- Enter the password **Keys**



- Click **OK**

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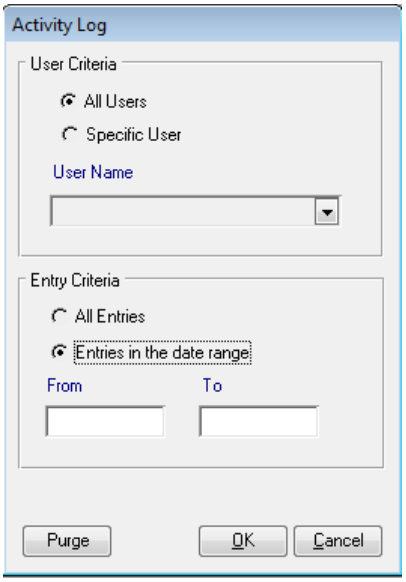
6.2.6 Audit

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



- 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

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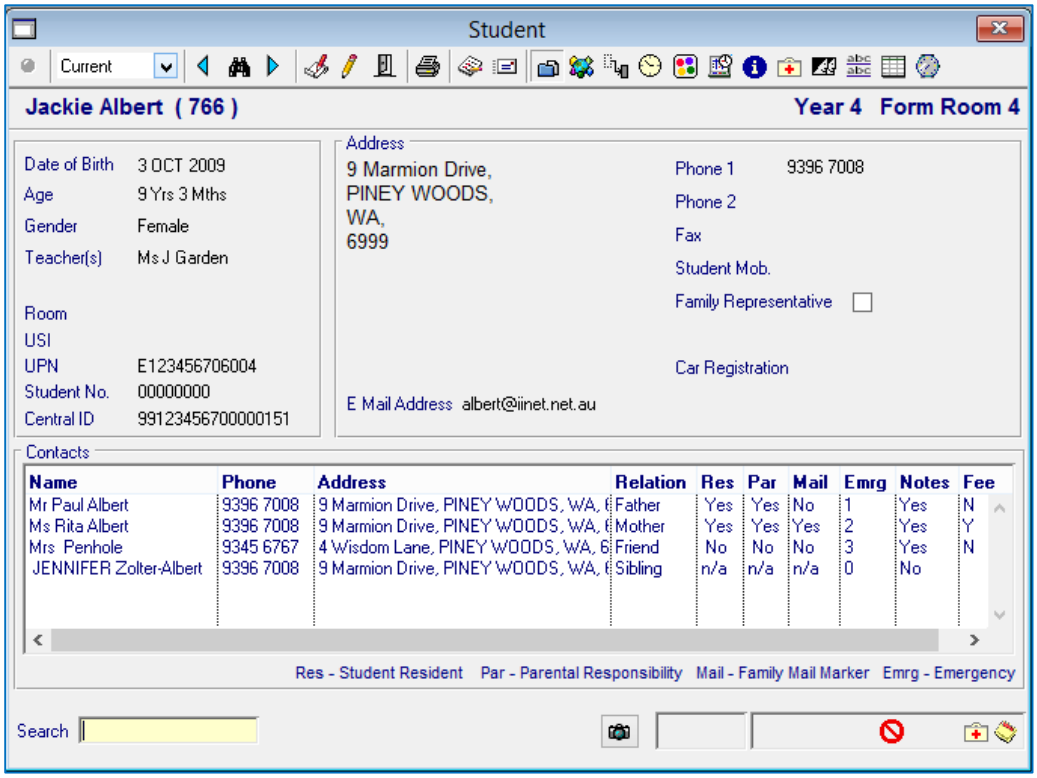
7 Student Details

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:



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.

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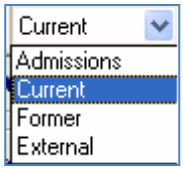
Student Details Toolbar



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

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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

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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

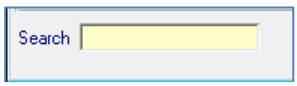
The Previous Student/Next Student arrows are located at the top left of the Student window.

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

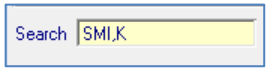
The Summary screen in Student Details provides a Simple Student Search facility to enable the user to quickly locate and load a specific student's record. It is located at the bottom left corner of the Student window.



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***>

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

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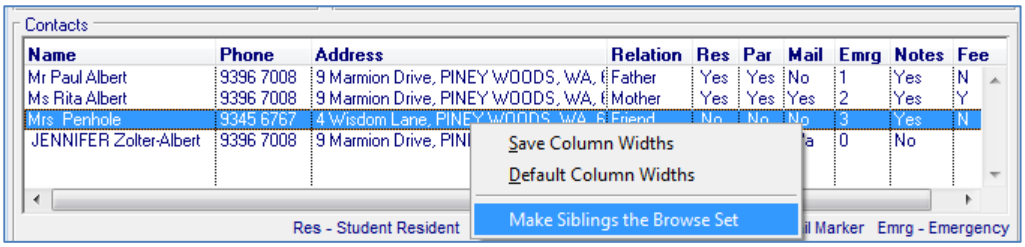
7.1.3 Make Siblings the Browse Set

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

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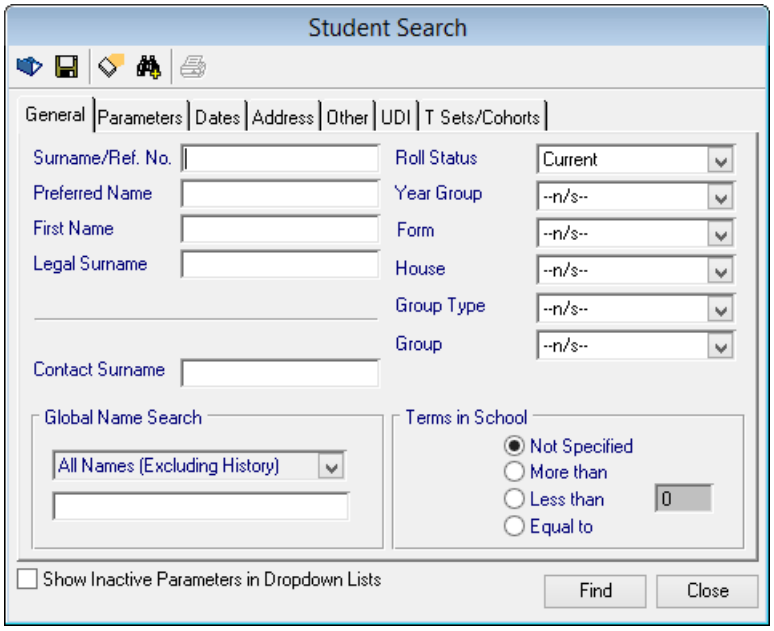
7.1.4 Find Student Function

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.

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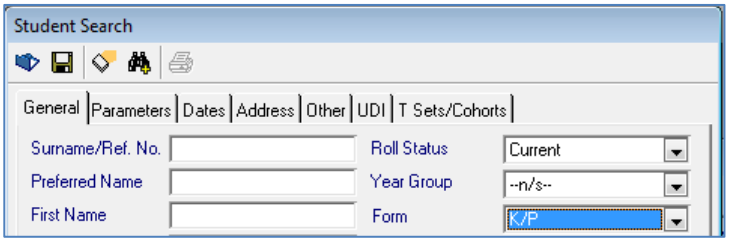
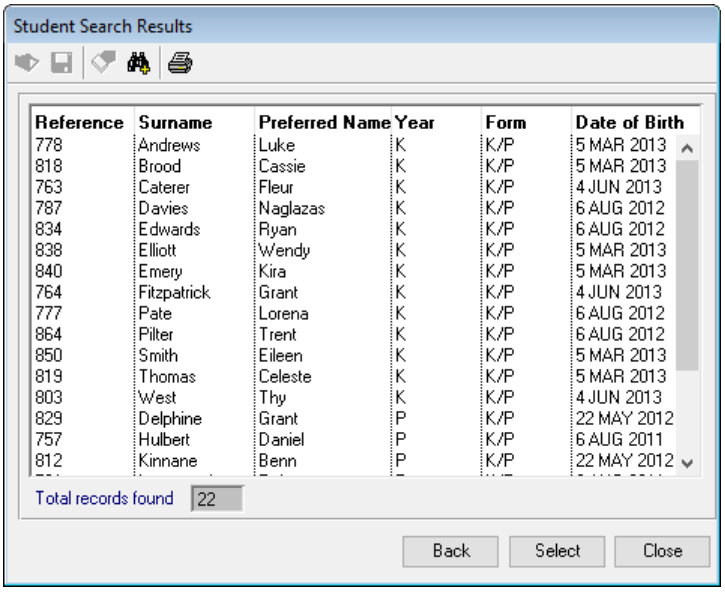
Activity

Find the students in K/P Form

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



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



- Click on Print to print a list

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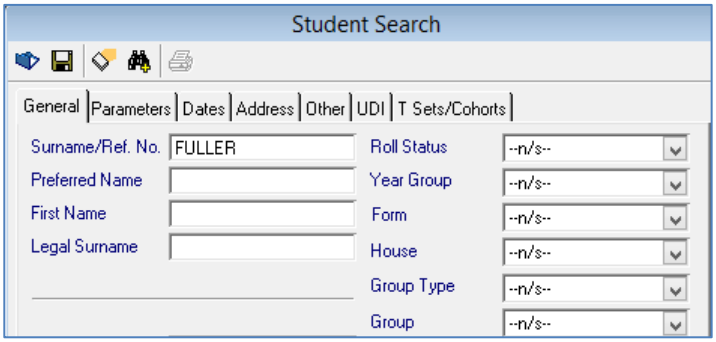
Find students using Surname and Roll Status

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

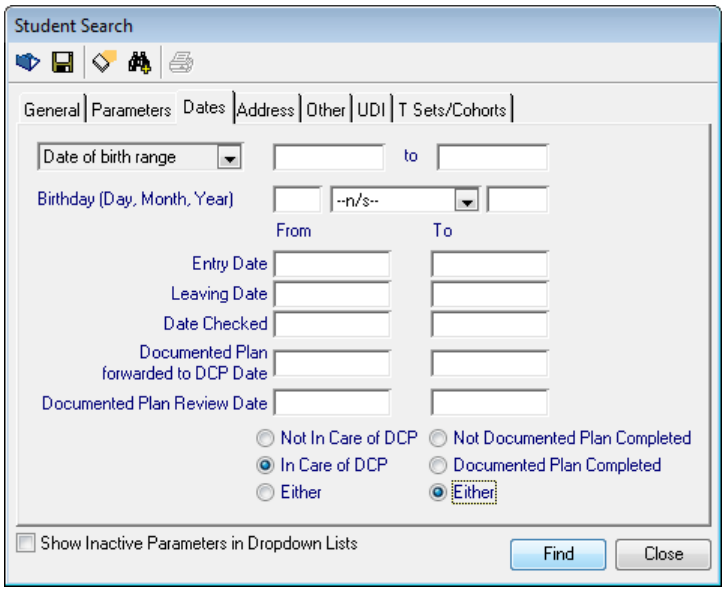


- Click ***Find*** or <***Enter***>

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

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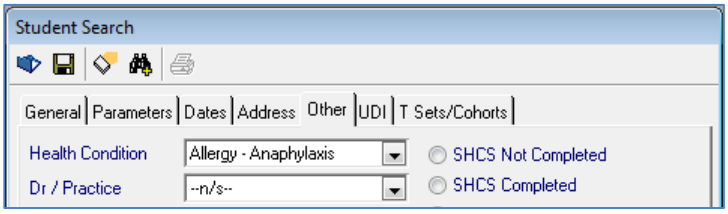
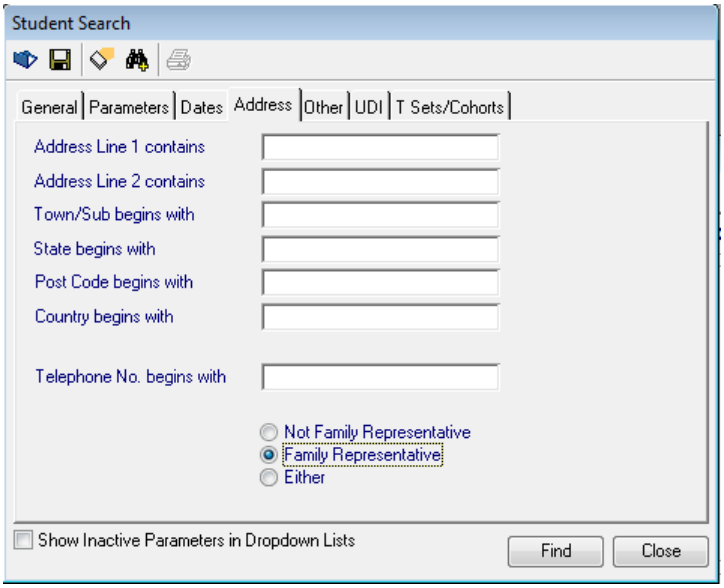
Find students with a Health Condition

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



- 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



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

- Click **Back** and clear your settings

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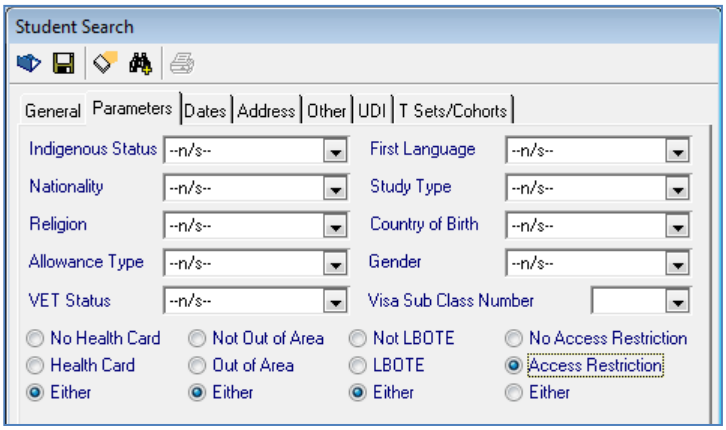
- Find the Students with an ***Access Restriction***
- Click on the ***Parameters*** Tab



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

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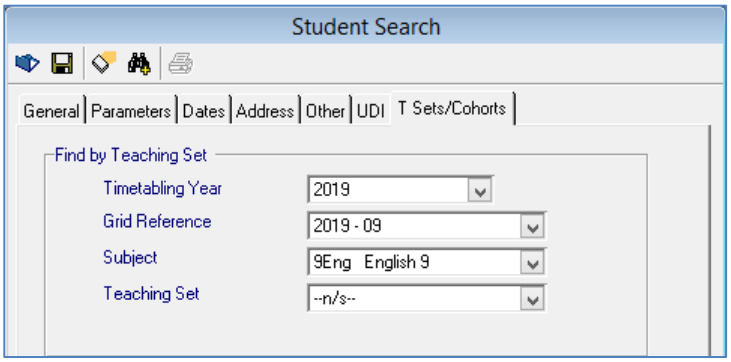
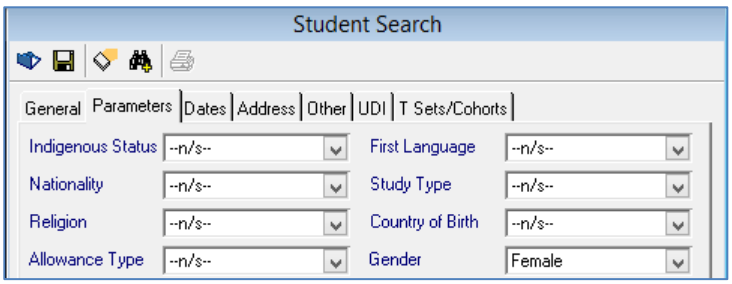
7.1.5 Saving and Loading a Query

Activity

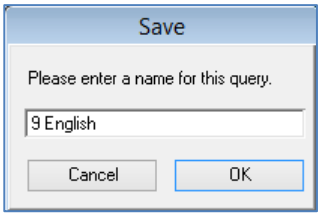
Find students by Teaching Set

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





- Save this query



- 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

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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.

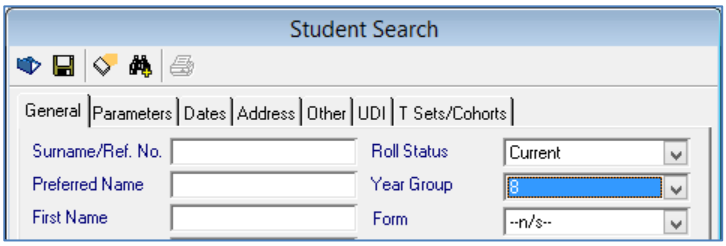
For example, a normal student search could be performed using the tool.

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.

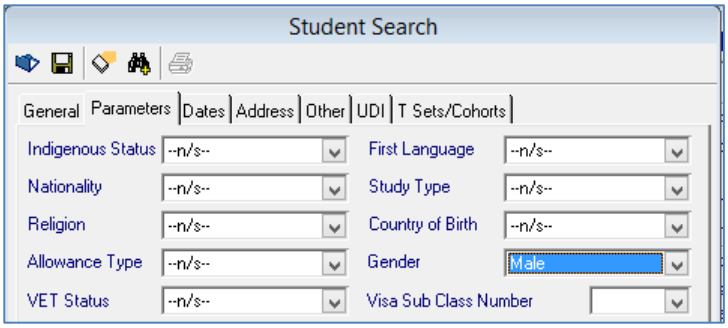
Activity

Find the Year 8 and 9 Boys

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



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



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

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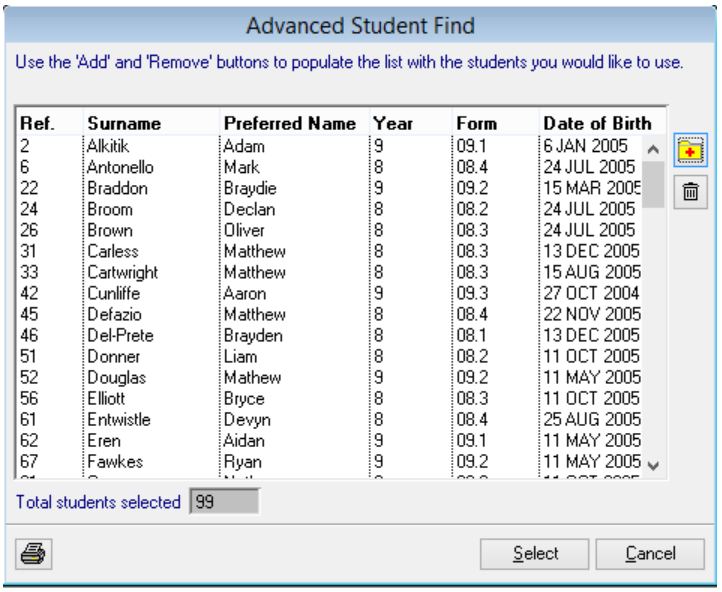
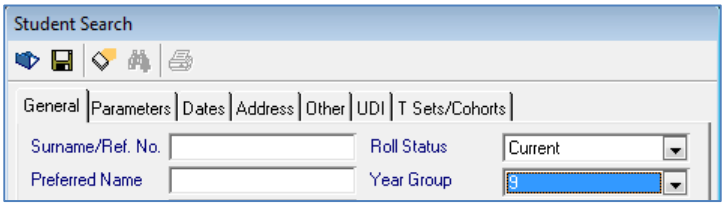
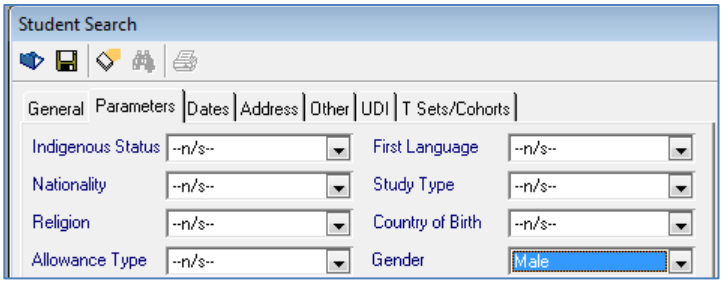


- Click Advanced Find to search for the additional students to add to the query
- Click Add Students to find for the Year 9 boys



- Select the Parameters tab and Gender – Male



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

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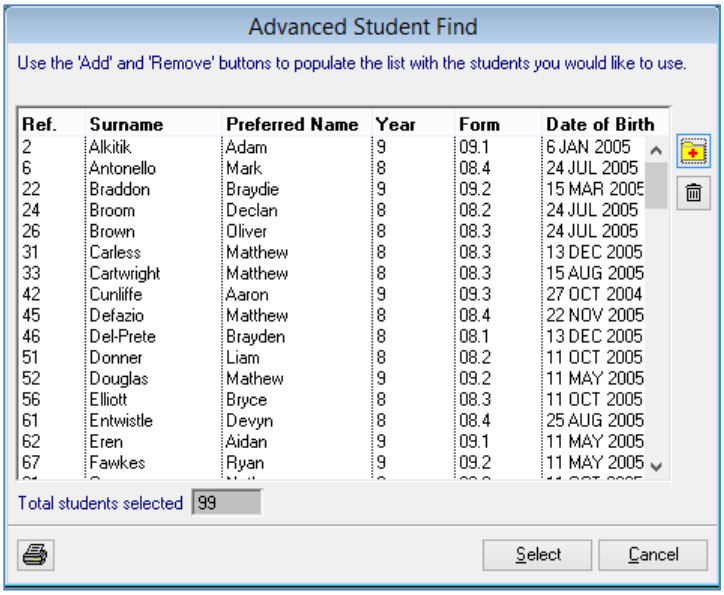
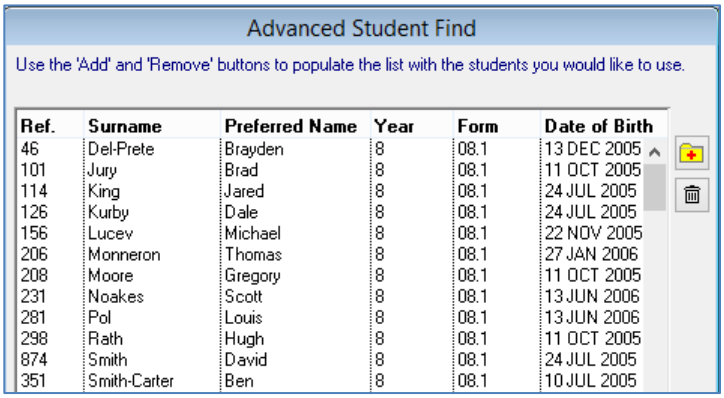


- Click on the ***Form*** column header to sort into Forms



- 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.

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7.2 Entering and Maintaining Student Records

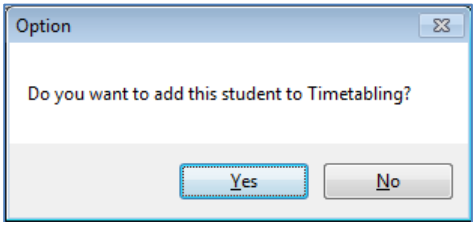
General > Student Details

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.

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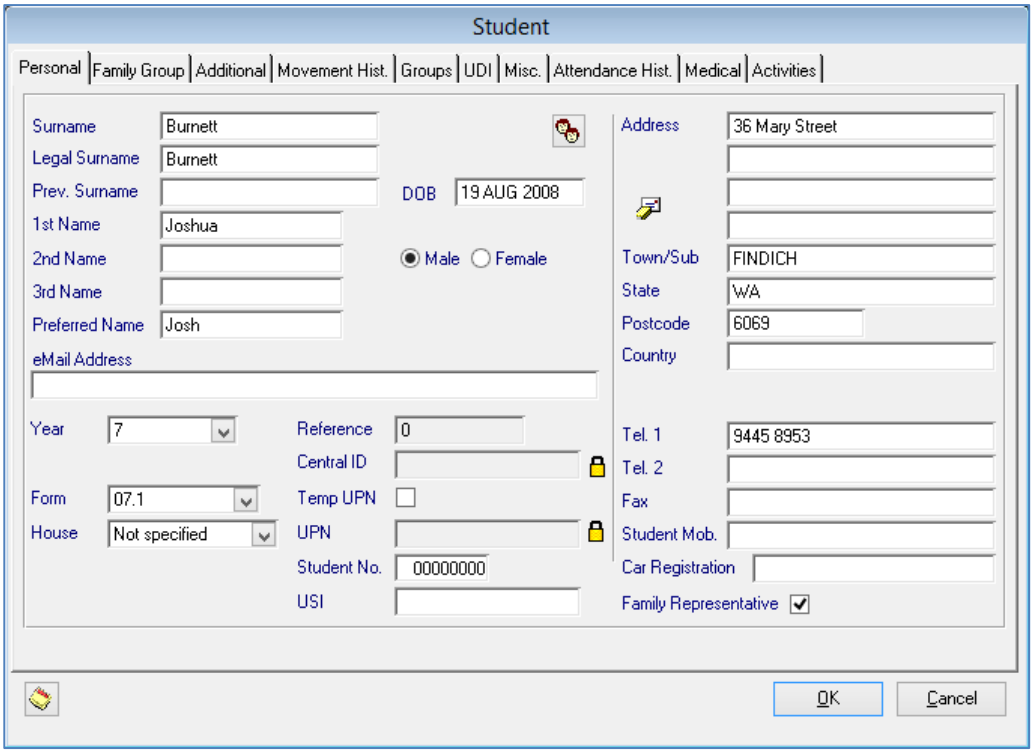
Activity

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

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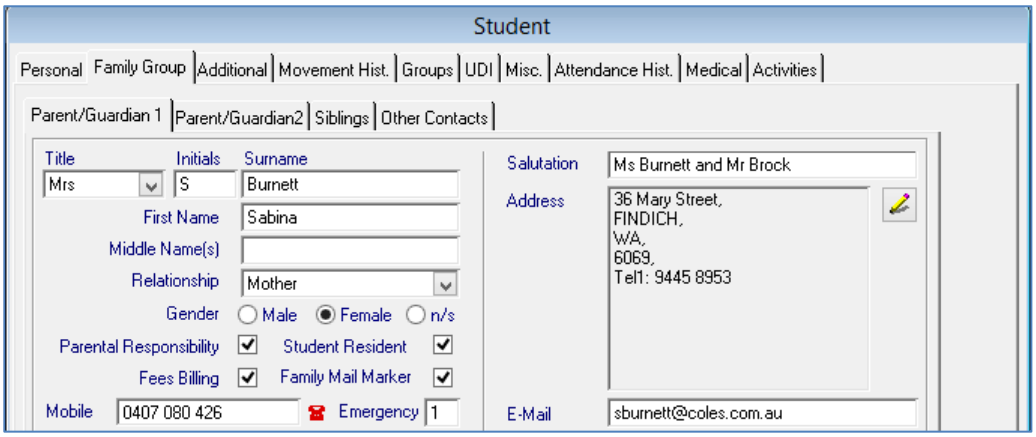
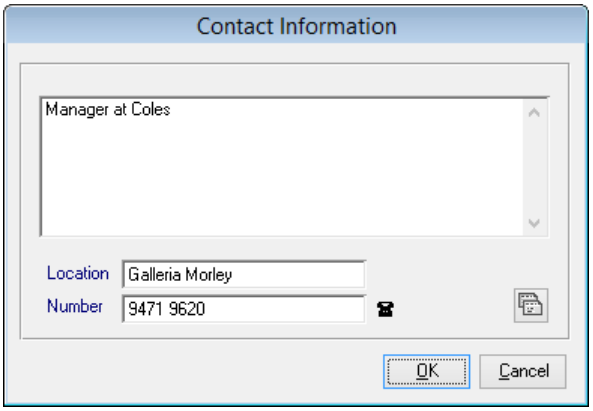
Family Group Tab

- 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.



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



- Click ***OK***

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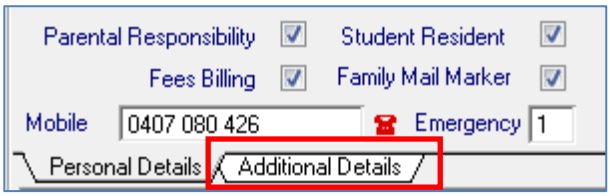
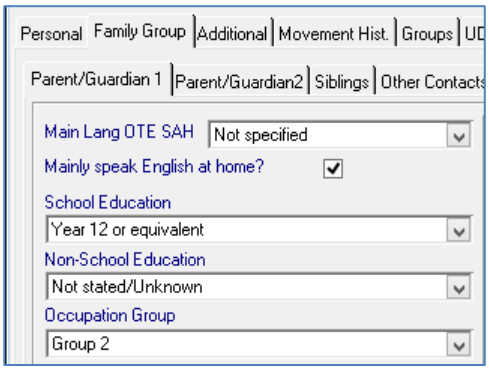
- Click the ***Additional Details***

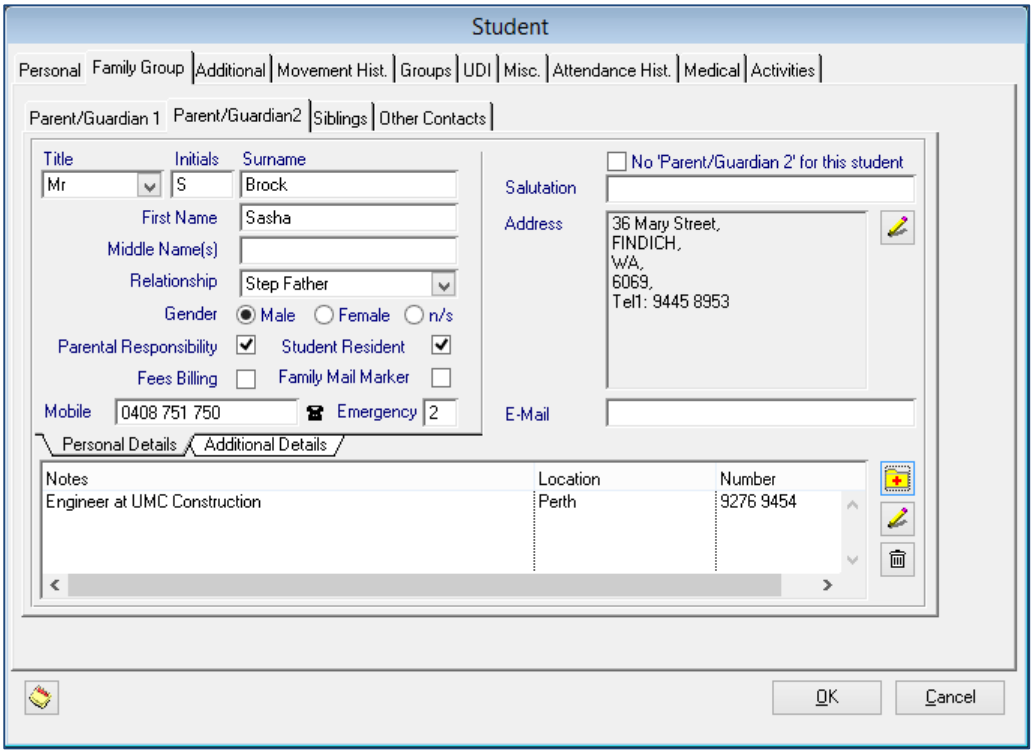


- Tab to enter MCCETYA (parents background information) for ***Parent/Guardian 1***



Parent Guardian 2

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



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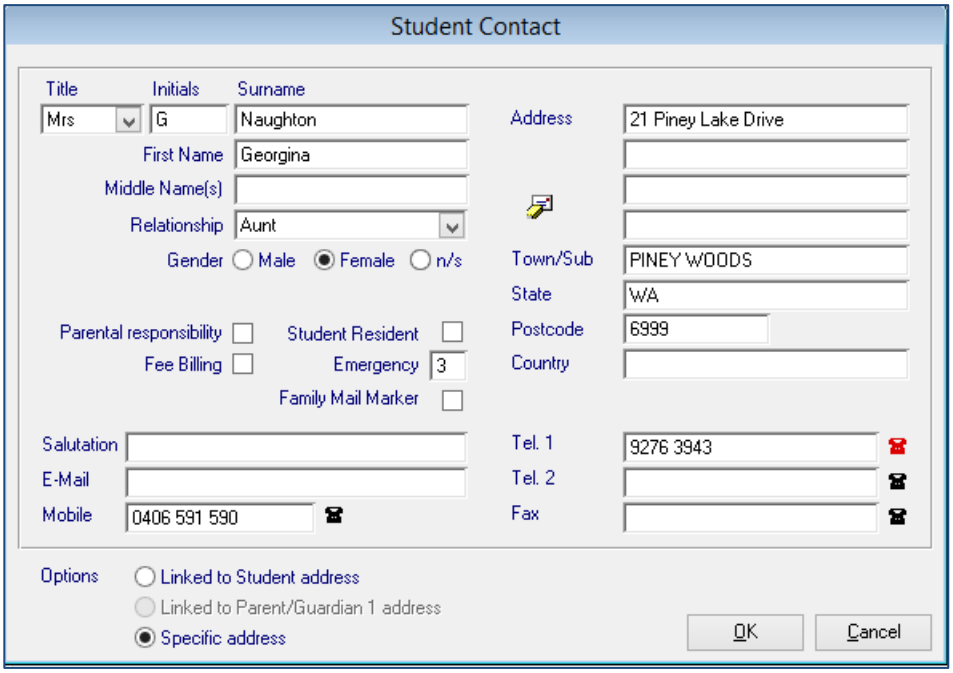
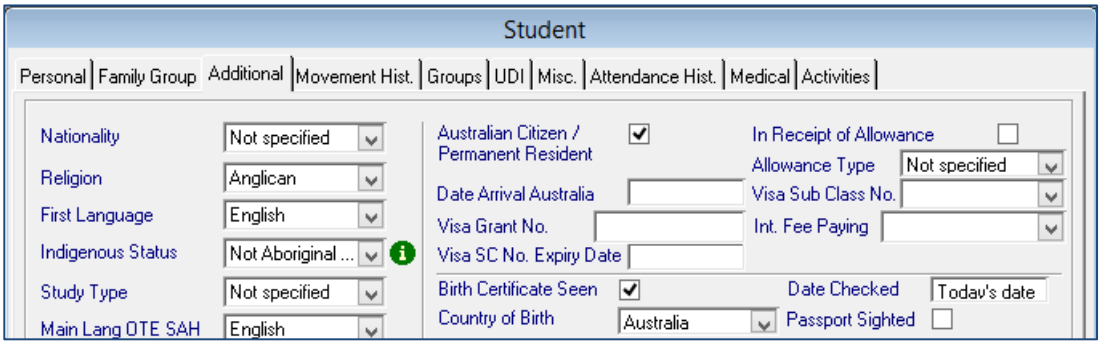
Other Contacts

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



Additional Information

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



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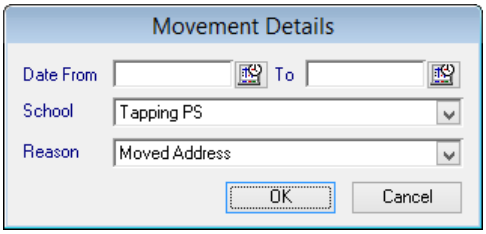
Movement History

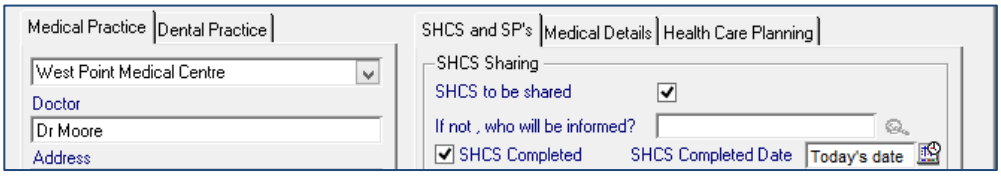
- Select the ***Movement History*** tab and click Add
- Enter the ***To*** date as last Friday
- Enter the previous ***School*** and ***Reason***



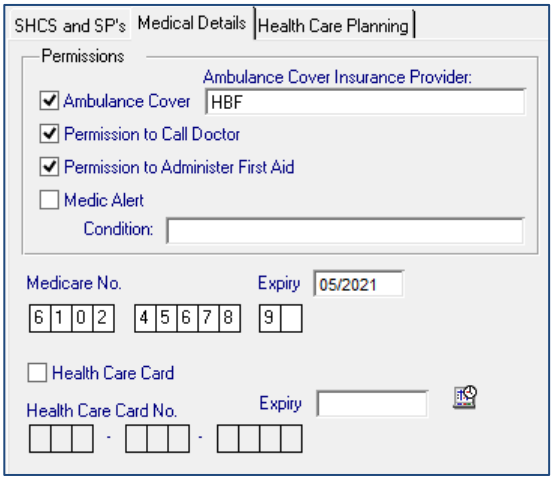
- Click ***OK***

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



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



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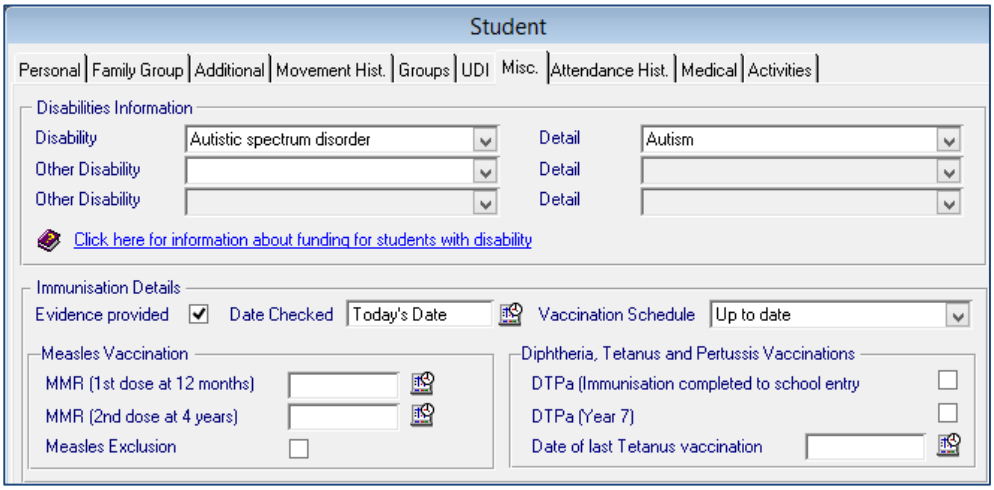
Miscellaneous Details

- 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



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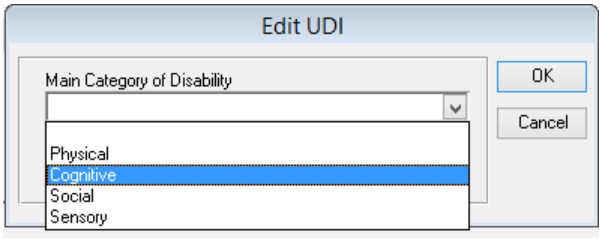
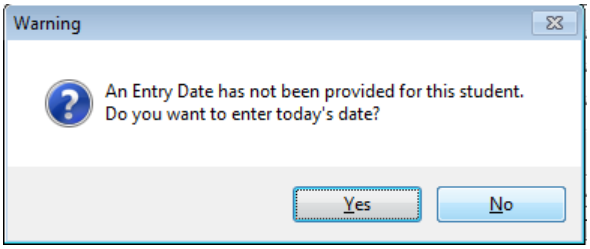
UDI Details

- 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



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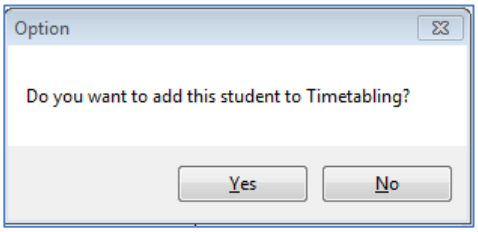
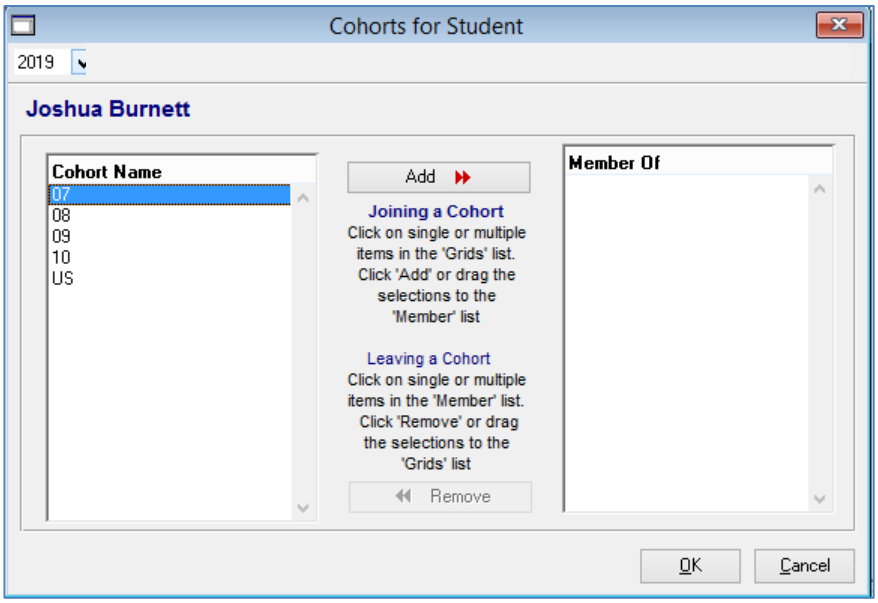
- Click **Yes** to an entry date of today



- 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

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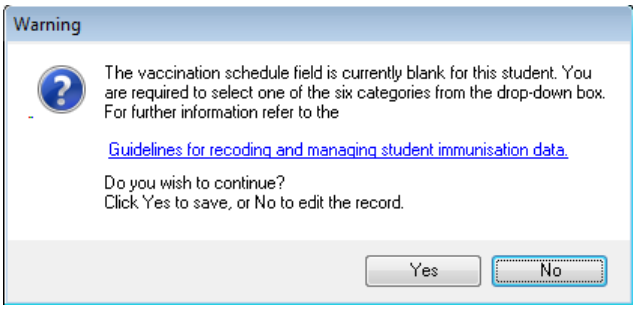
7.2.2 Immunisation Notes

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 with take you to the DoE website to the ***Guidelines for Recording and Managing Student Immunisation Data*** document.

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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.

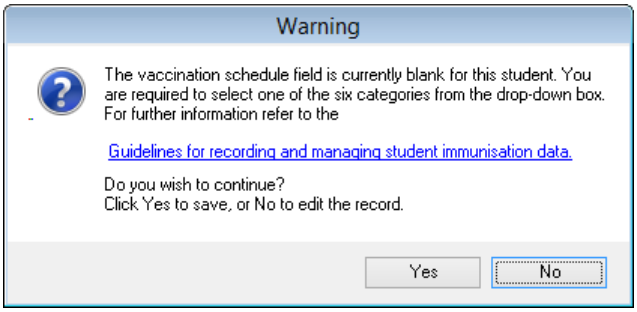
Refer to Administration Manager – Supplement for the enrolment information.

General > Student Details

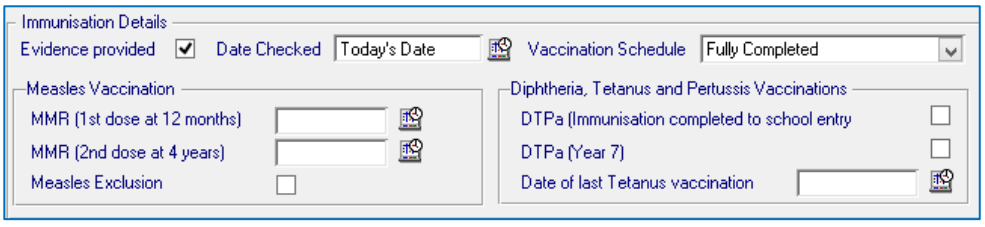
- Click Add Student
- Type ***Allen*** and press ***<Tab>***
- Highlight both ***Tamara*** and ***Penelope Allen***
- Click ***OK***
- Click ***Copy Data***

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



- 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**

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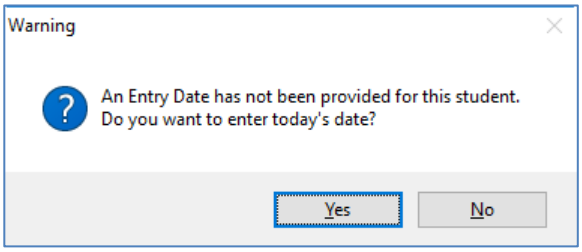
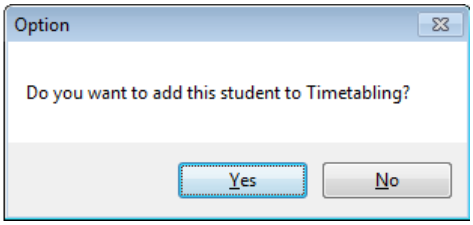
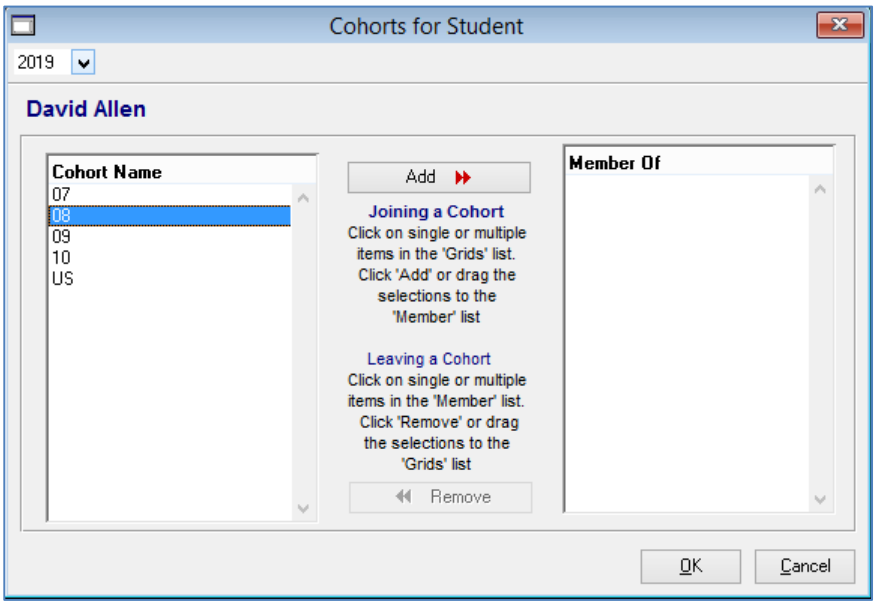
- Click Yes to the Entry Date message



- Click ***Yes*** to the Timetable message



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



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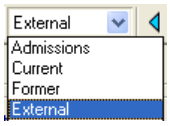
7.2.4 Adding a Student to the External Roll

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***

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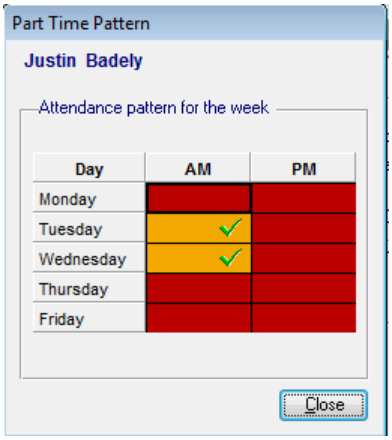
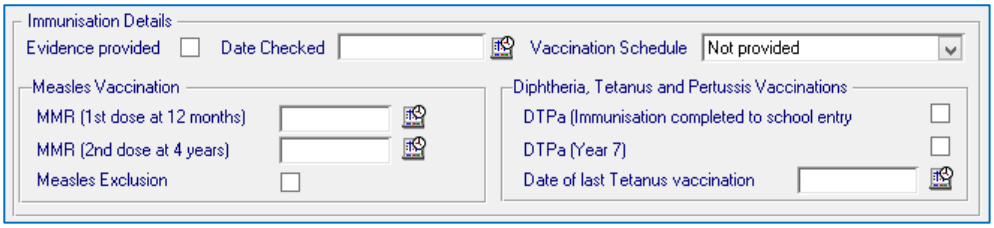
- On the ***Additiona***l tab, check ***Australian Citizen/Permanent Resident***
- Set the ***FTE*** to ***0.20***
- Select ***Custom***

- Click Assign Part Time Pattern

- Set ***Tuesday*** and ***Wednesday*** mornings as the Attendance pattern



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



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

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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.

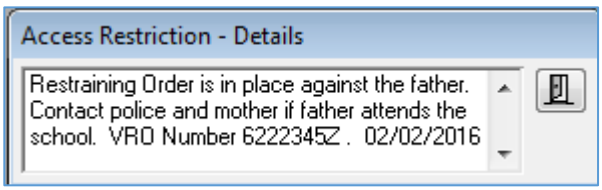
Activity

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



- 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.

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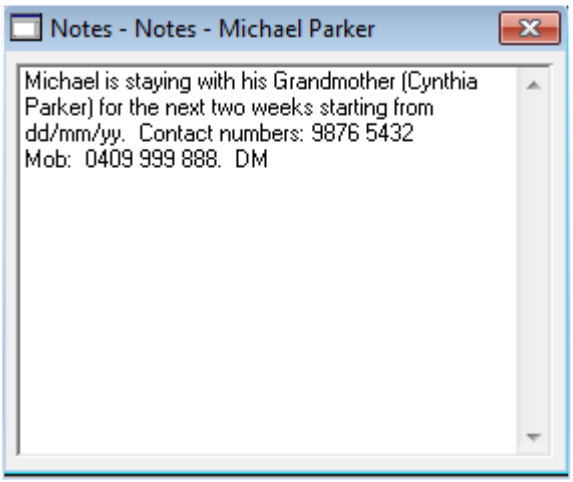
Adding a Student Note

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



- Close the note and click ***OK***

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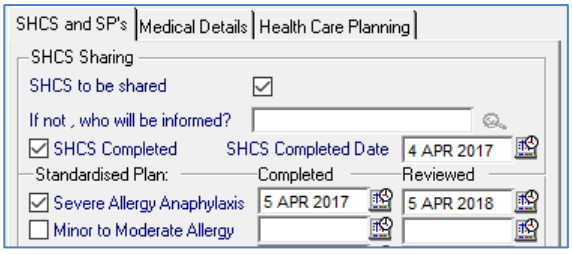
7.3 Medical Records

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.

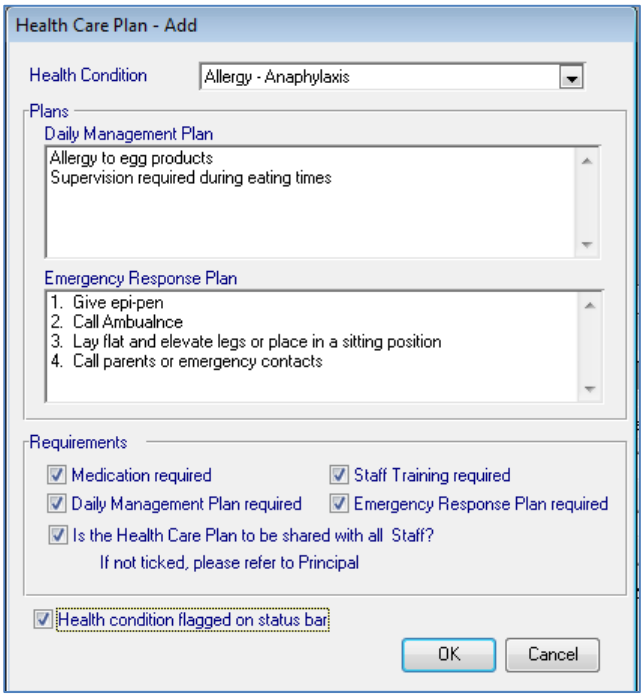
7.3.1 Entering and Maintaining Student Health Care Information

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***



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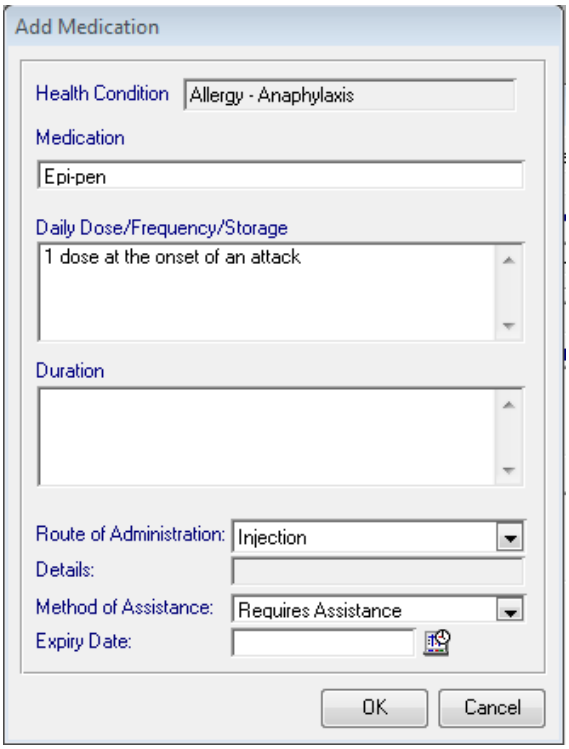
Note: Health Care Forms are located on the Department of Education website. They can be downloaded in either ".kst" or MSWord formats. To access or download the forms, follow the link below. Some Emergency Response Plans can be copied and pasted from these forms.

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

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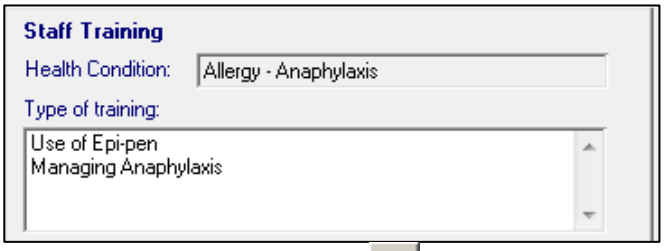
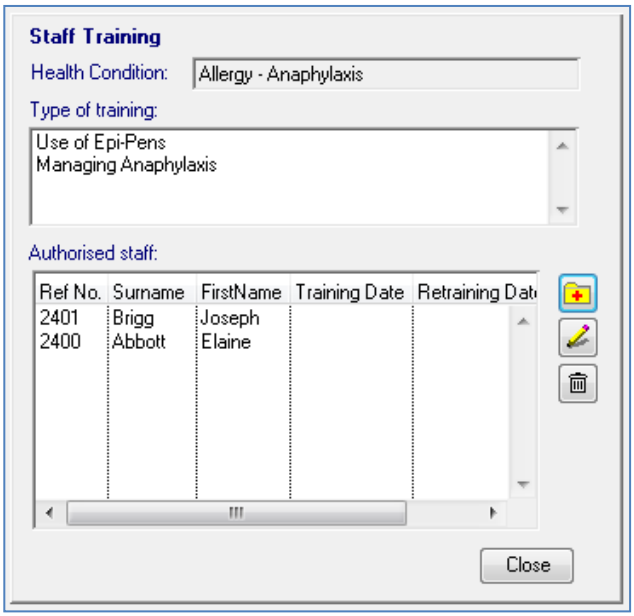
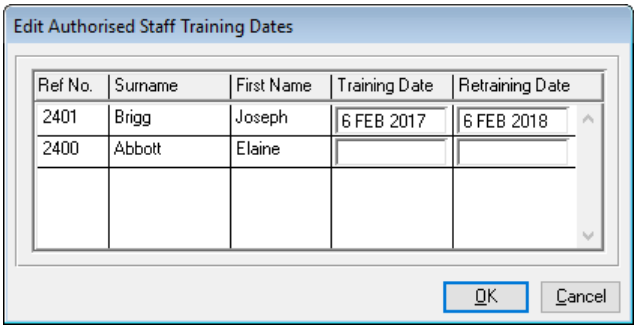
- Enter the ***Type of training*** information



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



- Highlight one of the staff members and click on edit



- 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

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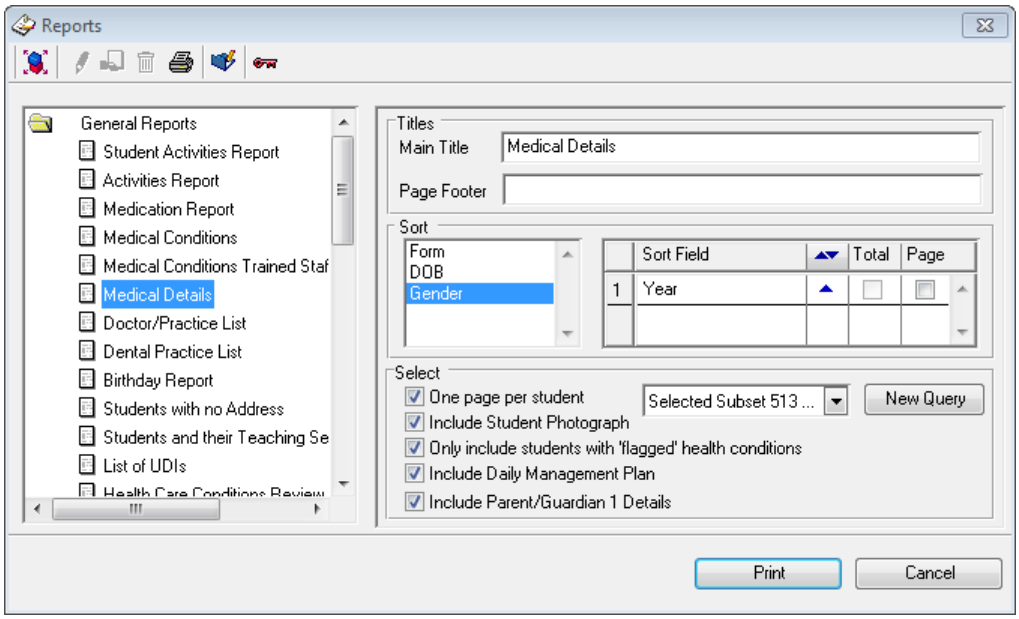
7.3.2 Medical Reports

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



- 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.

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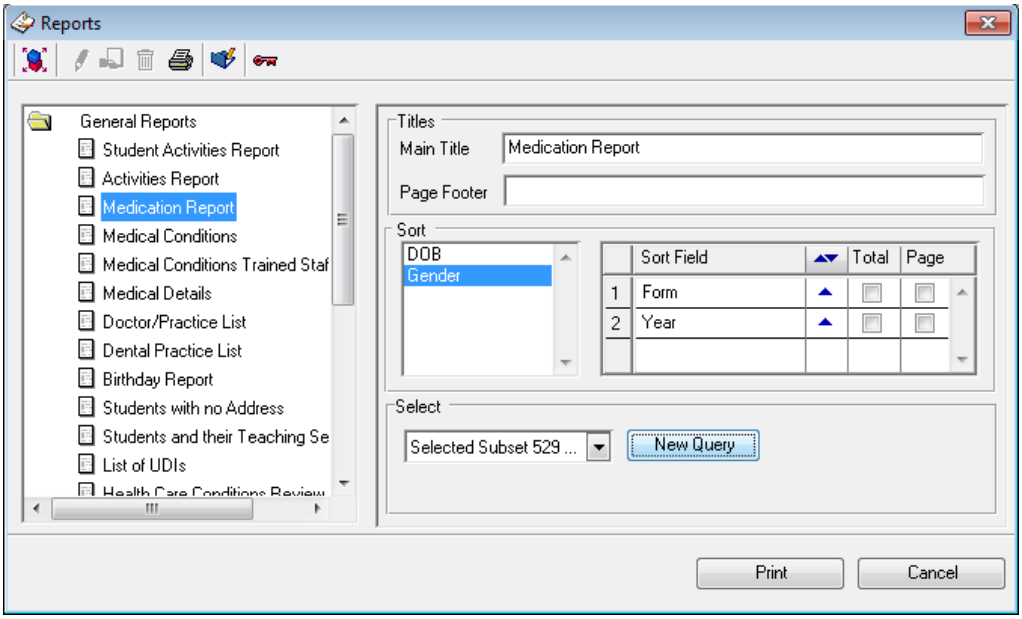
Activity

Admin > Reports > General Reports > Medication Report

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



- Click ***Print***

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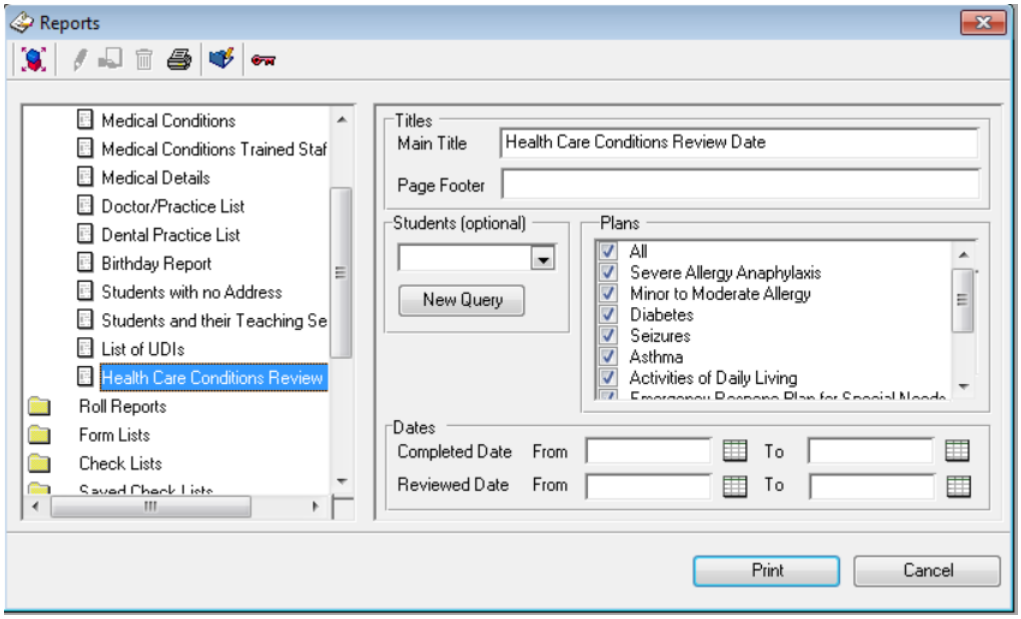
Activity

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

- Select Plans ***ALL***.



- 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

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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.

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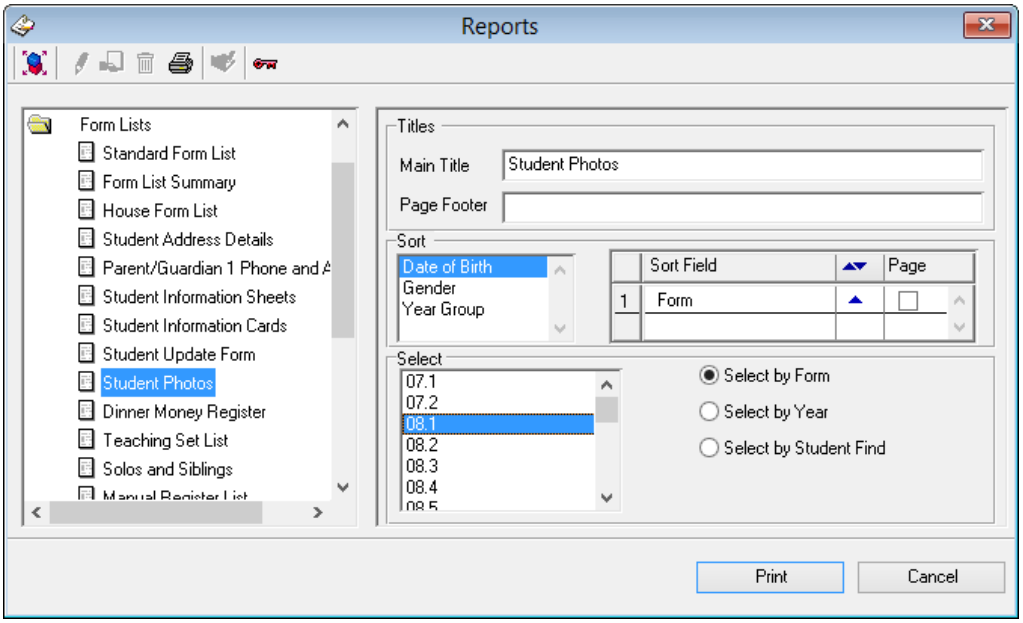
7.4.2 Student Photo Report

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***



- Click ***Print***

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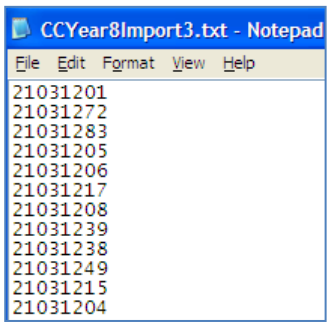
7.5 School Curriculum and Standards Authority (SCSA) Student Numbers

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.

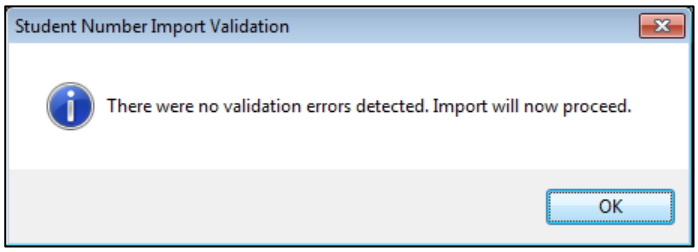
7.5.1 Student Numbers - Validation Information

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.

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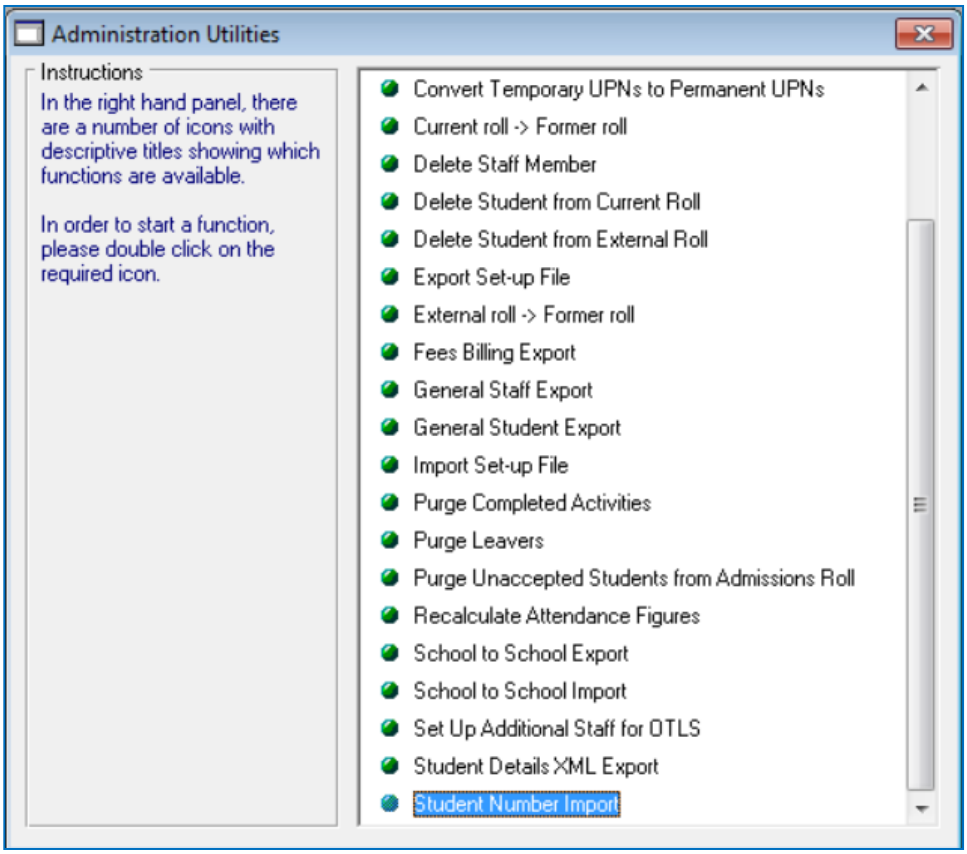
7.5.2 Student Number Import

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

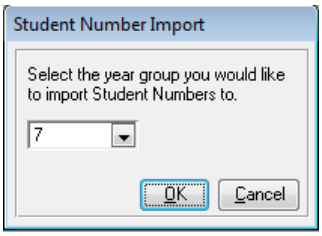
Activity

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**

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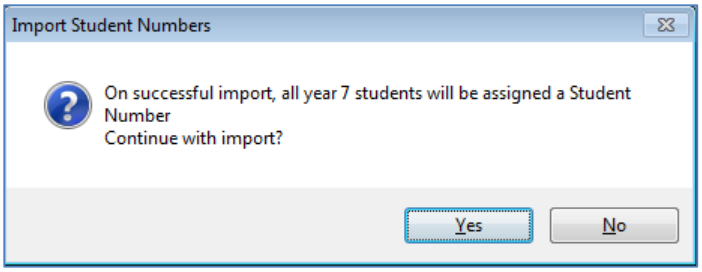
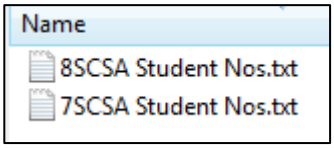
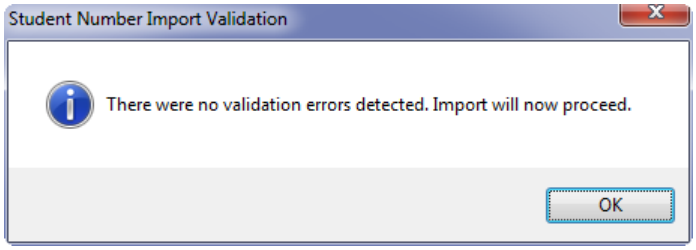
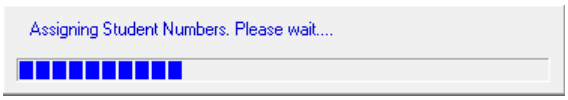


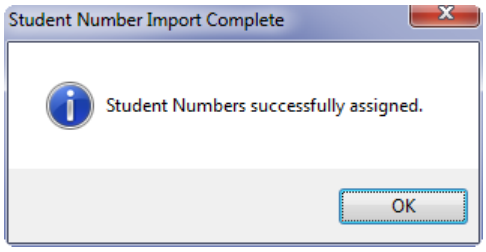
- Click Yes
- Navigate to **C:/keys/Integris/Inbox/StudentNos**
- Highlight the **7CCNos** text file and click ***Open***



- 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

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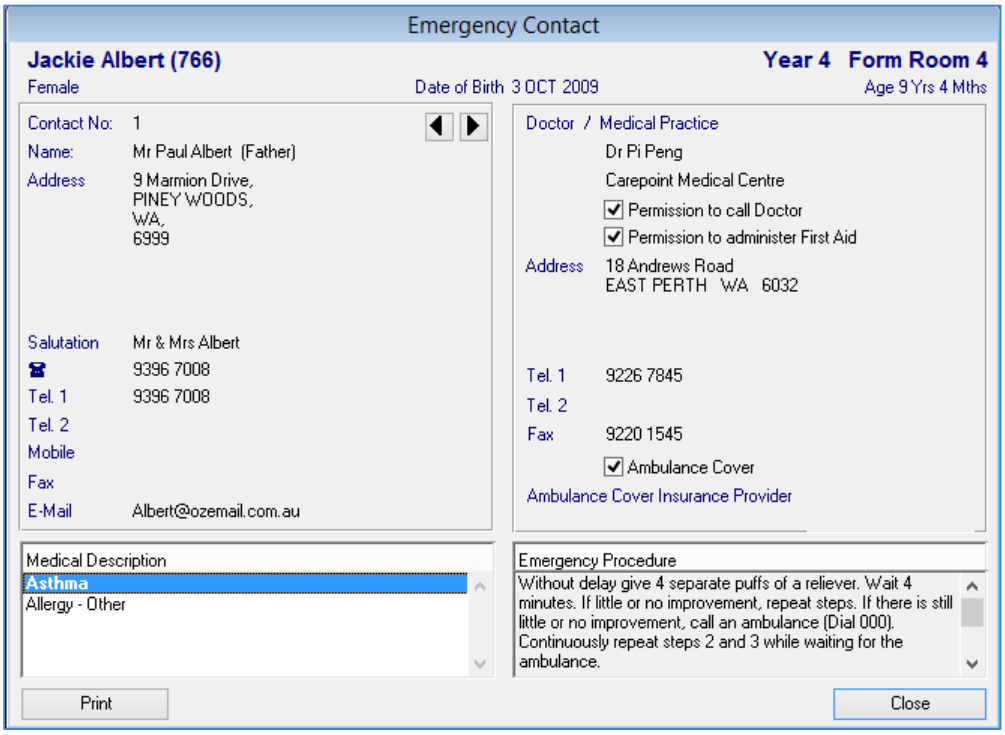
7.6 Student Emergency Contact

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.



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

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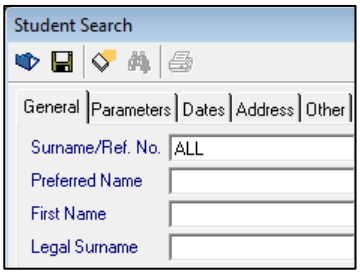
7.6.1 Viewing and Printing Emergency Contact Information

Activity

Print emergency details for Penelope Allen

- Click Student Emergency Contact

- Enter ***ALL*** in the ***Surname/Ref. No.*** field and click ***Find***



- 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

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8 The Admissions Roll

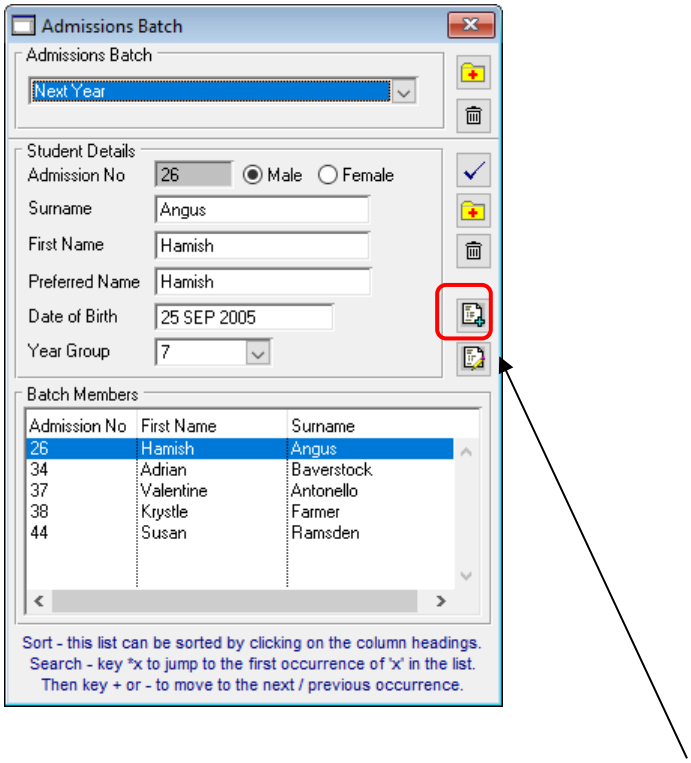
During the course of the year, it will be necessary to enter details for students who may be admitted to your school at any time in the future. These students are entered on the **Admissions Roll.** This can be done in one of three ways.

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.

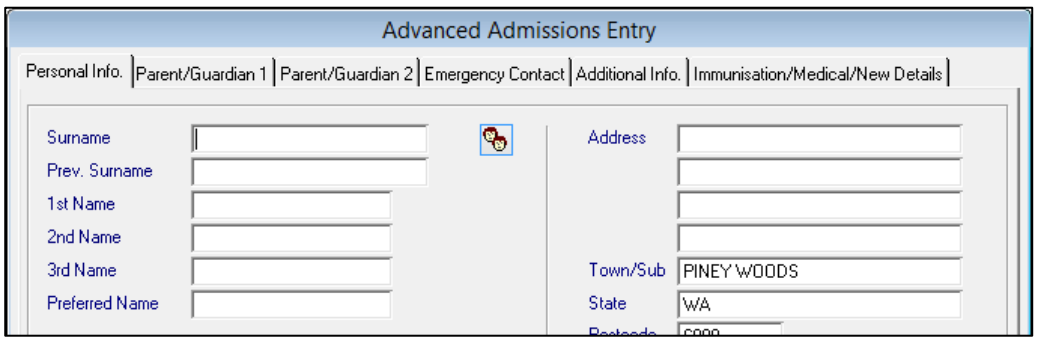
Entering Minimal Data via the Admissions Batch System

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.



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.



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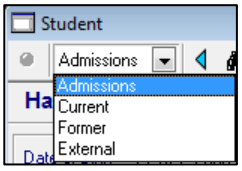
8.1 Admissions Roll

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

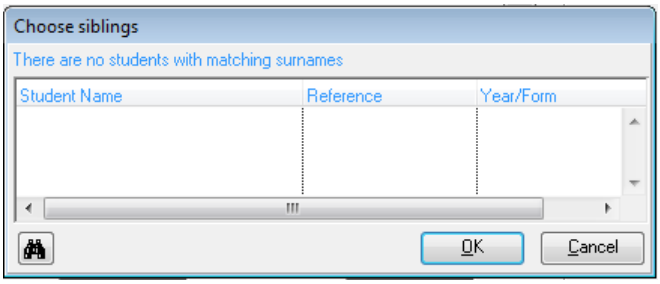
General > Student Details

- 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***

- Copy Helen Baverstock's details using

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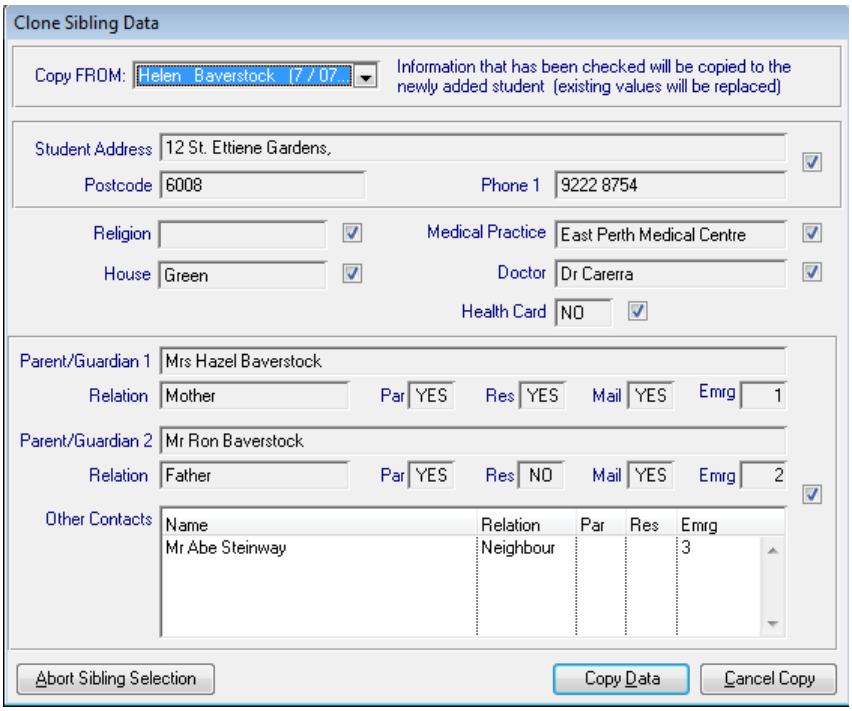
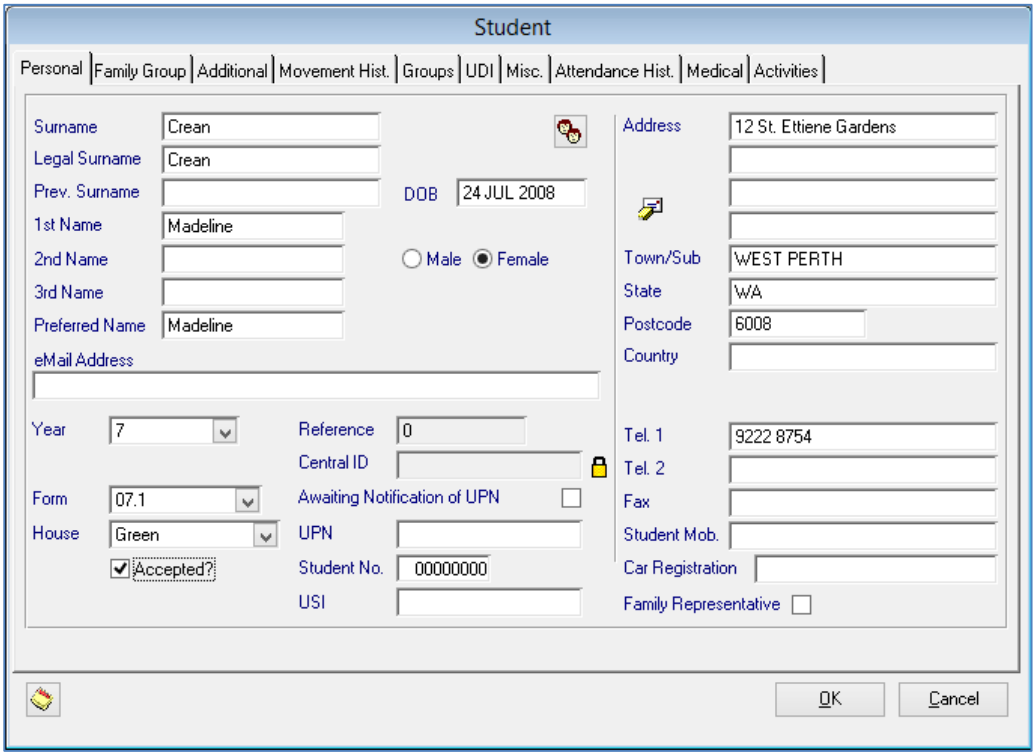


- Enter her **First Name**
- Enter her **Date of Birth** and **Gender**
- Enter her **Year**
- Click **OK** to move her from one Lesson Attendance Period Structure to another
- Enter her **Form Room as 07.1**
- Tick the **Accepted box**



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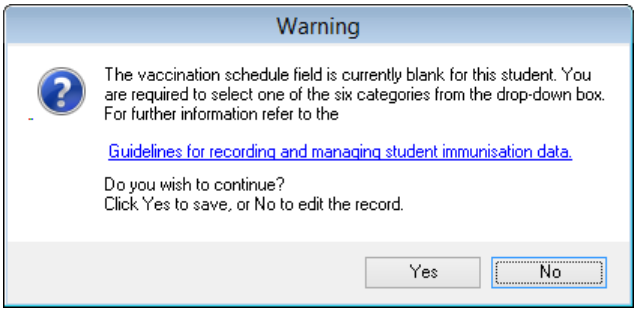
- Click the ***Additional*** tab, check ***Australian Citizen/Permanent Resident***

- Click ***OK***

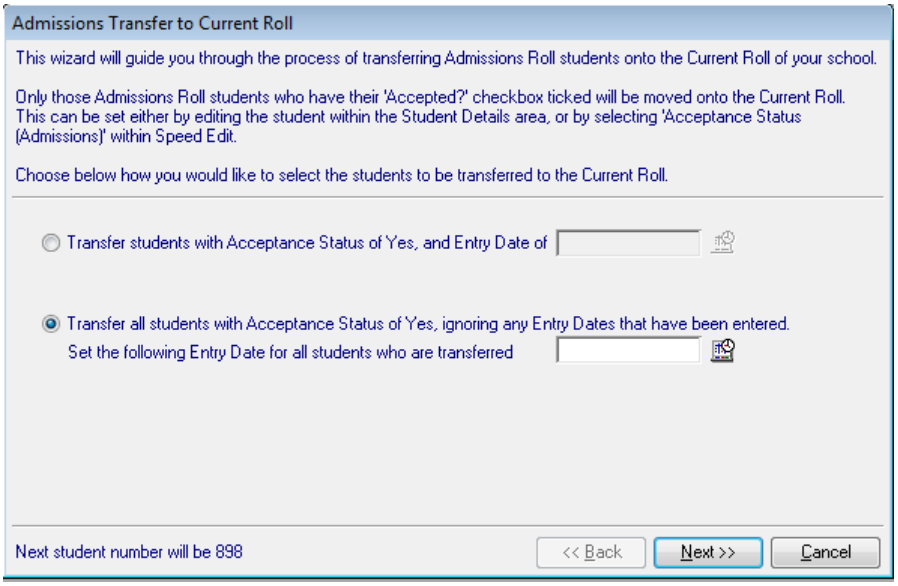


- Click ***Yes*** to Save without entering the Vaccination Schedule

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.

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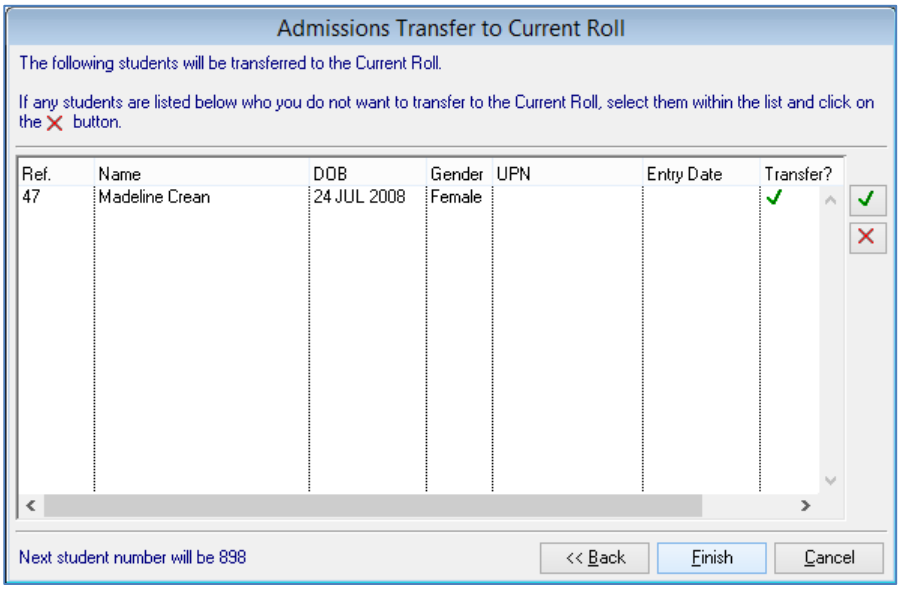
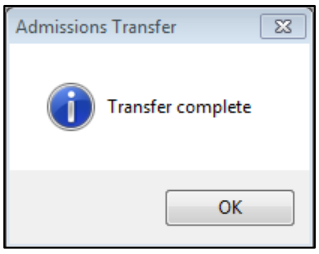
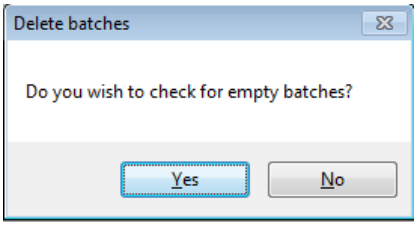


- Click ***Finish***



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



- 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.

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9 The Former Roll

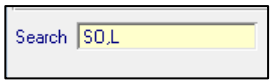
Students may be moved from the Current to the Former roll individually or in groups.

9.1 Moving an Individual Student to the Former Roll

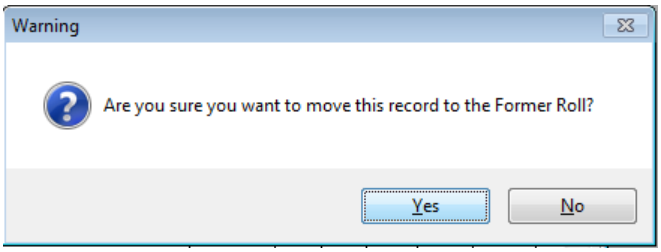
Activity

Linda So is leaving the school today.

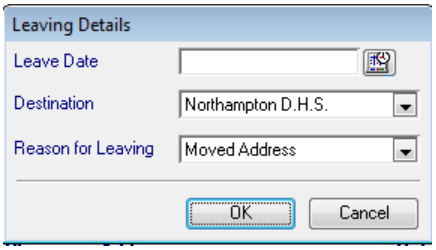
General > Student Details

- Use ***Search*** to find Linda So 

- Click on Move Student to Former Roll



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



- Click ***OK***

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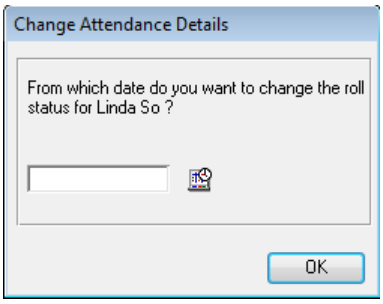
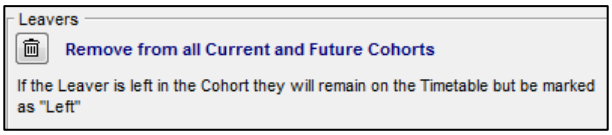
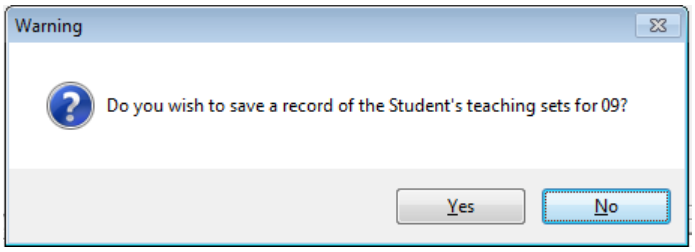
- Select TODAY'S date for changes to the roll status



- 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.

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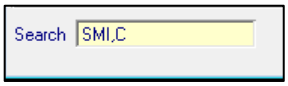
9.2 Moving Groups of Students to the Former Roll

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

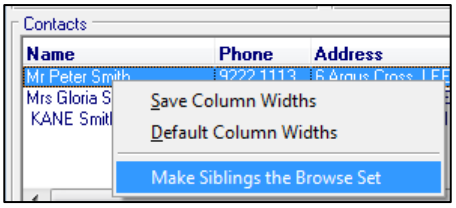
Cameron and Kane Smith are moving to Jurien DHS. Move them to the Former Roll.

General > Student Details

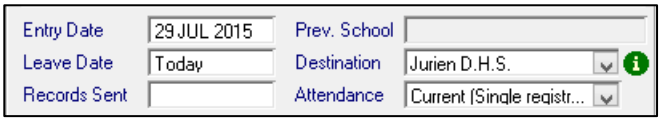
- Use ***Search*** 

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***



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

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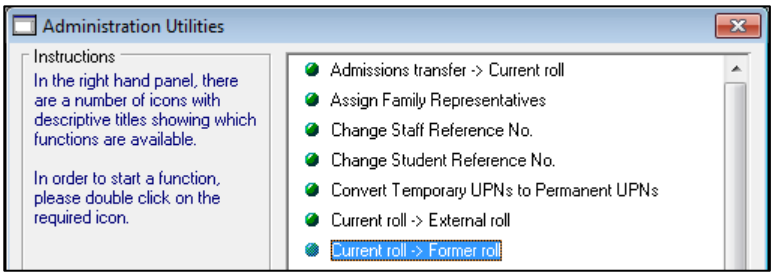
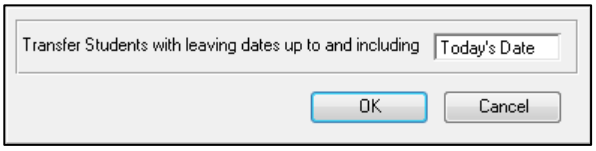
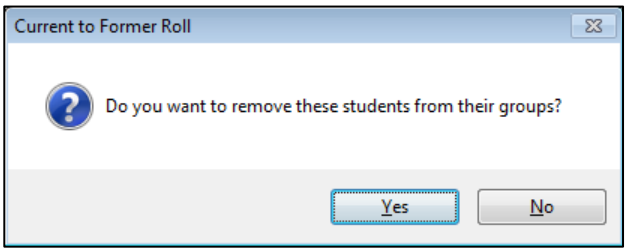
Admin > Utilities



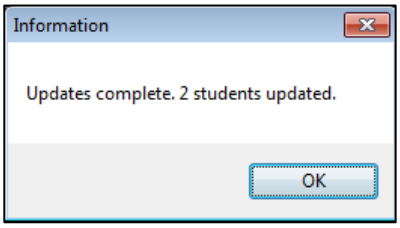
- Double-click ***Current Roll → Former Roll***



- 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.

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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.

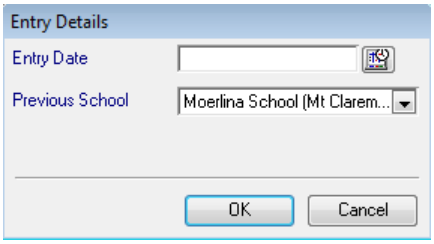
If you wish to reinstate a student who has been transferred to the Former Roll, you can do this by clicking Reinstate Student to Current Roll.

Activity

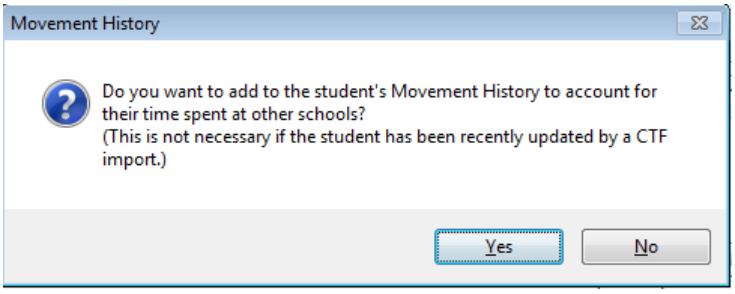
General > Student Details > Former Roll

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 Reinstate 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

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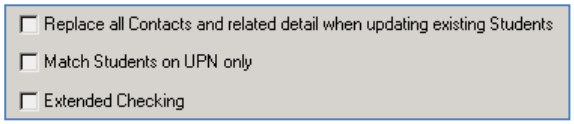
10 Exporting and Importing Student Data

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 – 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.

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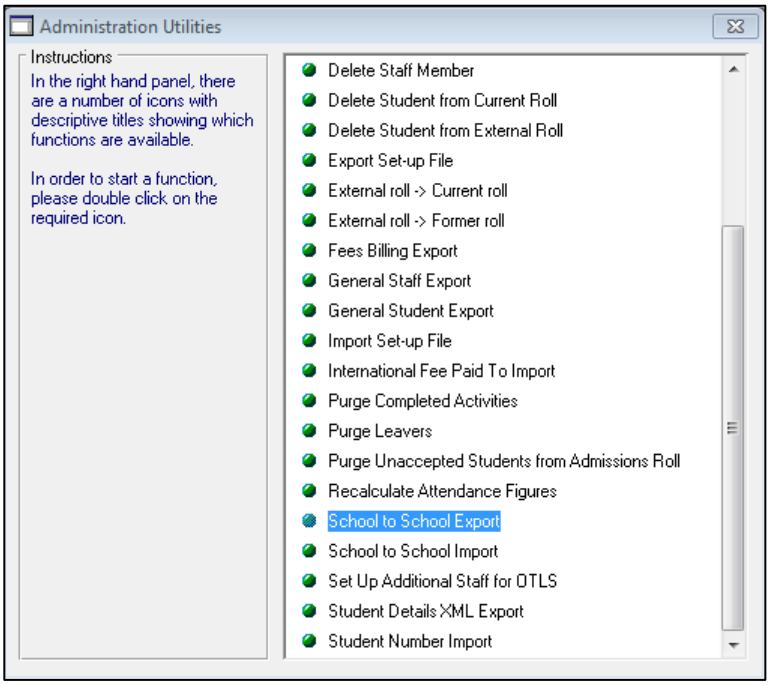
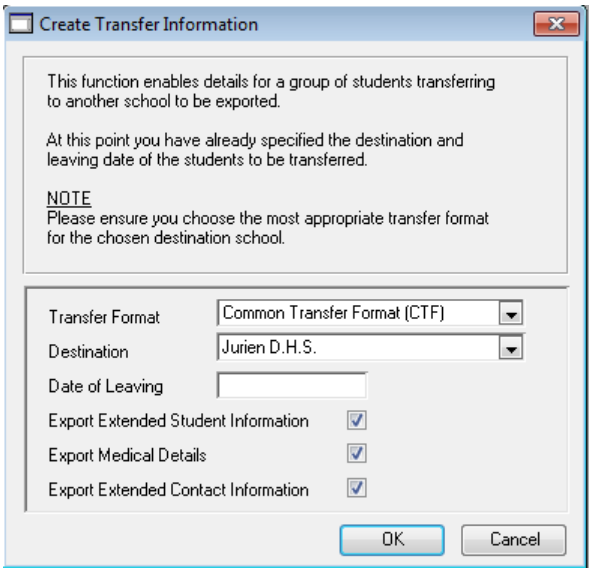
10.1 Exporting Student Data

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***

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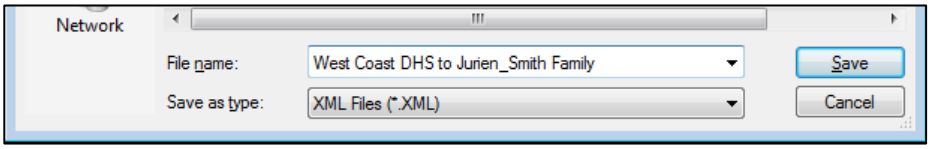
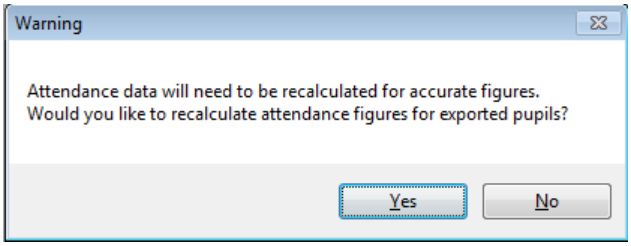
- Give the export file a name, for example ***West Coast DHS to Jurien DHS_Smith family***

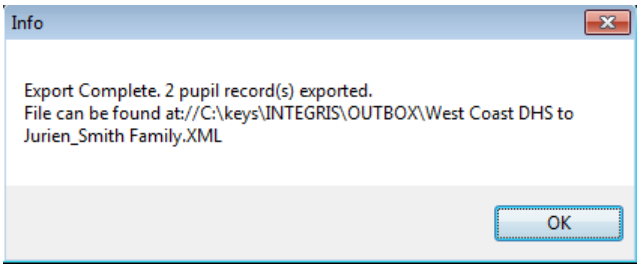


- Click ***Save***

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***

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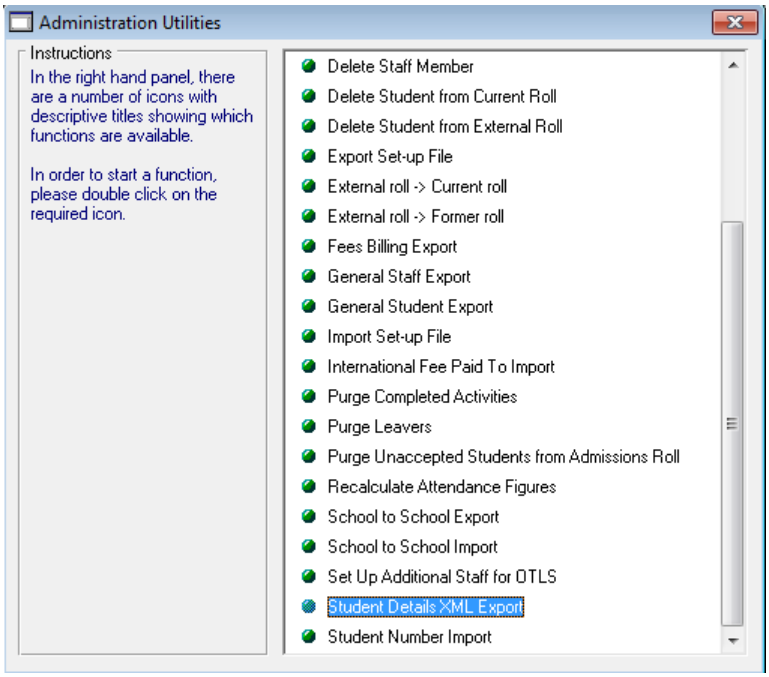
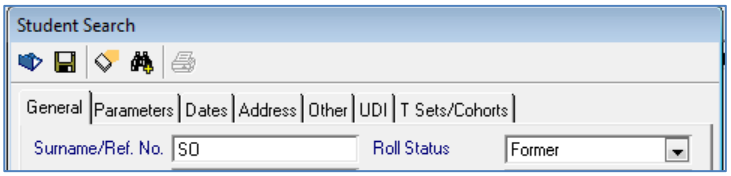
Admin > Utilities > Student Details XML Export

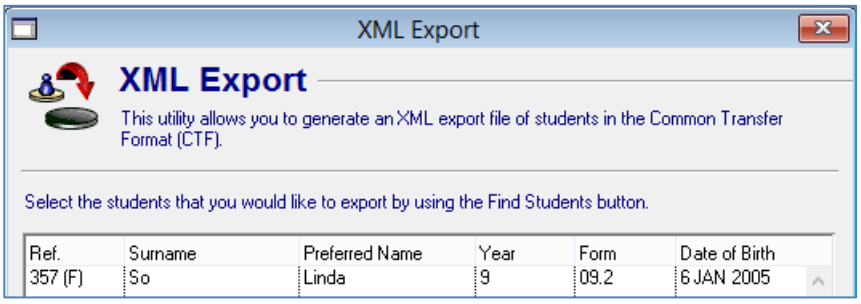


- Click

Enter the following information to locate Linda So



- Click ***Find***



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

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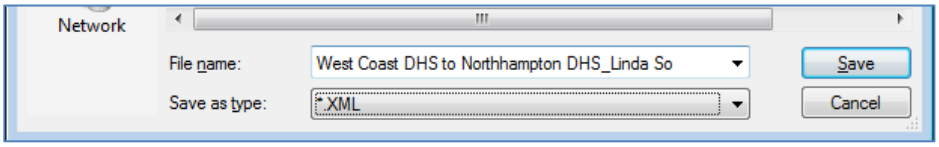
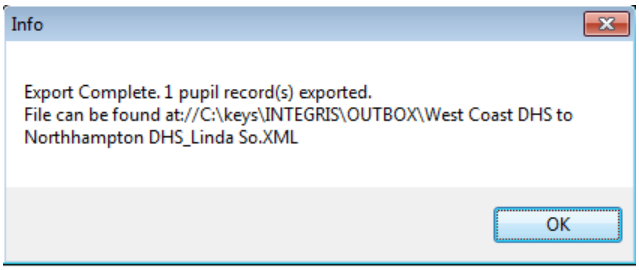
- Choose the Partial Export option

- 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***

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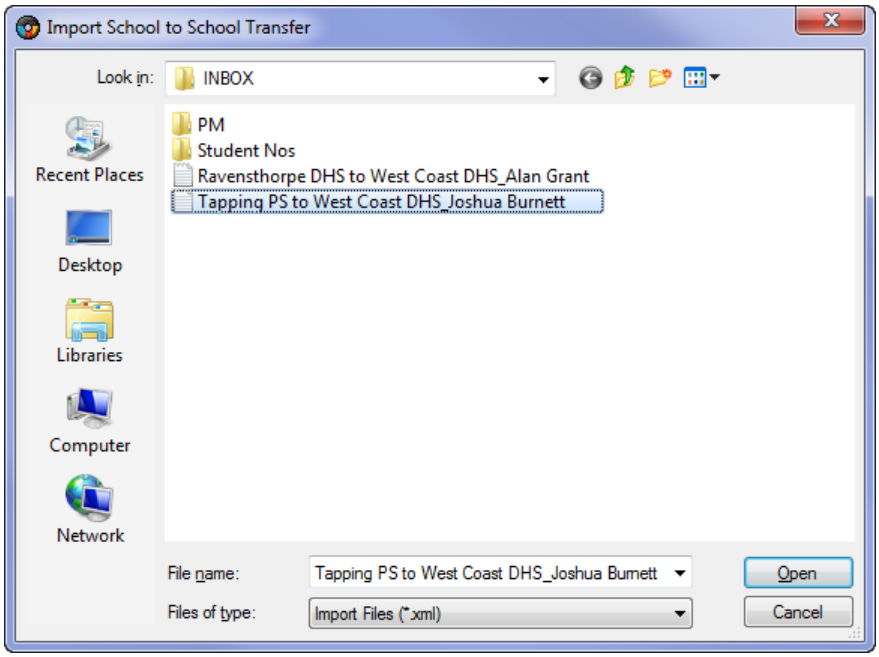
10.2 Importing Student Data

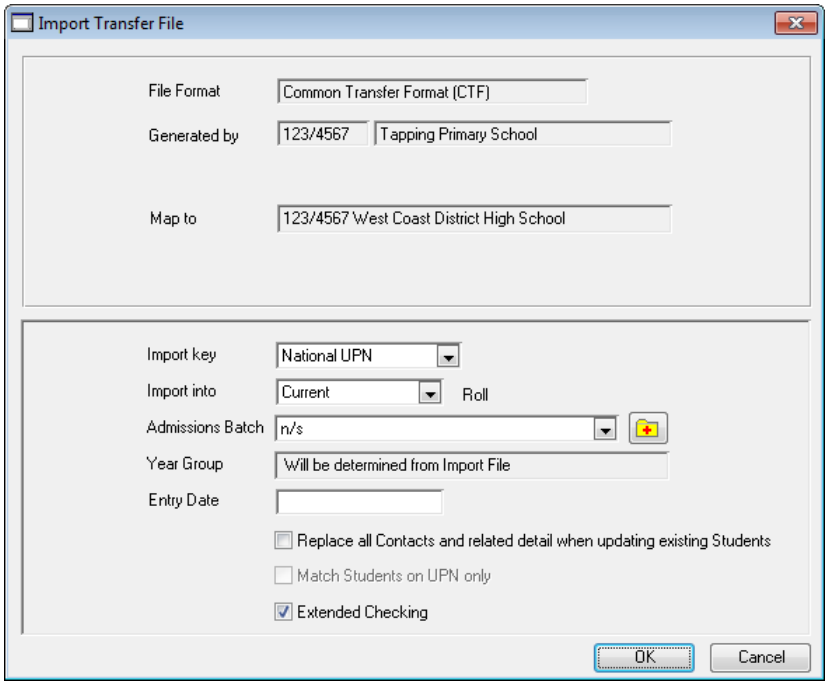
10.2.1 Importing Student Data to the Current Roll

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)



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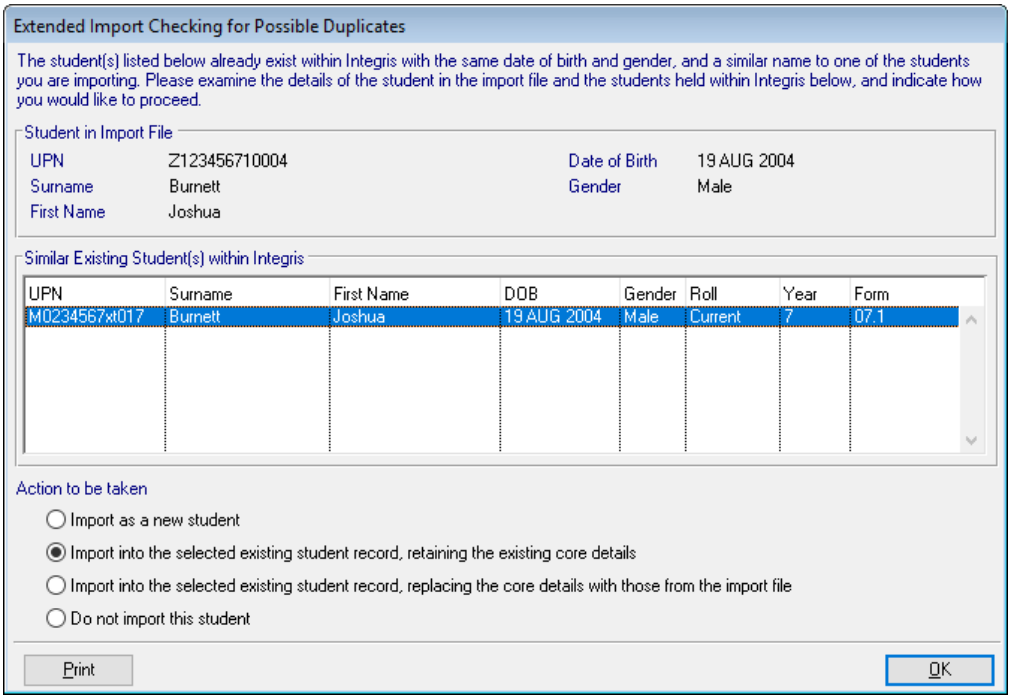
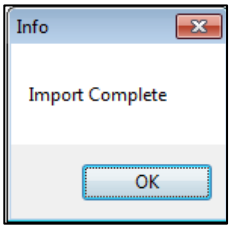
- Check **Extended Checking** (this ensures that possible duplicate records may be displayed)
- Click **OK**

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***



- Click **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.

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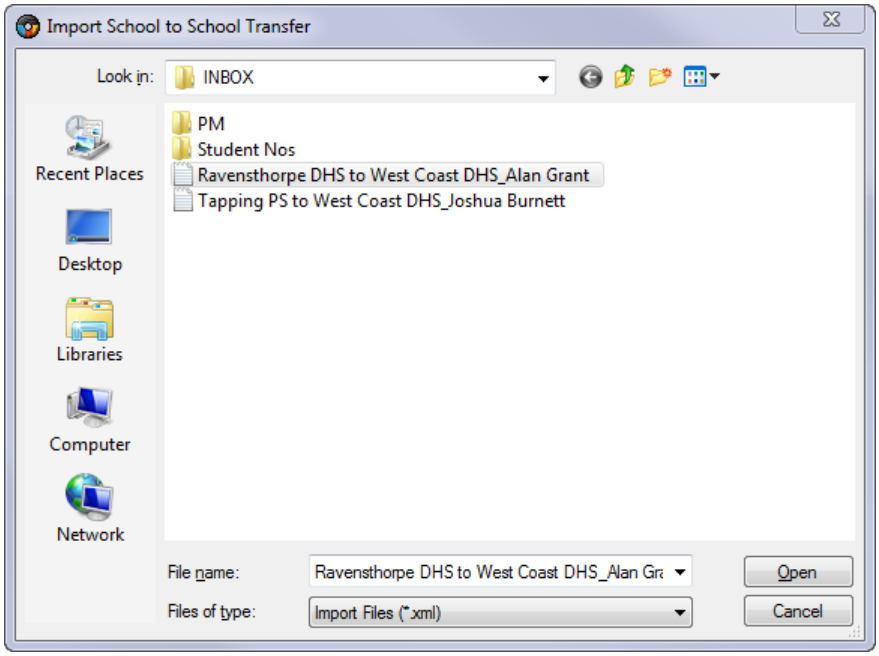
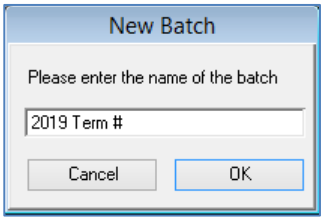
10.2.2 Importing to the Admissions Roll

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**

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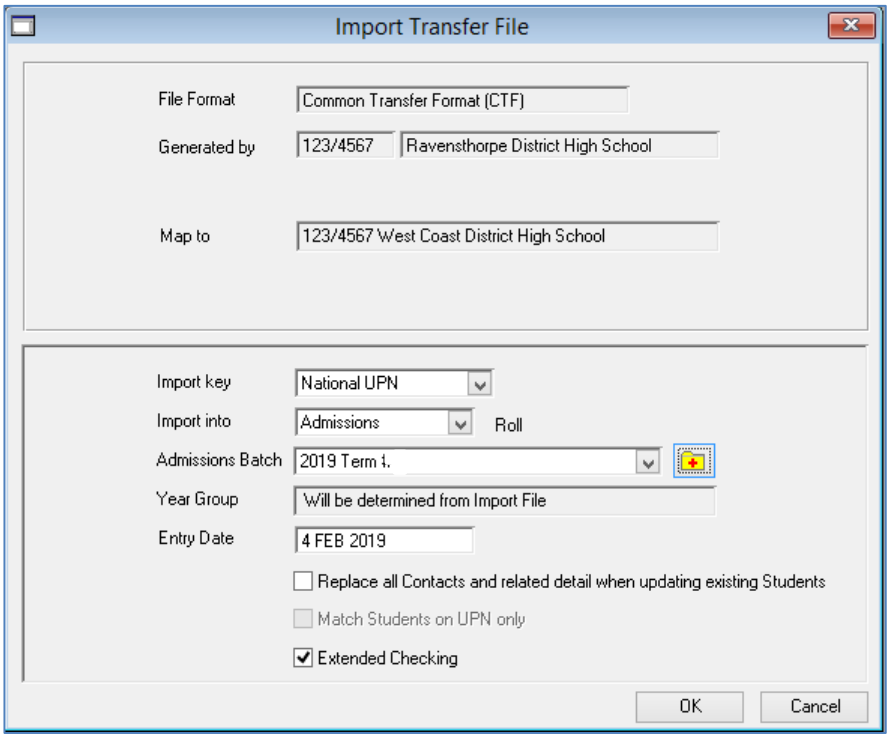
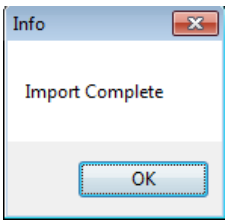
- Leave the ***Entry Date*** as TODAY
- ***Extended Checking*** option is ticked by default (Do not change)



- 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

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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**.

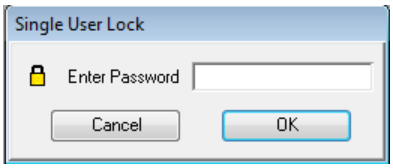
11.1 Creating a UDI

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

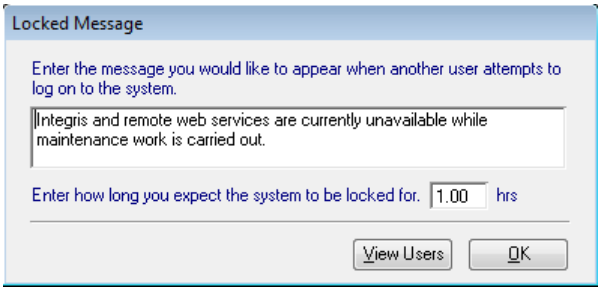
We wish to create a UDI field to record whether students have permission to use the internet at school.

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***

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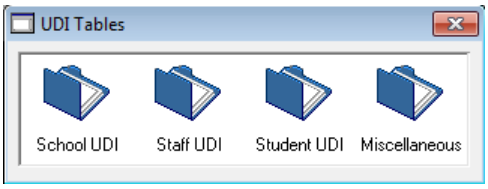
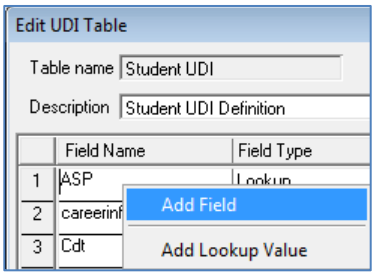
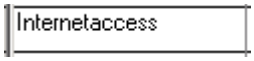
General > Control > UDI Definitions



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



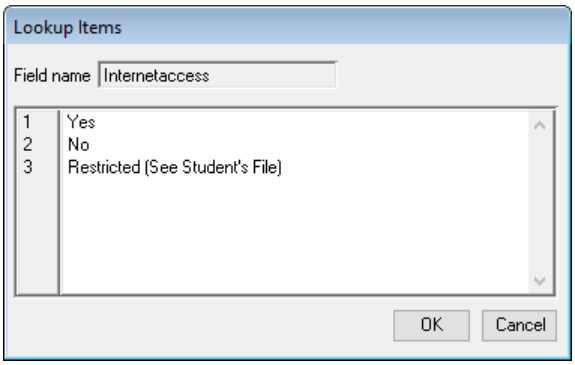
- Select ***Add Field***
- Enter the ***Field Name: Internetaccess***



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**

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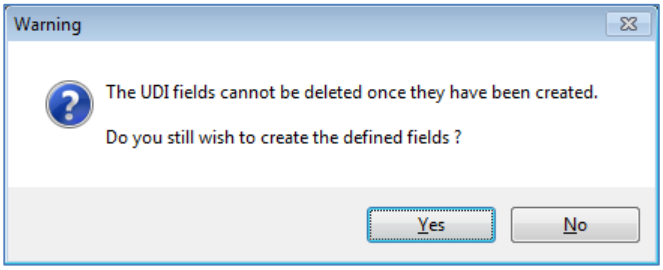
- Enter: ***Internet Access*** in the Description field
- Check the ***Index*** box

- Click ***OK***

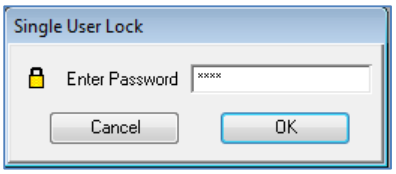


- Click ***Yes***

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**

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12 Speed Edit

Admin > Speed Edit

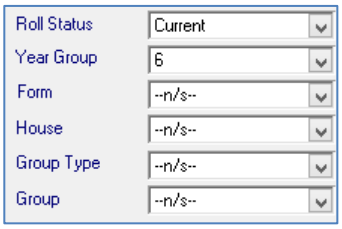
Speed Edit enables users to edit a number of student records at the same time in order to make the process faster. Speed Edit can be used to allocate House Factions, Current Forms, Acceptance Status, PG1 Fees Billers, Health cards and much more.

Activity

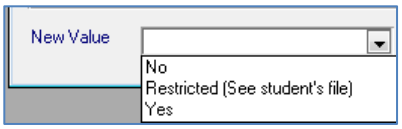
Speed edit the UDI *Internet Access* for all students in Year 6

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

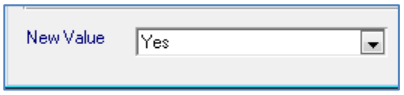
- Select ***Internet Access*** from the ***UDI Field*** menu
- Find and select the ***Year Group 6***



- 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***

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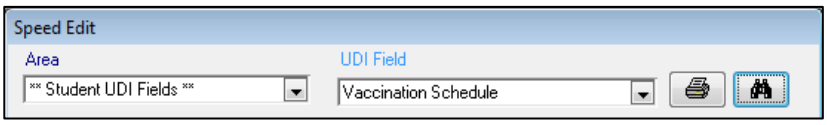
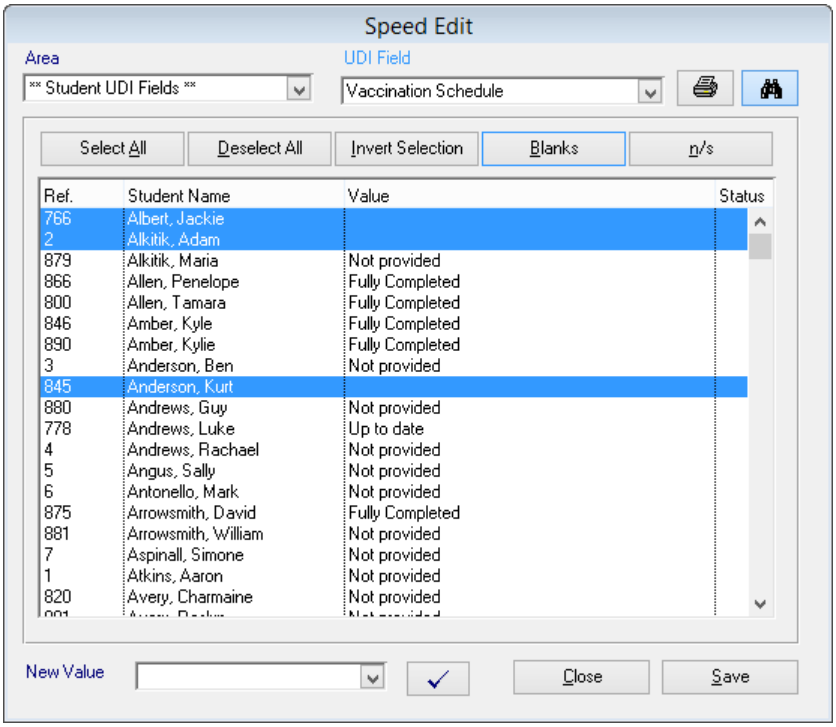
Some students have not provided their Vaccination Schedule to the school. Speed Edit may be used to flag those students who have not yet provided evidence of their Vaccination status.

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



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

tab



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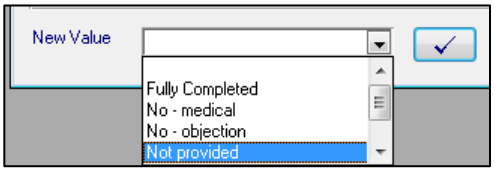
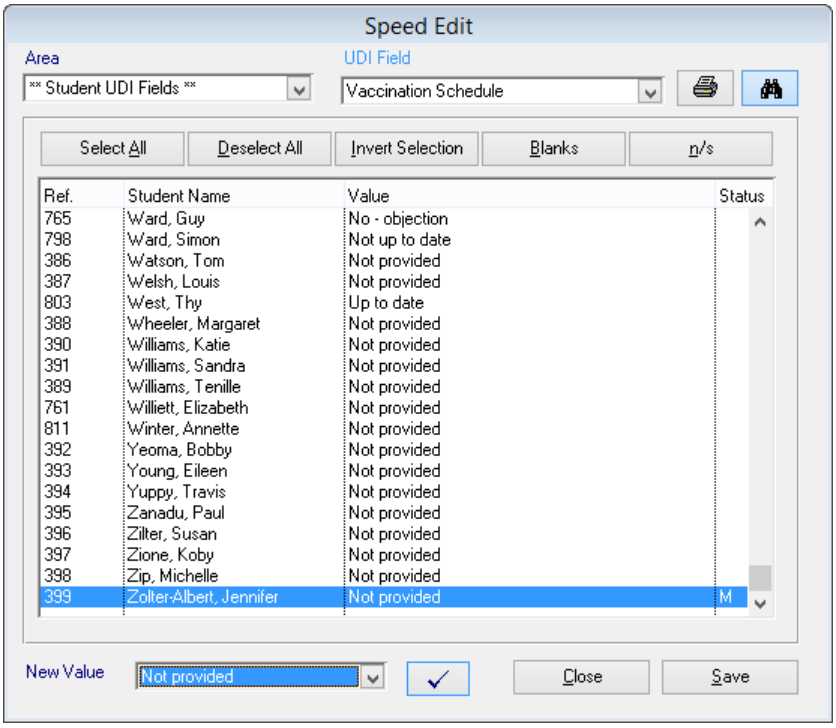
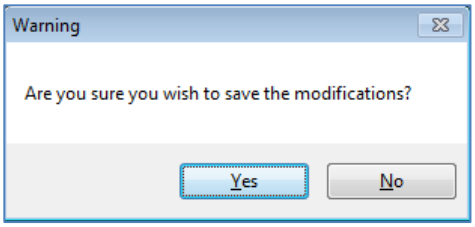
- Select **Not Provided** from the **New Value** menu



- Click **Apply Changes**



- Click and **Yes**



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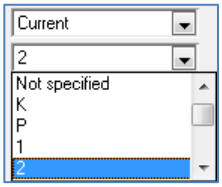
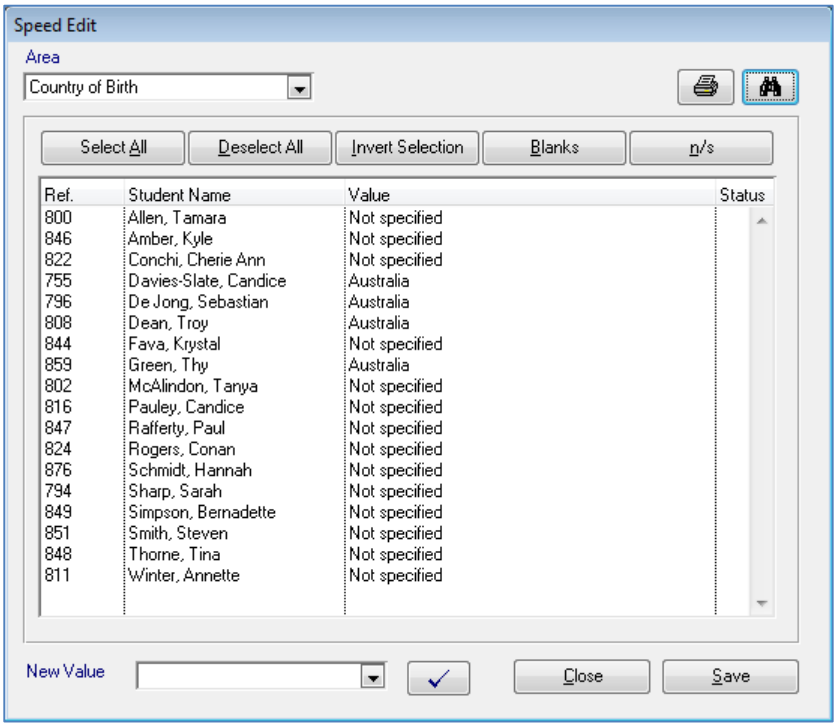
Country of Birth has not been recorded for most of the students in Year 2. Speed Edit their records to show their Country of Birth.

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

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



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



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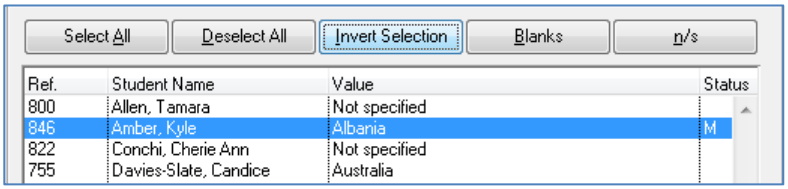
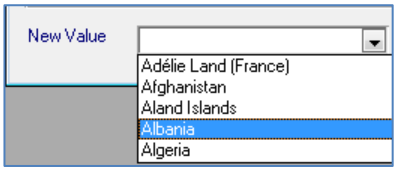
- Highlight ***Kyle Amber***

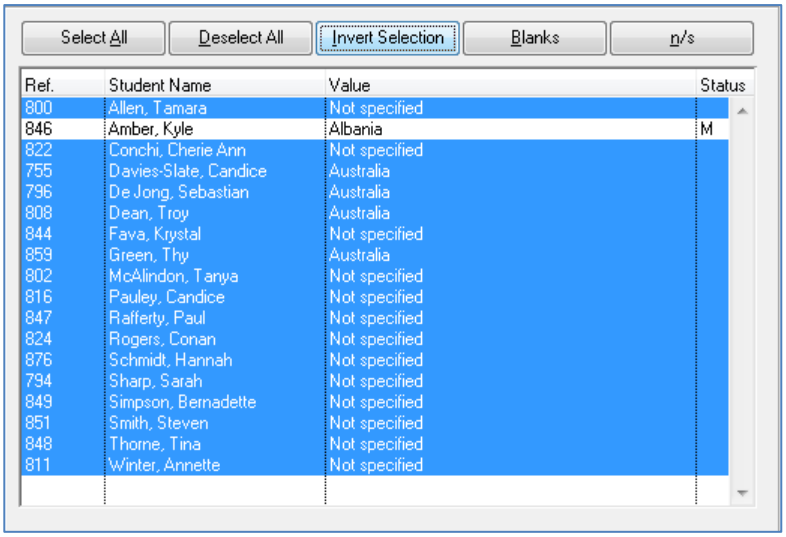


- Select ***Albania*** from the ***New Value*** menu



- Click Apply Changes

- Click



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

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

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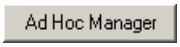
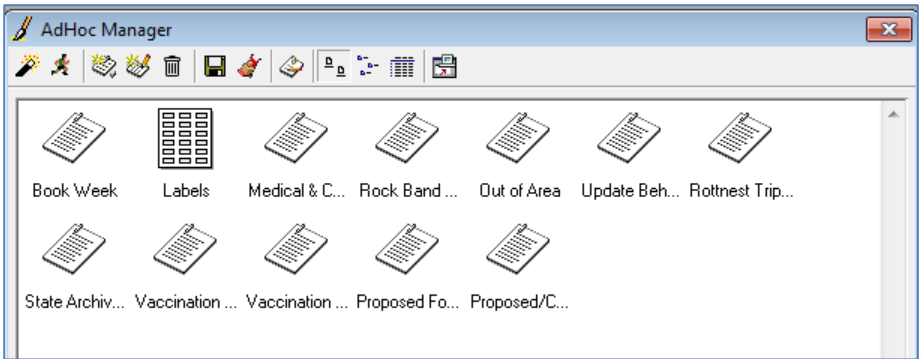
12.1 Ad Hoc Reports

Admin > Reports > Ad Hoc Reports

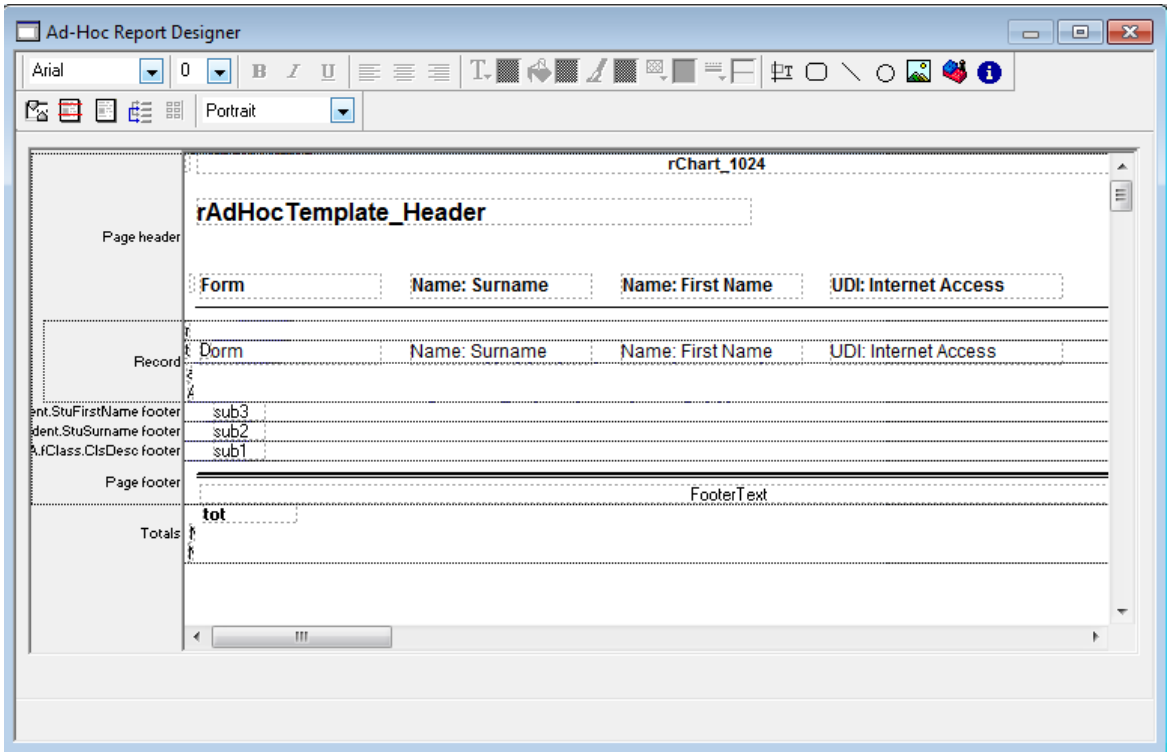
Users can create their own reports using ***Ad Hoc Manager*.**

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.

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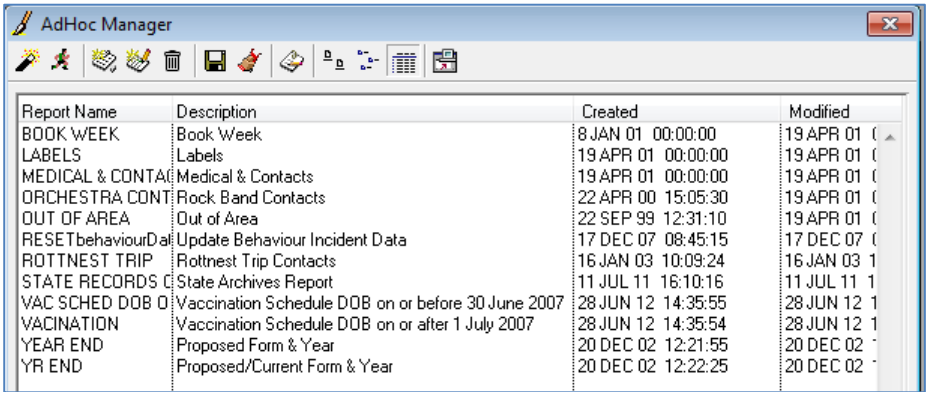
Use the buttons to change the view of the Ad Hoc Reports.



Modify Report

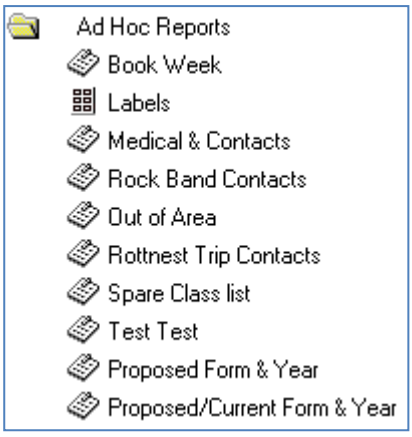
Copy Selected Report

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

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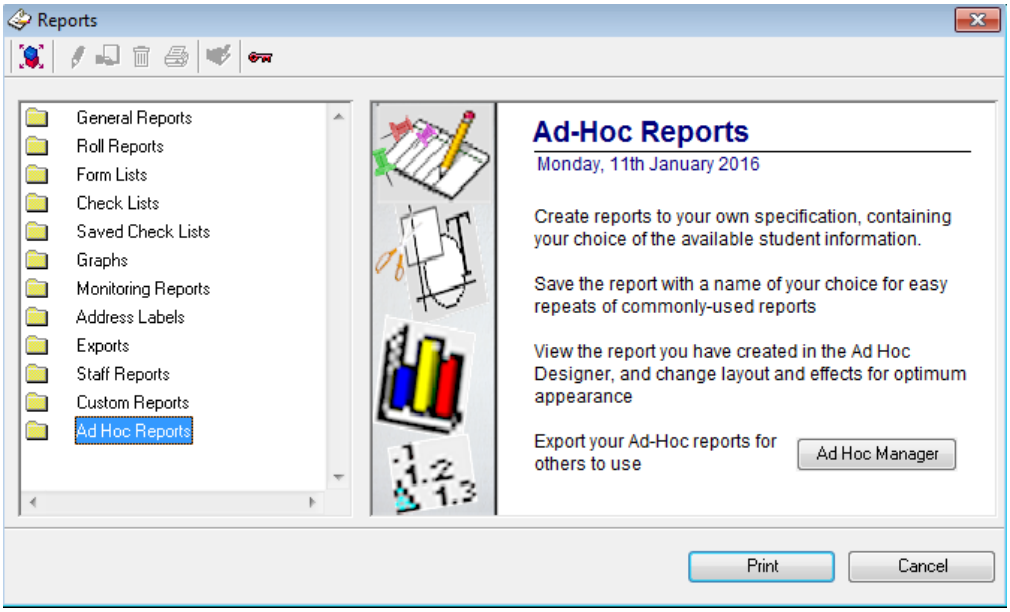
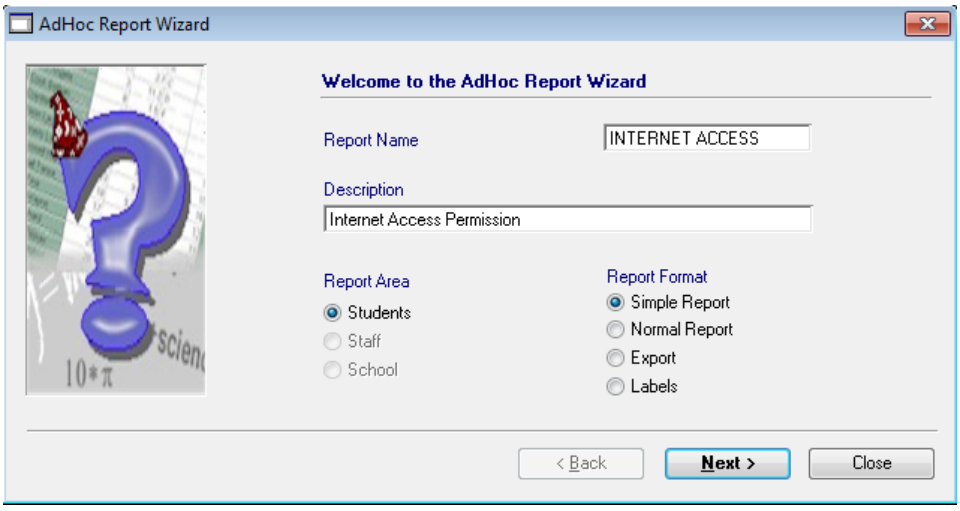
Activity

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



- Click ***Next***

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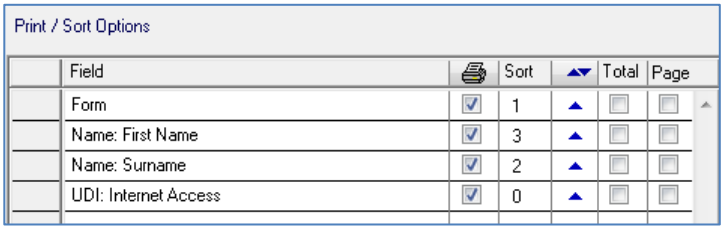
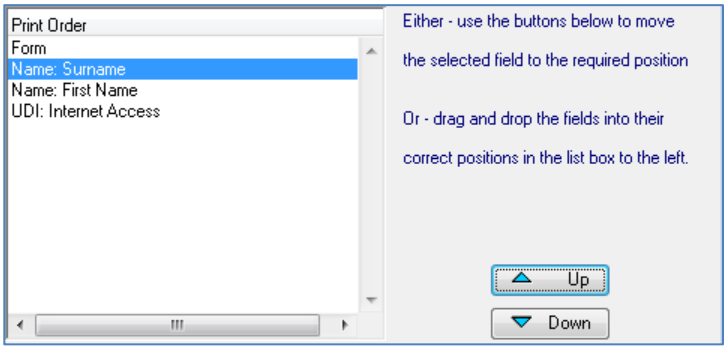
- Check the following fields:
  - ***Form***
  - ***Name: First Name***
  - ***Name: Surname***
  - ***UDI: Internet Access***

- Click ***Next***
- Leave the ***Selection Criteria*** as ***ALL***
- Click ***Next***
- Select the following ***Print/Sort Options:***



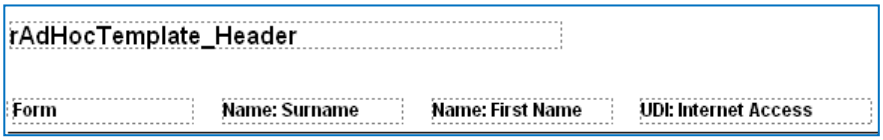
Note: Normally a Page break would be used for Form or Year for this type of report.

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



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

The Ad-Hoc Designer window opens



- 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

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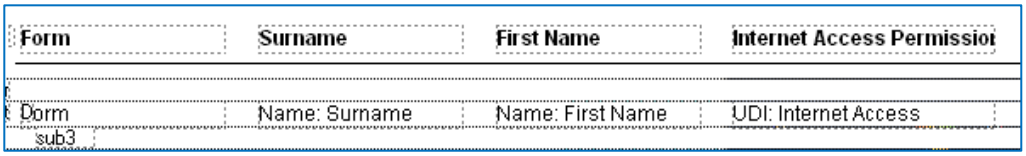
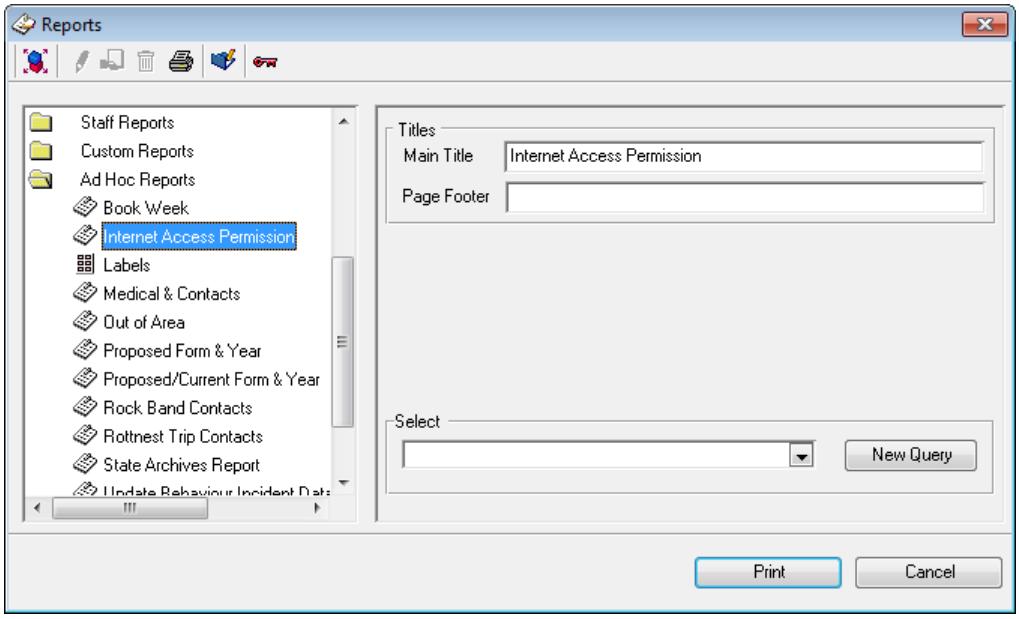


- Close ***Ad Hoc Report Designer*** and ***Ad Hoc Manager***
- Open the ***Ad Hoc Reports*** folder
- Select the report ***Internet Access Permission***



- 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.

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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.

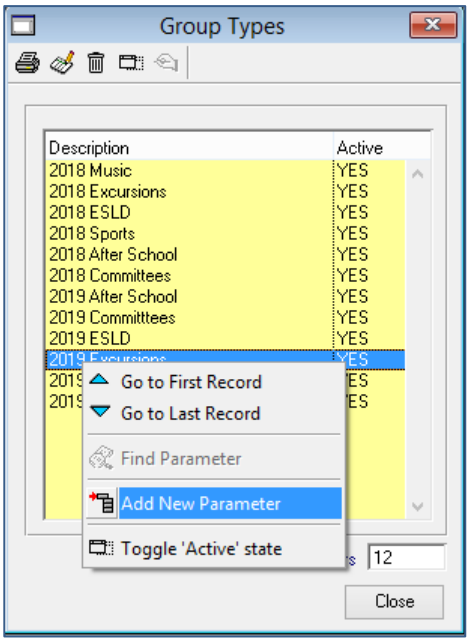
Groups are categorised under **Group Types** which are set up within **Parameters > Group Types**.

13.1 Group Types

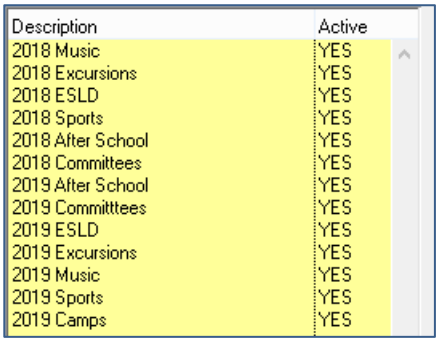
Activity

General > Parameters > Group Types

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



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



- Close Group Types and Parameters

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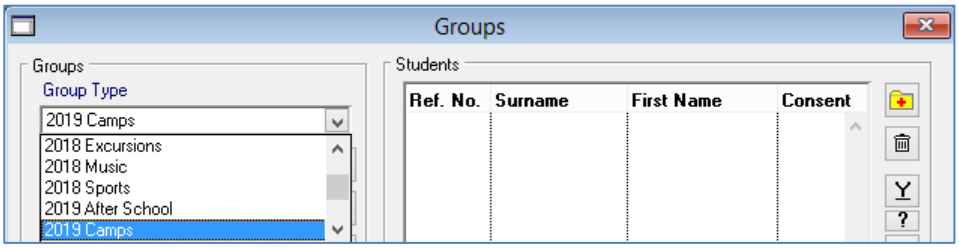
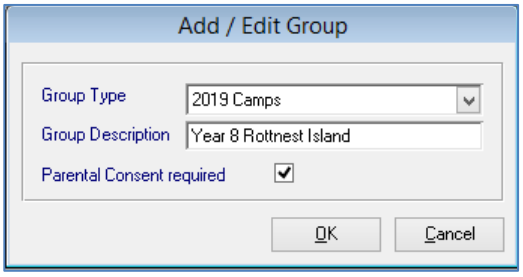
General > Groups

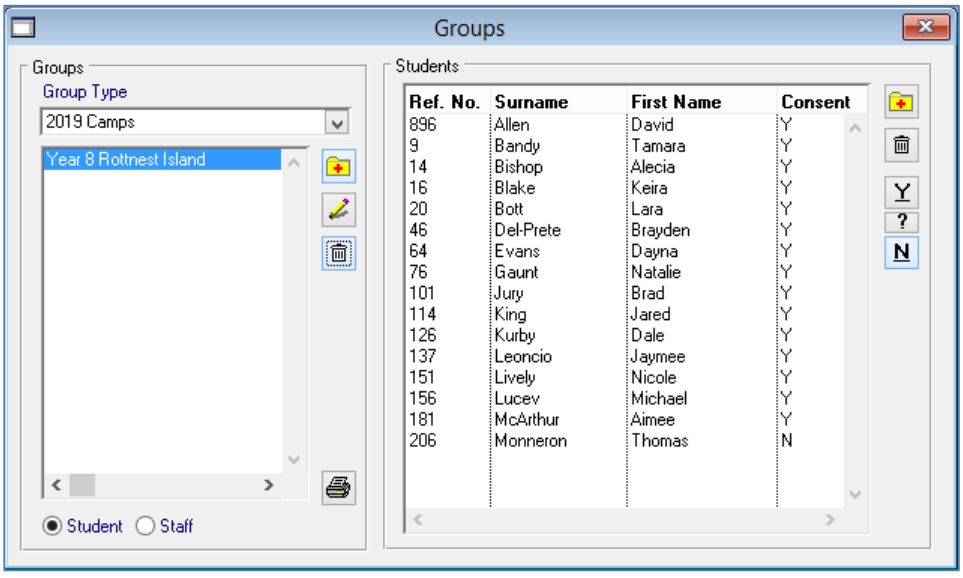
- From the ***Group Types*** menu, select ***2019 Camps***



- 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

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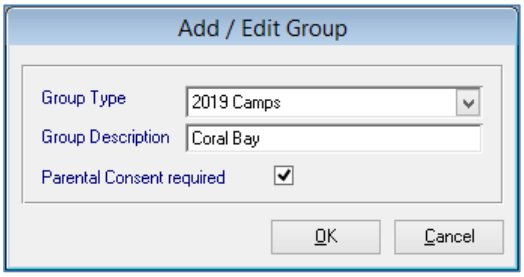
- Add a second Group ***Year 10 Coral Bay*** and again check ***Parental Consent required***
- Click ***OK***



- 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

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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.

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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

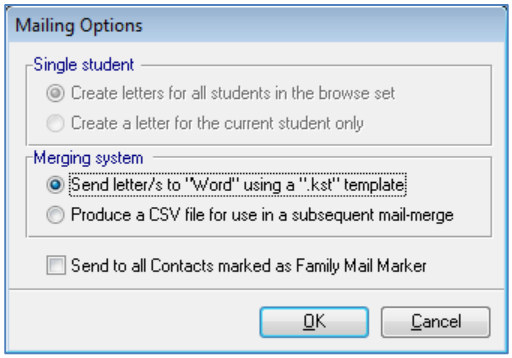
The first is by way of using mail merge fields available through the database. The Integris database is supplied with a mail merge function whereby certain administrative details such as student's names and addresses can be dynamically embedded into a MS Word template. These can then be saved as school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

Option 2

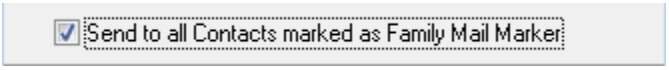
The second way is to create an export file, which then allows users to use the MS Word mail merge functions to create their letters or other documents such as address labels, by linking to this exported data.

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.

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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).

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

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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 New!	<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.

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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

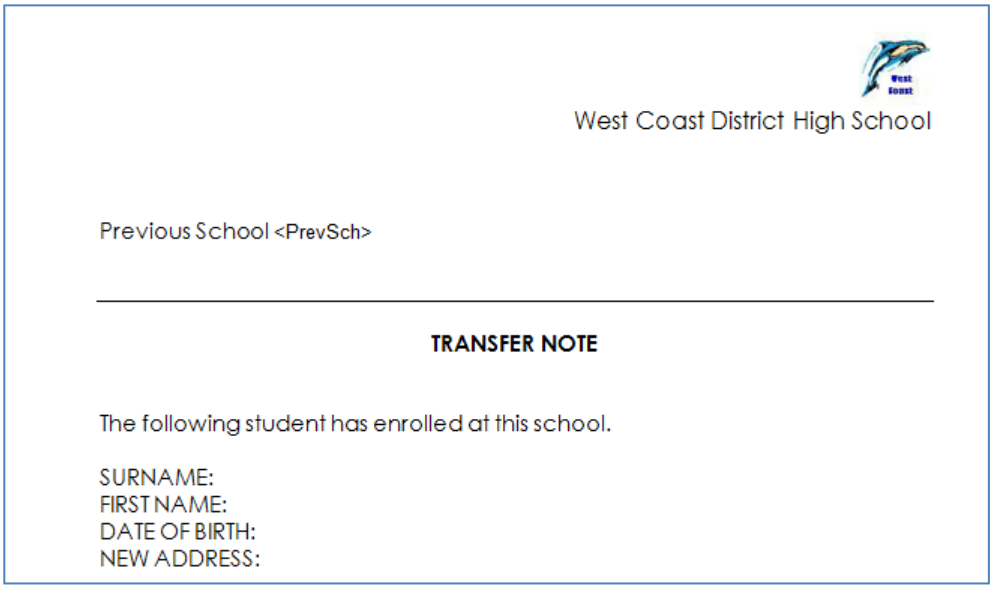
Activity

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



West Coast District High School

Previous School <PrevSch>

TRANSFER NOTE

The following student has enrolled at this school.

SURNAME:
FIRST NAME:
DATE OF BIRTH:
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.

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West Coast District High School

Previous School <PrevSch>

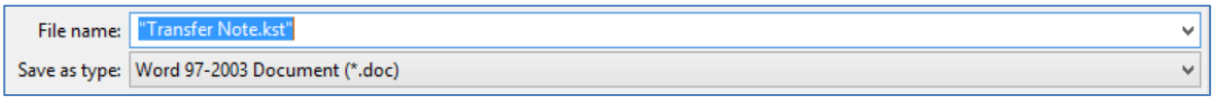
TRANSFER NOTE

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"***



- Click ***Save***

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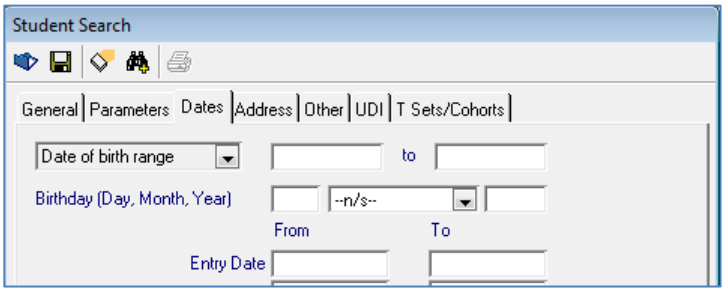
15.1.2 Using the kst template to create letters

Activity

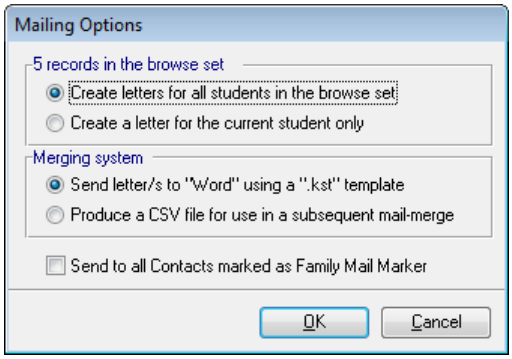
General > Student Details

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

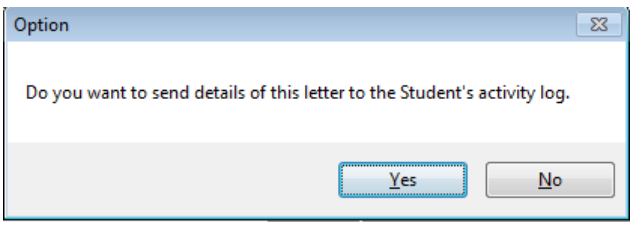
- Find the students who started yesterday
- Click on the **Dates** tab
- Enter Yesterday's and Today's date in the ***Entry Date From*** and ***To*** fields
- Click **Find, Select** and **Yes**



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



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



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

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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

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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.

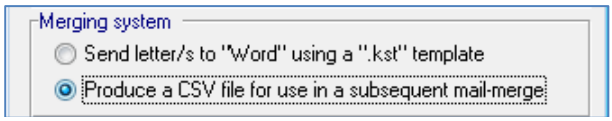
Find the student/s to which you wish to send a Letter

This creates a browse set.

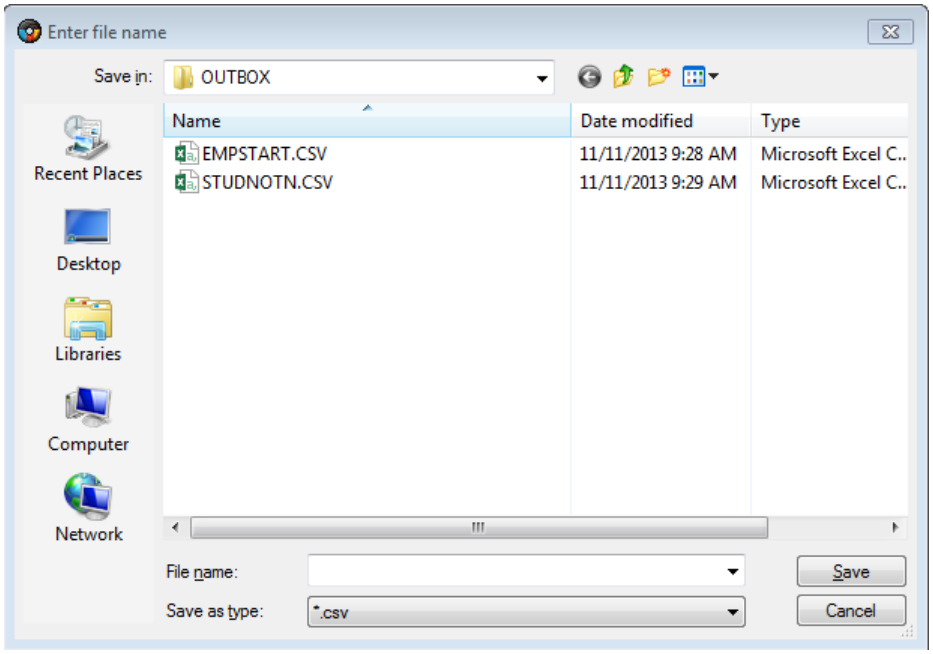
- Click Send Letter in the Student Details window

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.

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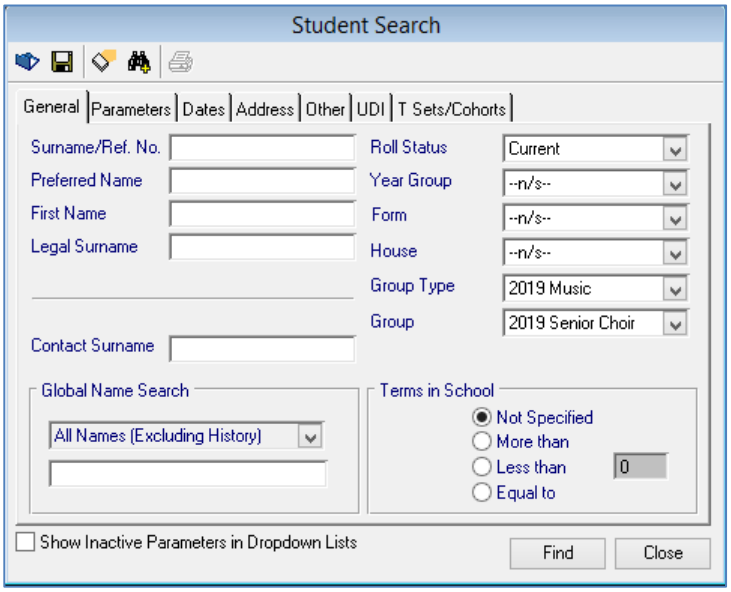
15.2.1 Creating an Export (.csv) File

Activity

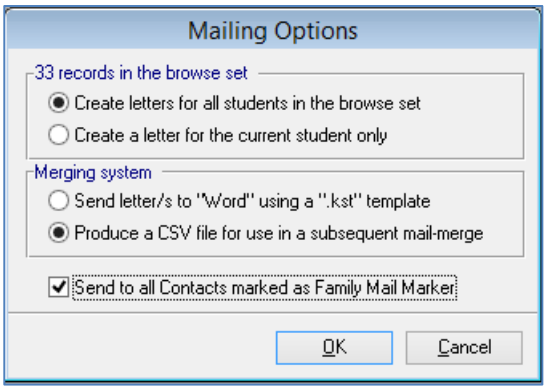
General > Student Details

- Find the ***Senior Choir***



- ***Select All*** the students from the list

- Click Send Letter
- Select the following options



- Click ***OK***

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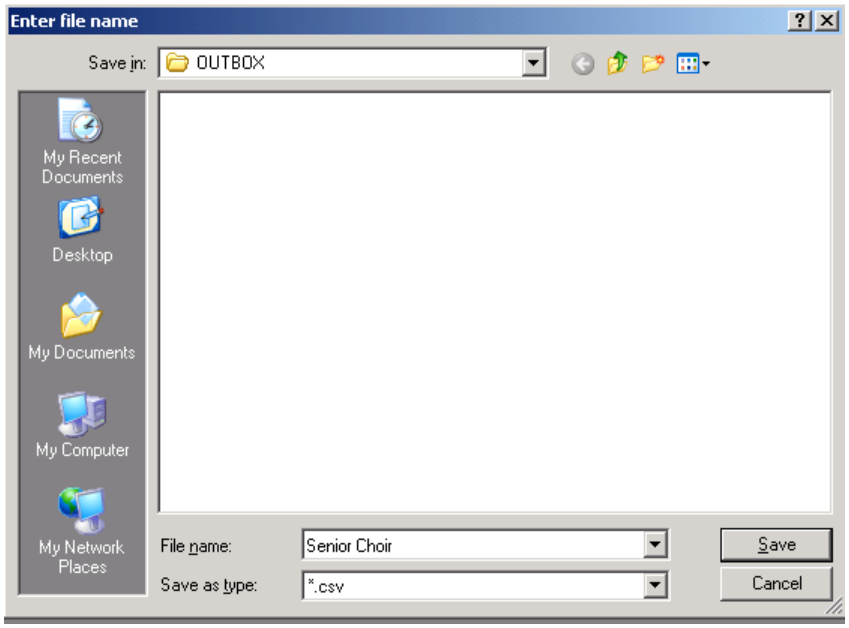
Note: The file will default to save in the Integris Outbox, however you can save it to your desktop or any other location.



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

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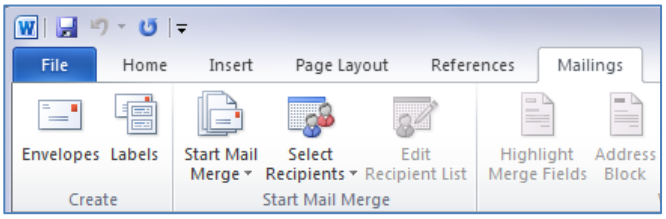
15.2.2 Creating a Mail Merge Letter in Word – Using Letters

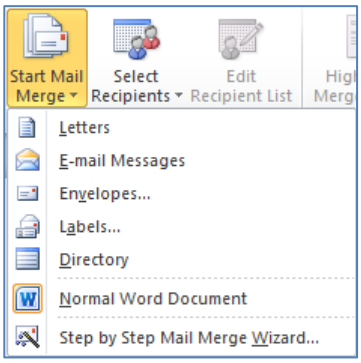
Activity

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

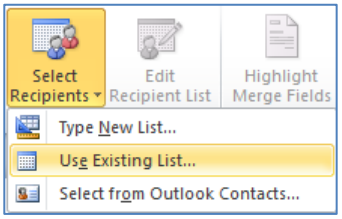
- Open a new Microsoft Word document
- Click on the **Mailings** Menu



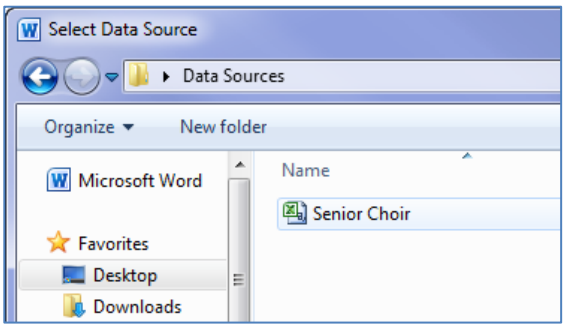
- Click on the small arrow at the bottom of the **Start Mail Merge** icon



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



- Browse to the csv file on your desktop



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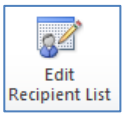
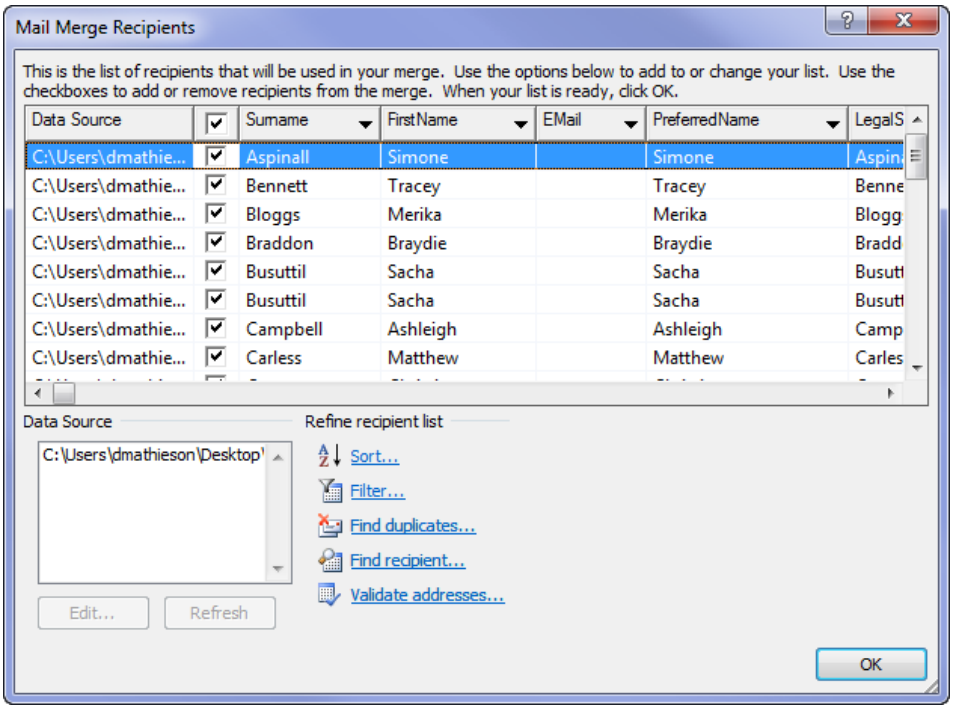
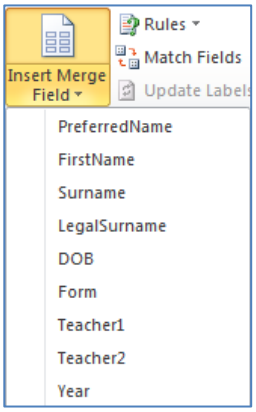
- Highlight and Click ***Open or Double Click***
- Click the Edit Recipient List icon





- 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.

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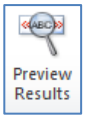
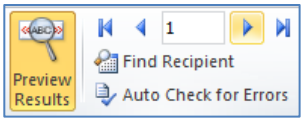
- Click on ***AddeeSalutation***
- Move your cursor to the next line
- Click on the small arrow at the bottom of the **Insert Merge Field** icon
- Click on ***AddeeAddL1***

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.

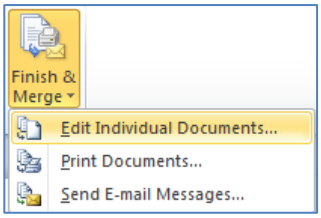


If there are mistakes in your letter:

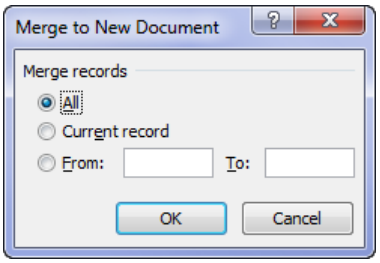
- Click ***Preview Results*** again and make any changes required

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

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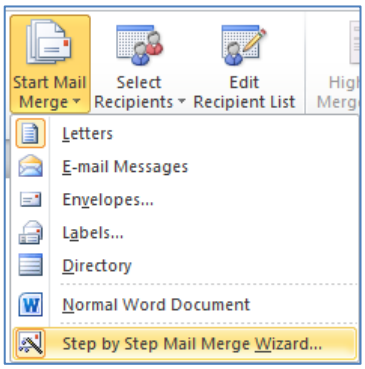
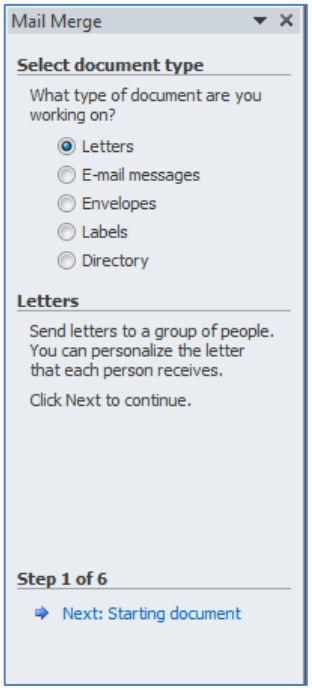
15.2.3 Creating a Mail Merge Letter in Word – Using the Mail Merge Wizard

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.

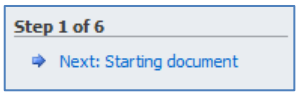
- Select **Step by Step Mail Merge Wizard** from the **Start Mail Merge** Icon



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**

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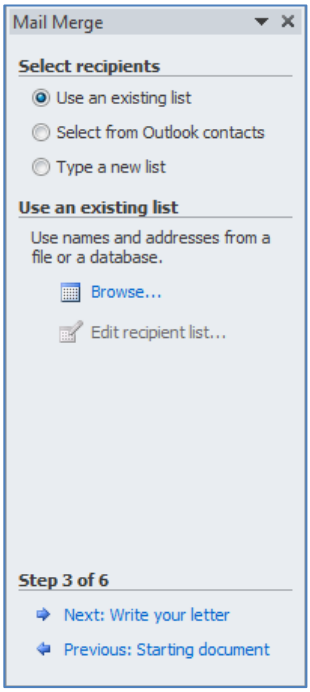
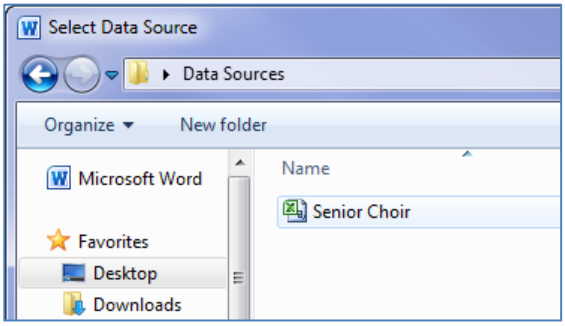
- Ensure **Use an Existing List** is selected and click on **Browse**



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



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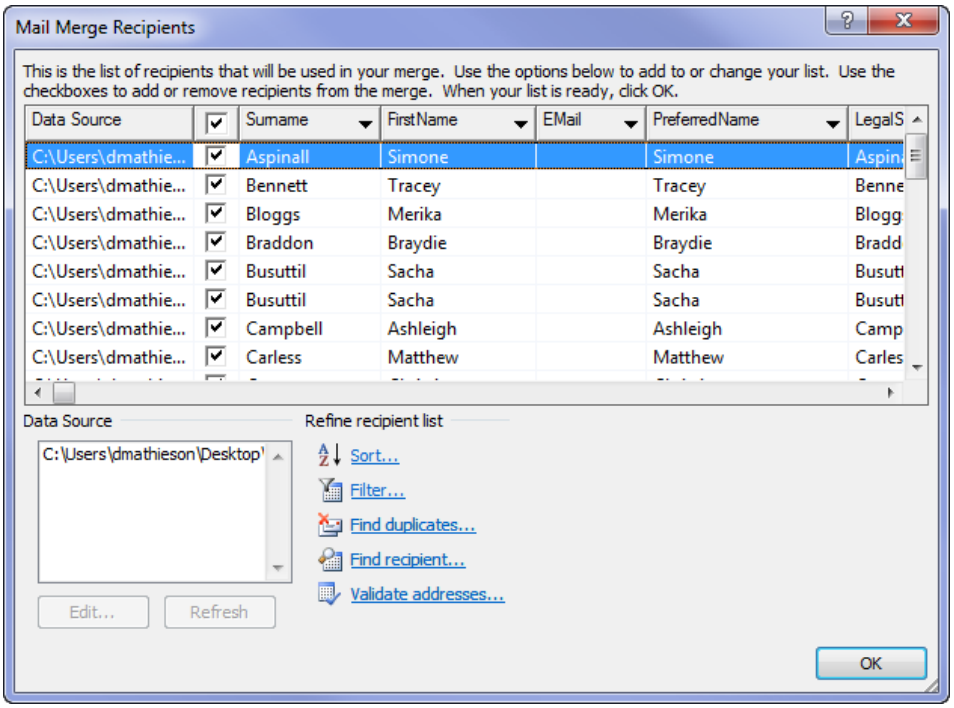
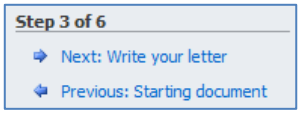
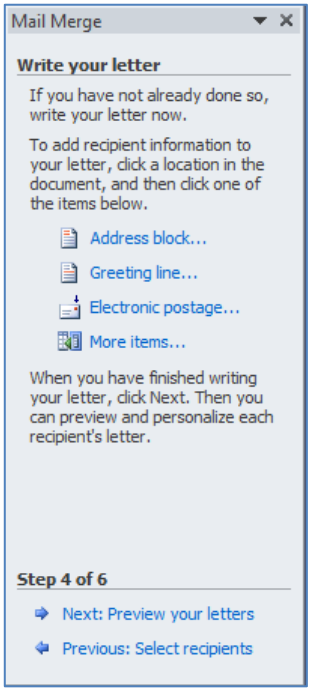
- View your Recipient List and select the recipients required and click OK



- Click Next: Write your letter



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



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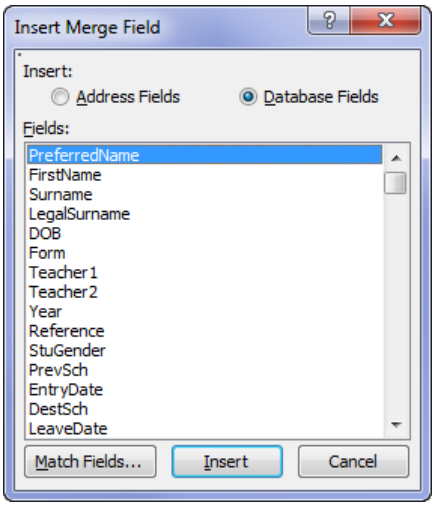
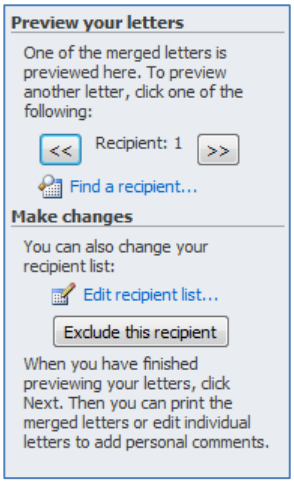
- The available fields will display



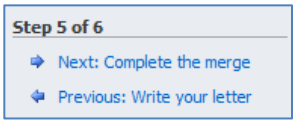
Note: Fields can be inserted by double clicking or highlighting and clicking Insert. If you need to re-position your cursor in the document, you must close this window, move your cursor and click on More Items again.

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.

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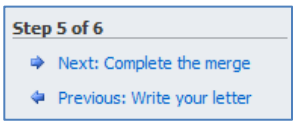
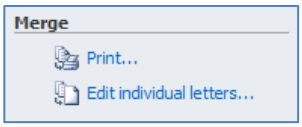
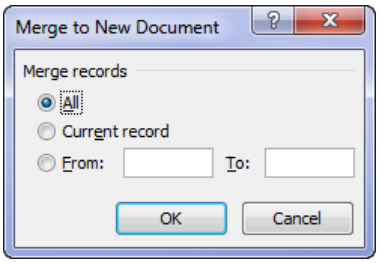
- If you are ready to finish the Mail Merge:
- Click Next: Complete the merge



- 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.



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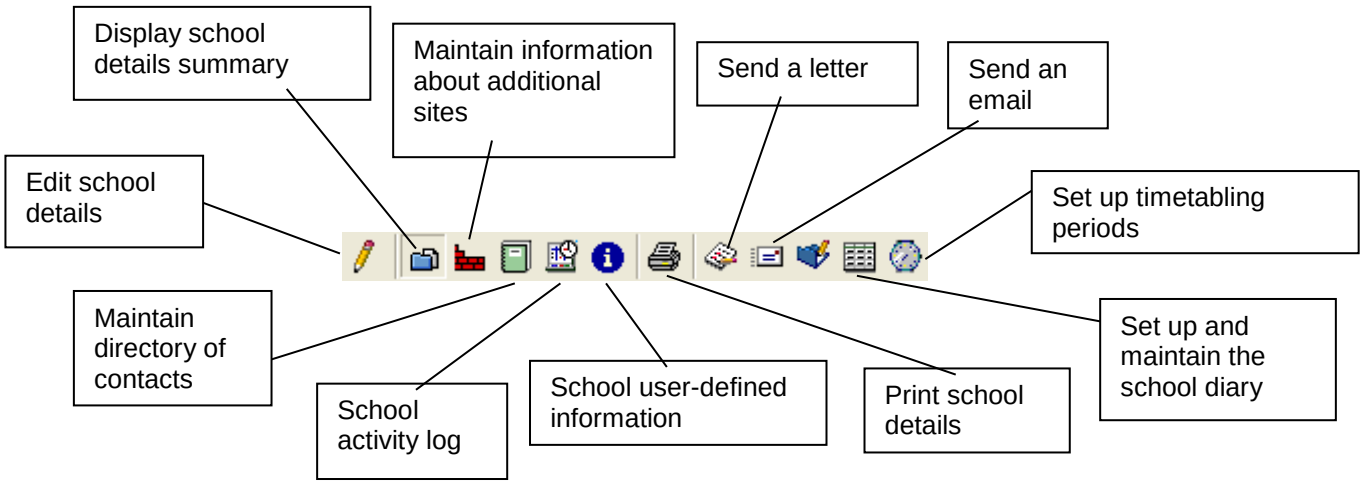
16 School Details

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

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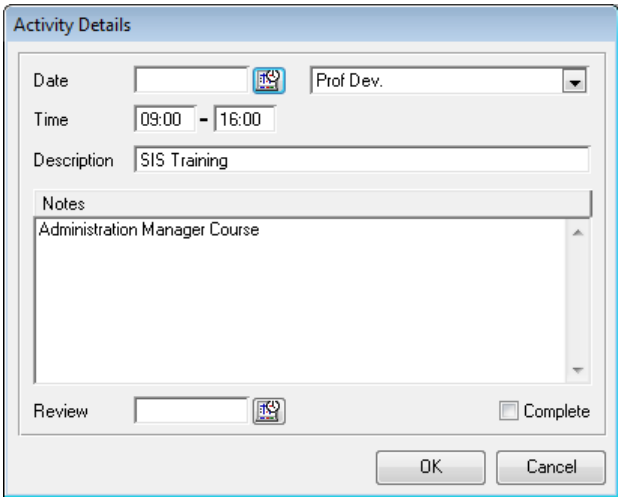
16.1 Entering Events in the School Diary

Activity

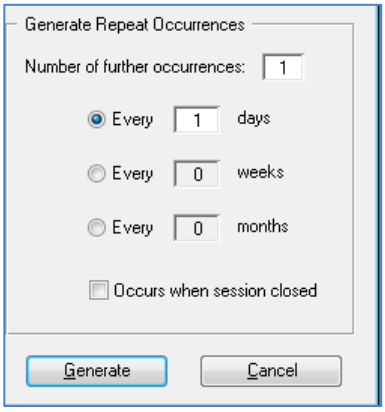
General > School Details

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***



- Click Recurring Events
- Enter the following information



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

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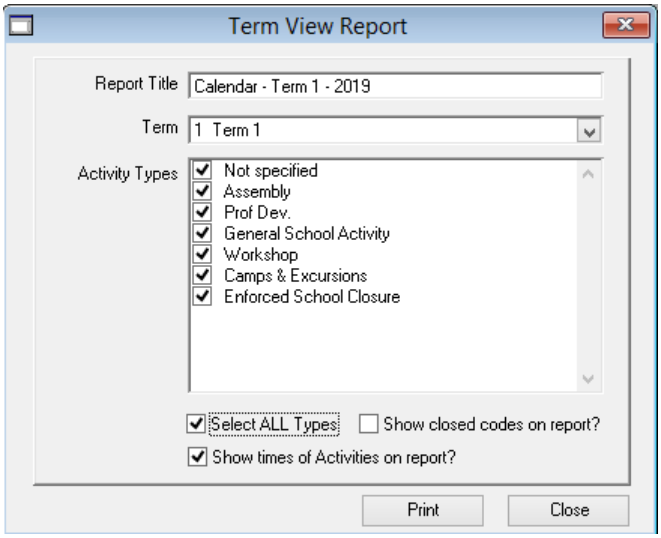
16.1.1 Printing the Term Planner

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.

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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.

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17.1 Bring your Data File up to Date

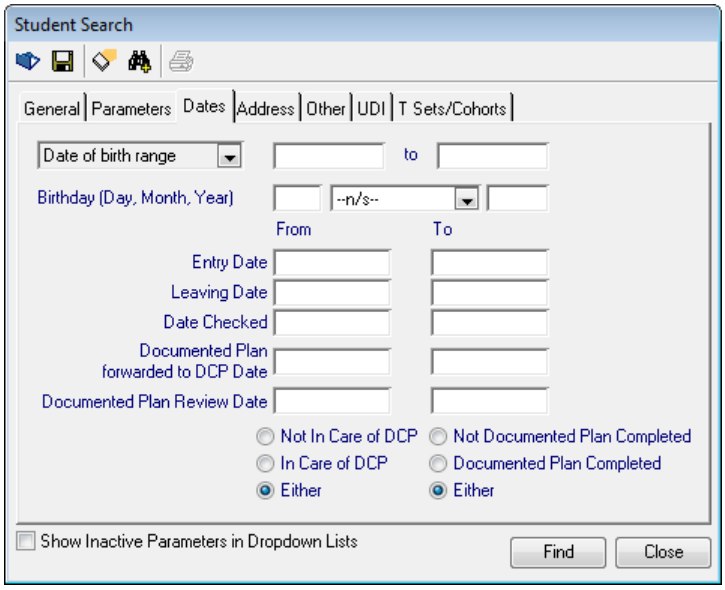
Ensure students who have left have been moved to the Former Roll and students coming to the school next year have been added to the Admissions Roll. If the Lesson Attendance module is being used, make sure attendance data is up to date.

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***



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

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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.

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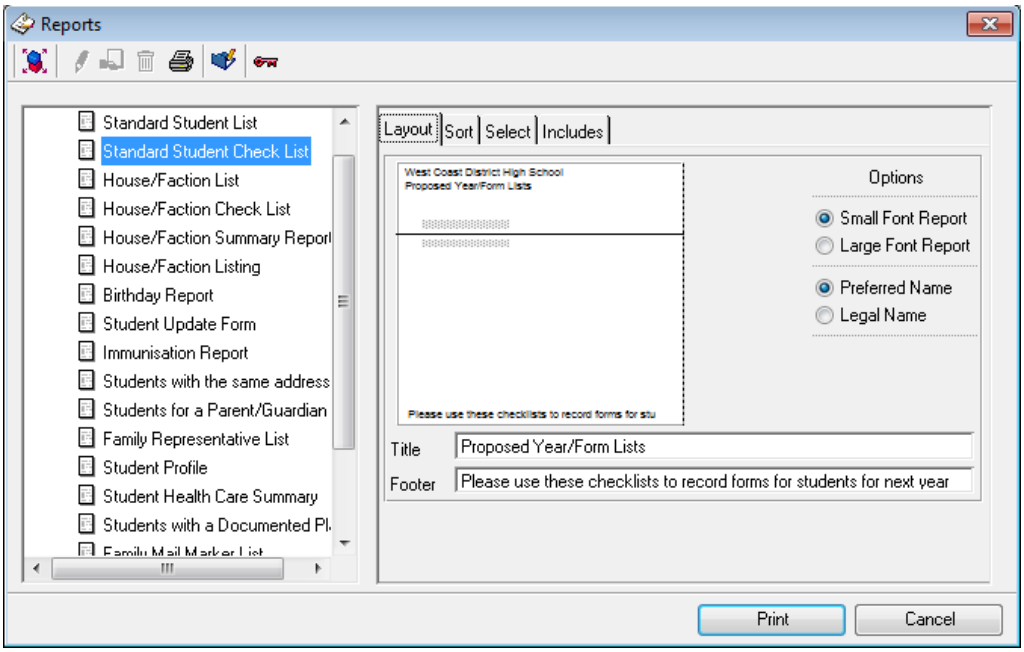
Activity

WA Reports > Reports > WA Reports> Standard Student Checklist

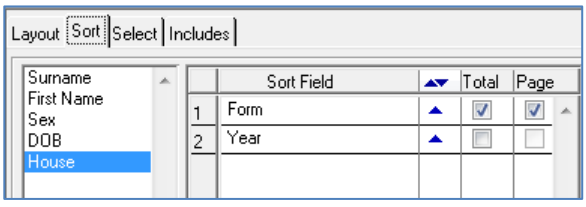
- Click ***Standard Student Check List***
- Enter ***Proposed Year /Form Lists*** as the title



- 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***



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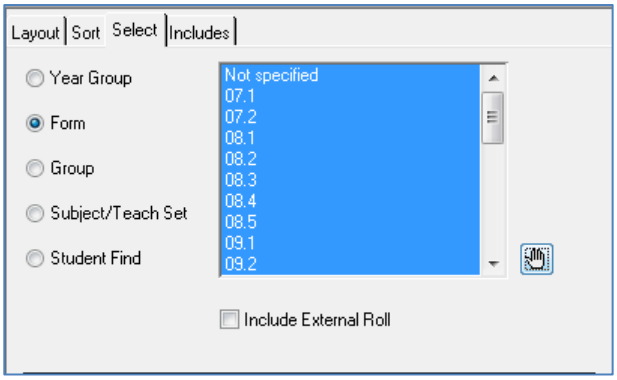
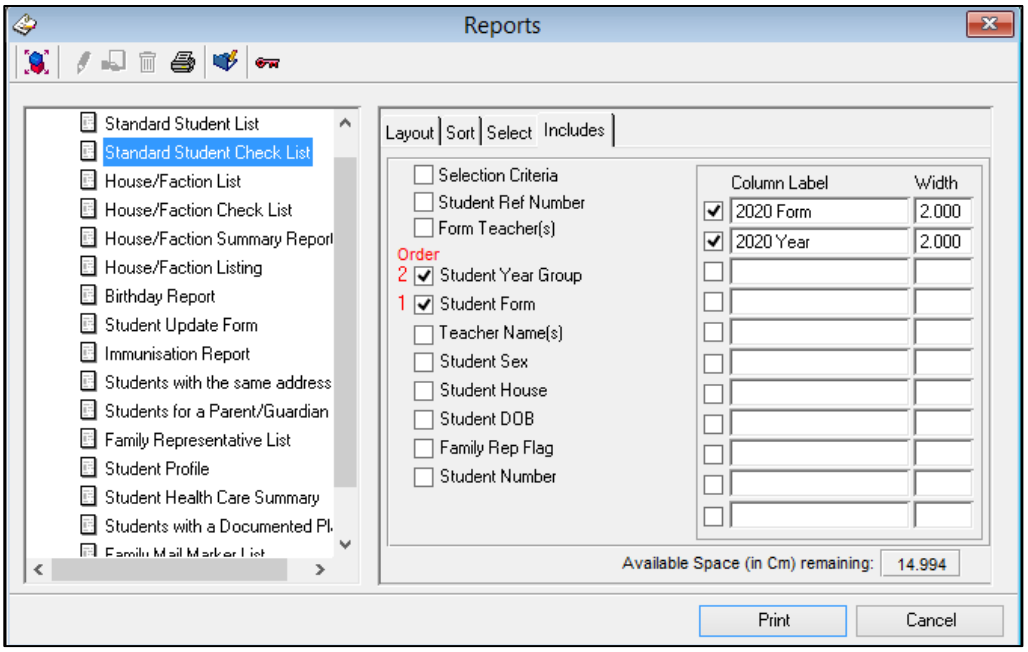
- Click on the ***Select*** tab and choose ***Form***
- Click Select All



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



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

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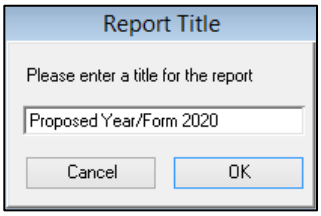
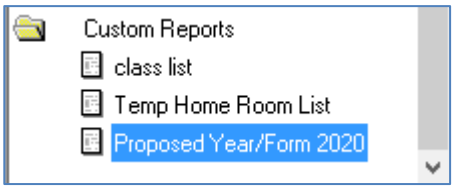
Save as a Custom Report

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



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



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17.3 Check Intake Year for Secondary Schools

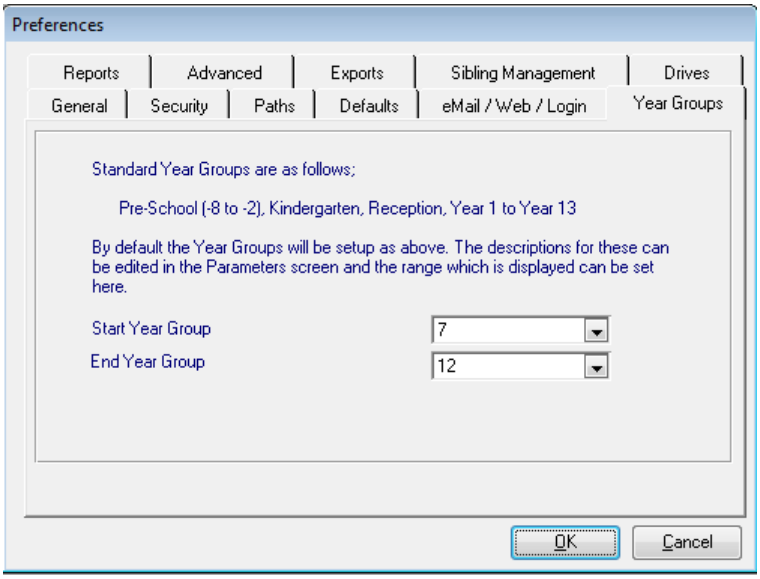
Secondary Schools will need to check their Intake Year is set to Year 7 in Year Groups

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.

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17.4 Check Leavers Year in School Details

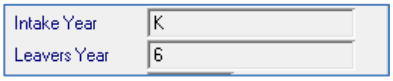
This is necessary so that the students in the final year of the school will automatically be transferred to the **Former** roll as part of the Year End process. The **Leavers Year** is probably already set up; however check that it is accurate.

Activity

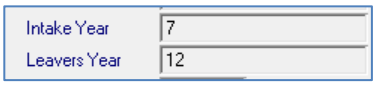
General > School Details

- Check the ***Leavers Year*** is correct

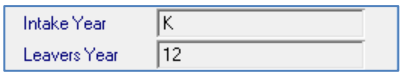
- Click to make any changes
- Primary Schools will have their Leavers' Year set to Year 6



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



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

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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.

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17.6 Set up the School Calendar for the New Year

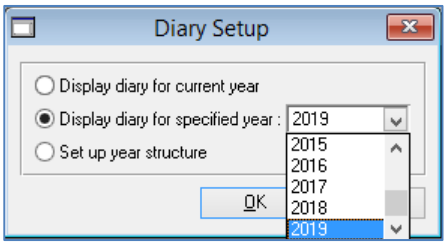
Activity

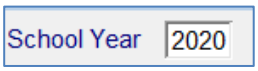
General > School Details

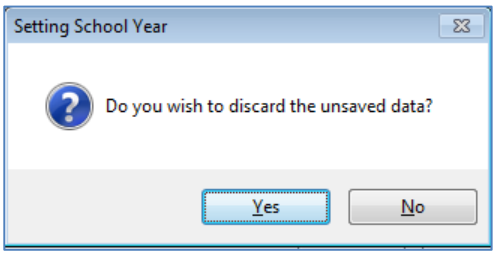
Set up the new school year for (2020)

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

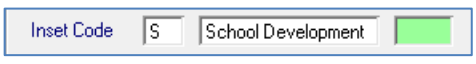
- Click Display School Diary
- Click Set Up School Year
- Click ***Display Diary for Specified Year*** to double check that the following year has not already been set up

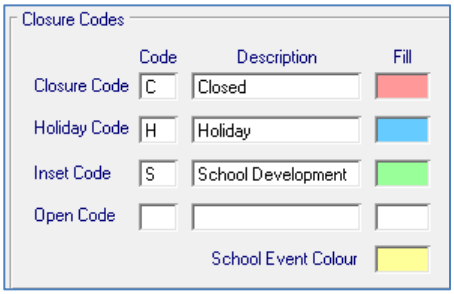


- Click ***Set up year structure***
- Click ***OK***
- Enter the year in the ***School Year*** field and press ***<Tab>*** 



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

to 



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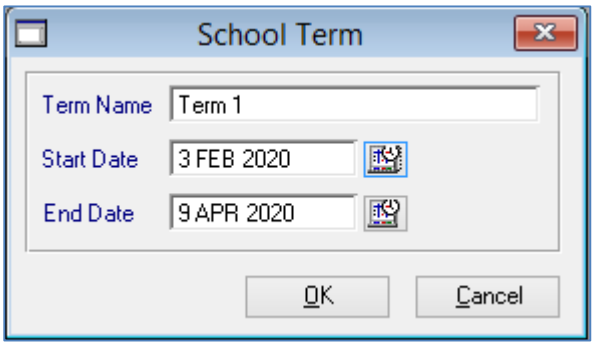
Set up terms within the new year:

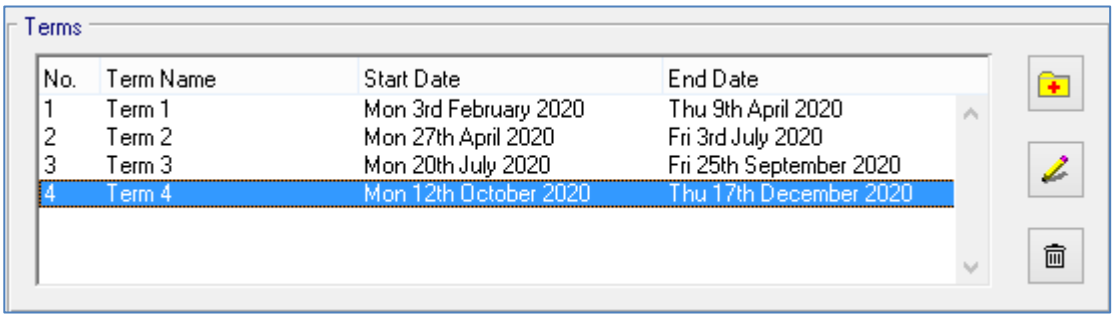
- Click Add Term to add details of terms, (these are entered one at a time), dates may be typed in or selected via the Activity Calendar button



- 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



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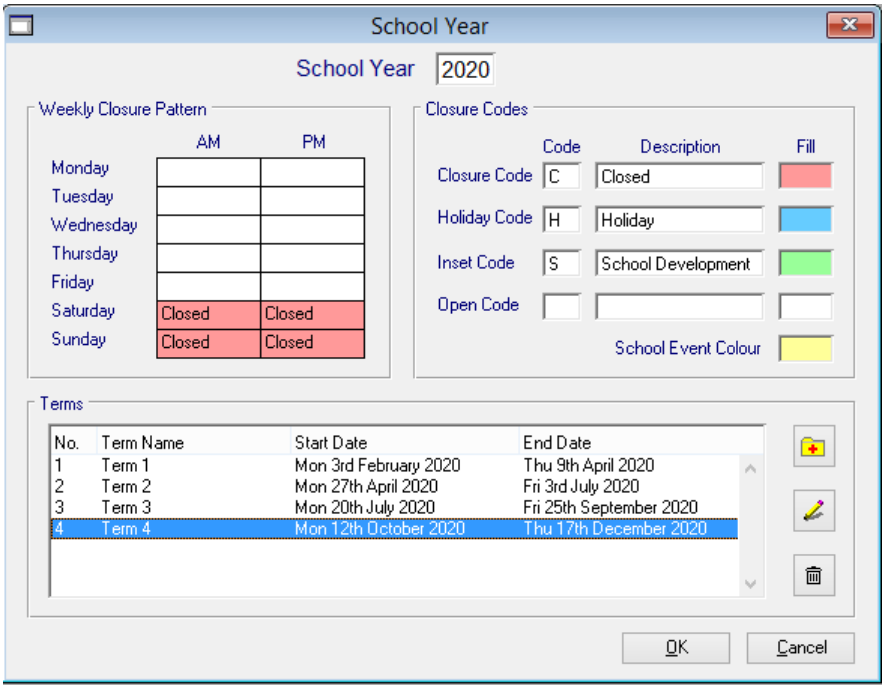

Note: Terms are always entered as starting on a Monday. If the school is not open on the Monday, it may be entered as a Closed day in the School Diary.

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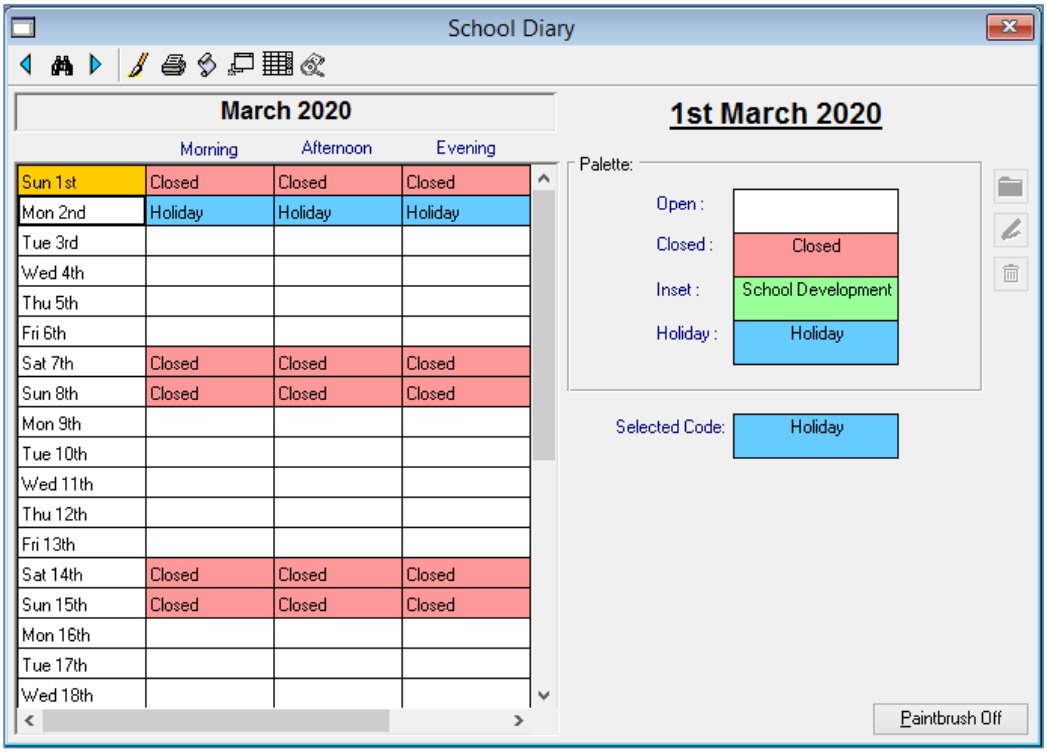
Identify days within the school year when the school will be closed

- 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 ***2nd March*** as Public Holiday



Note: Schools may conduct School Development Days prior to the students' return. As the School Calendar is set up to commence on Monday 2nd 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

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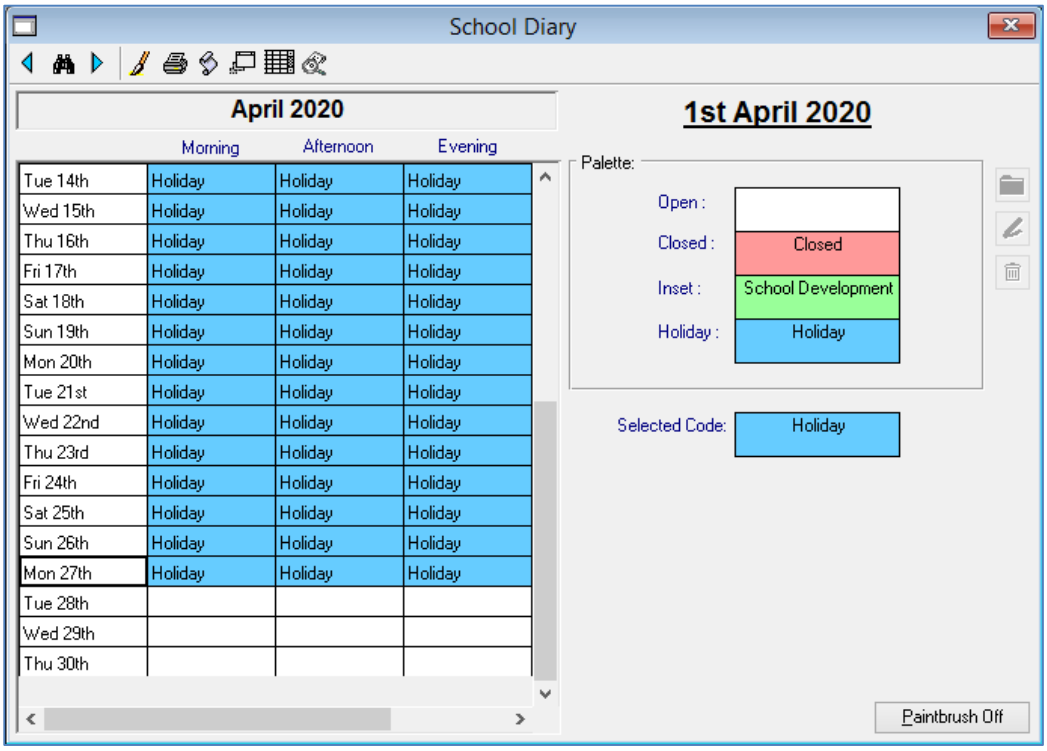
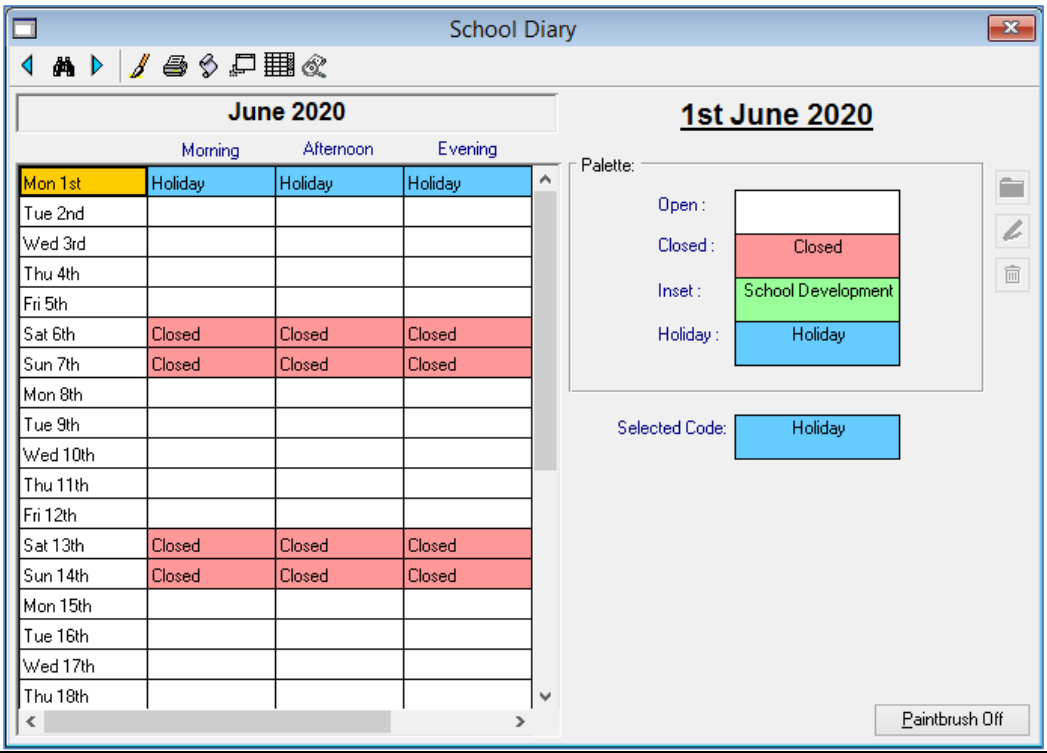
- Use the blue chevrons to navigate to ***April***
- Enter ***Monday 27th*** as a public holiday



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



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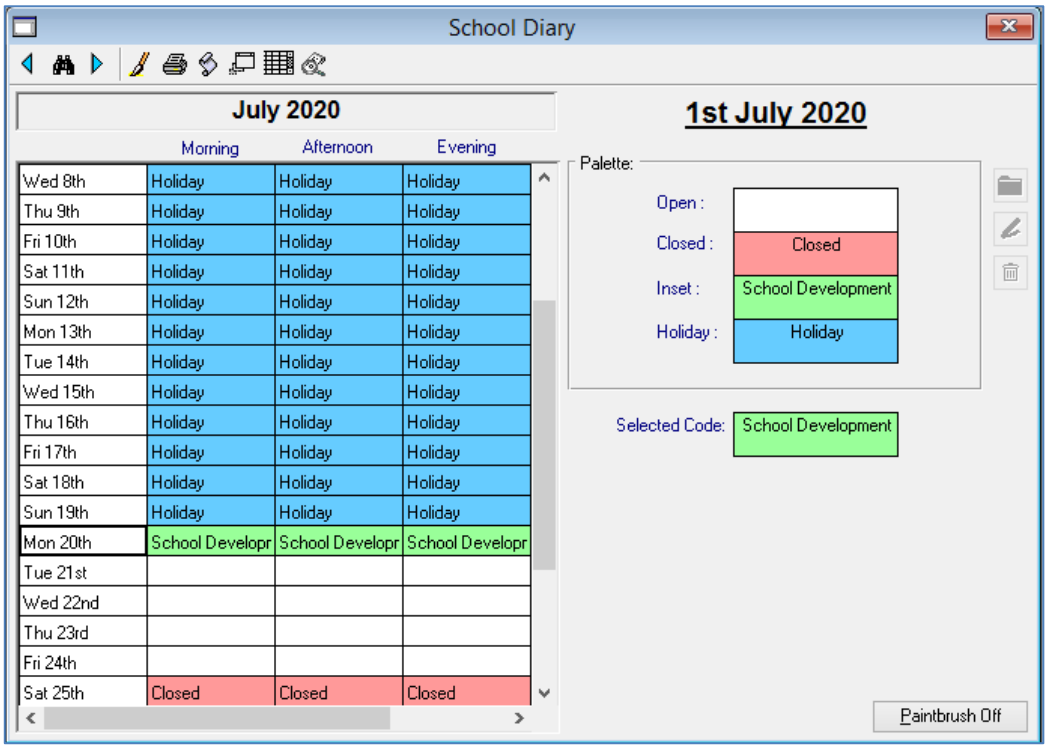
- Navigate to ***July***
- Change the Paintbrush Code to green School Development
- Enter ***Monday 20th July*** as a ***School Development*** day



- Turn the paintbrush off and Close

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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 S icon will create semester dates.

Selecting the T icon will create term dates.

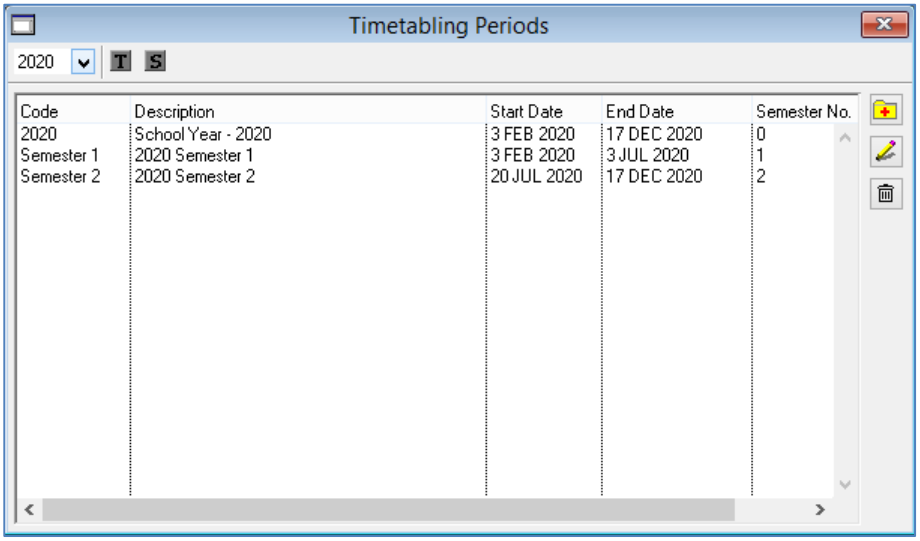
Selecting will allow users to create customised Timetabling Periods. Schools using Timetabling will create the Timetabling Periods they require. Schools not using Timetabling will use the semester Timetabling Periods to enable the reporting of half-day absences in Formal Reports.

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



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

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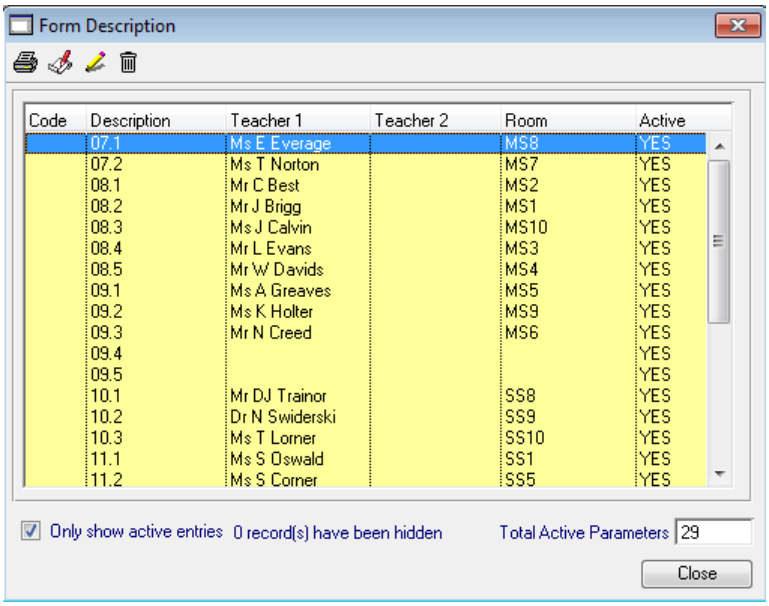
17.8 Set up Form Descriptions for the New Year

Important: Do Not Allocate Teachers at This Time

Activity

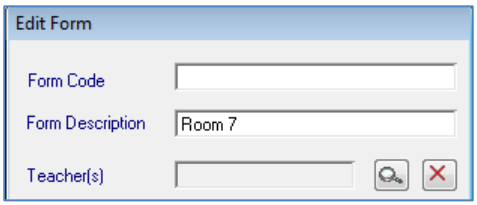
General > Parameters > Form Descriptions

- Double click on ***Form Description***



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)



- 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.

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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.

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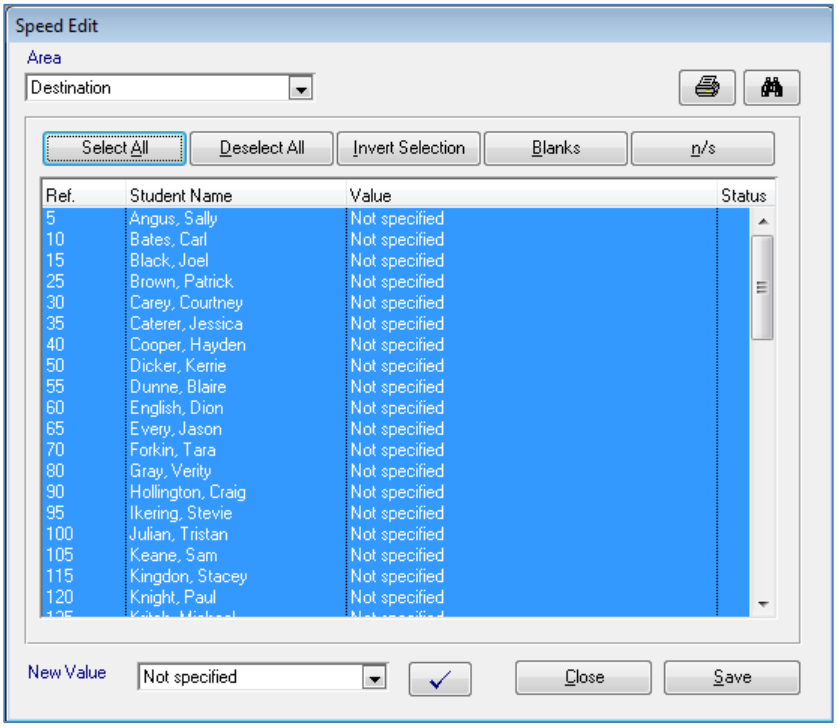
Activity

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***



- 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.

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17.10 Increment Students' Proposed Years and Forms

Admin > Year End

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

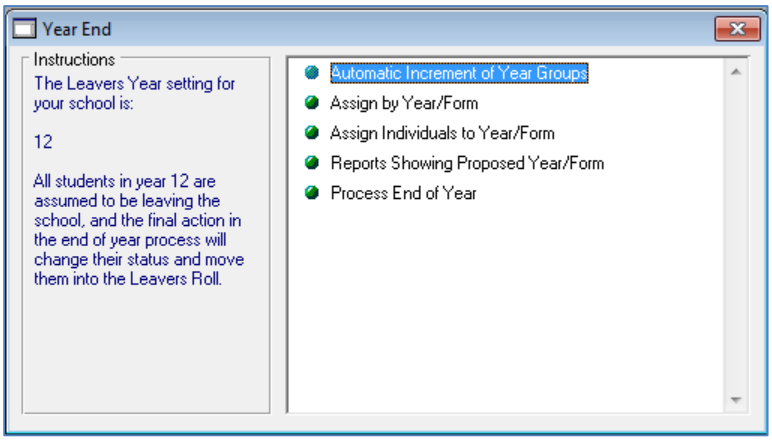
There are three ways to increment the students who are moving up a year within the school:

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

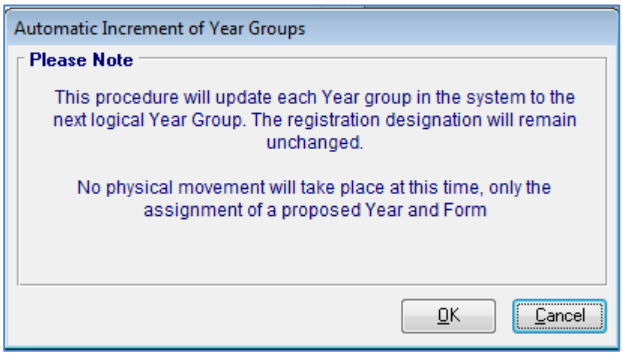
Automatic Increment of Year Groups

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.

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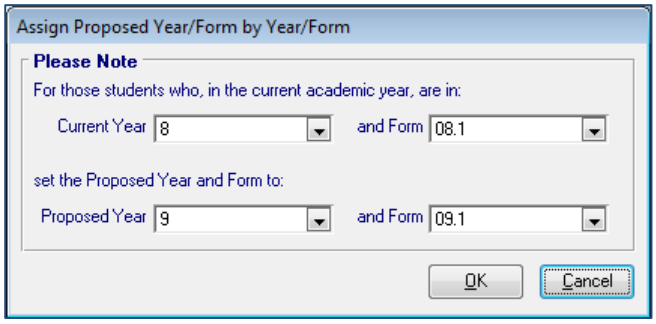
Assign by Year/Form

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.

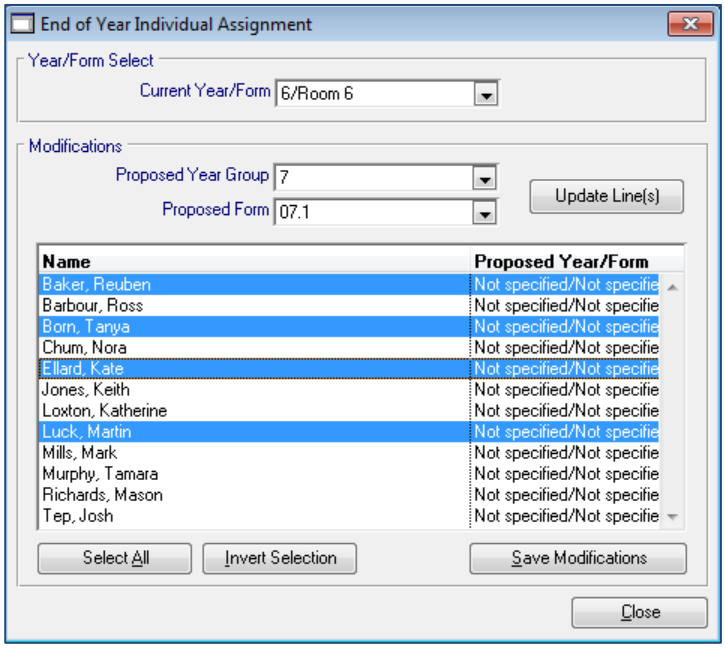
- Select ***Year End*** in the ***Admin*** sidebar
- Click ***Assign by Year/Form***
- Complete for all the Forms, changing the Year and Form



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)***



- Click ***Save Modifications***

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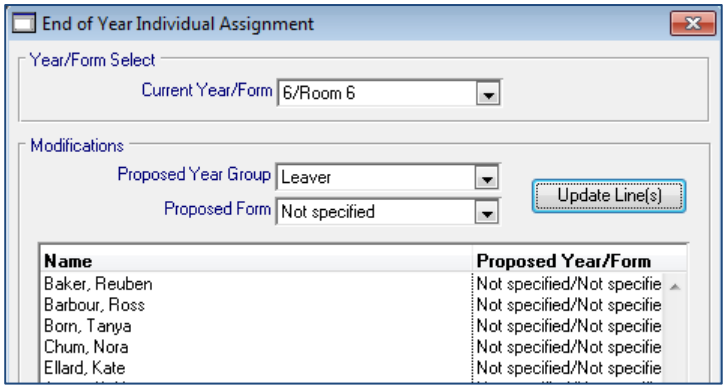
- Check that you have allocated a Proposed Year and Form to each student in the Form
- Repeat for each Form

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

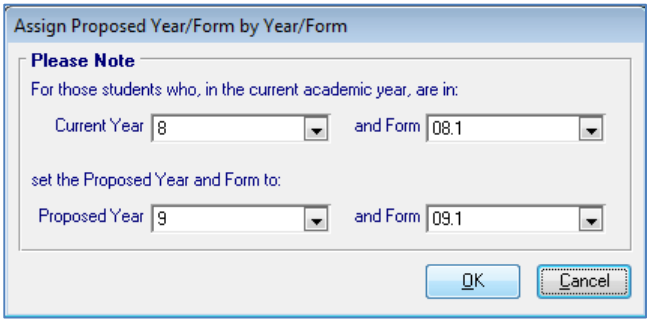


17.10.1 Year End Assign by Year/Form

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

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17.10.2 Assign Individuals to a Year/Form

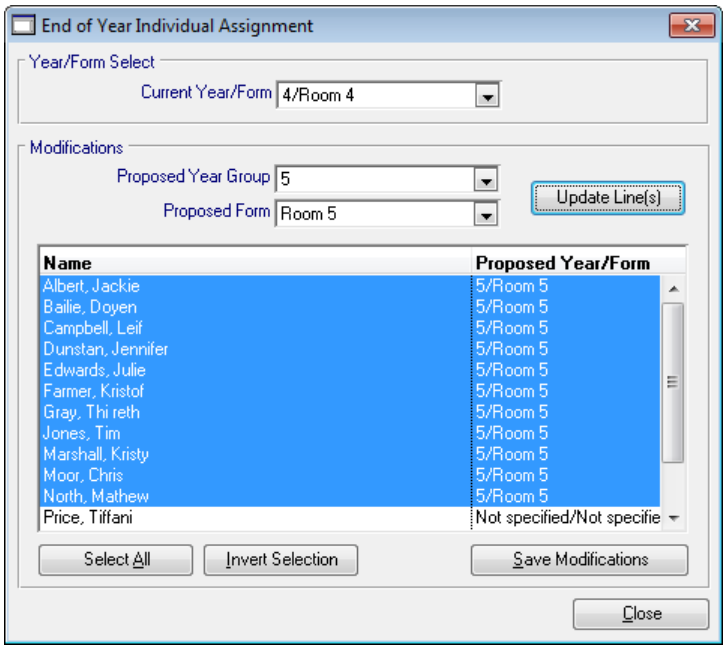
Activity

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***



- 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

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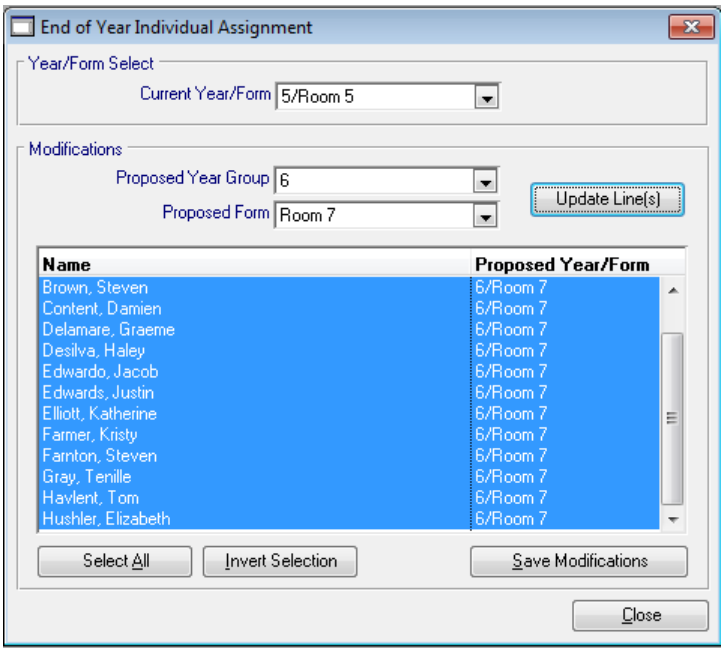
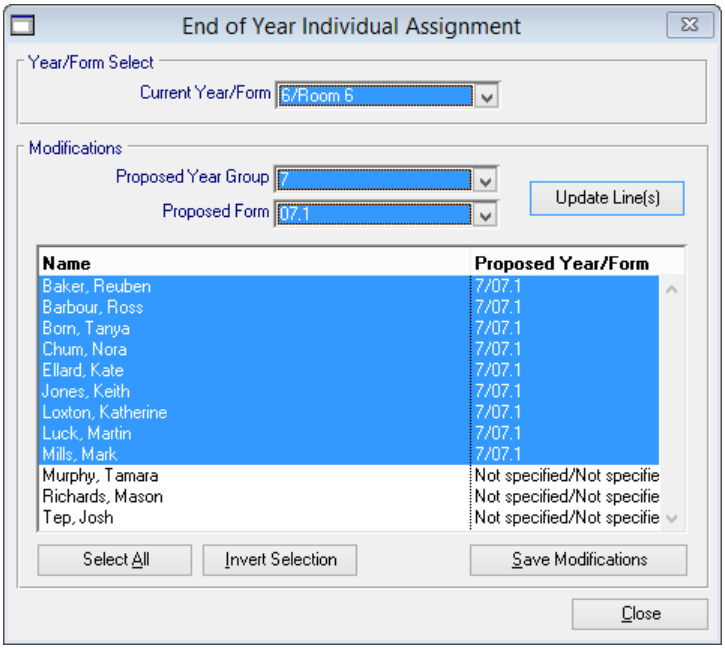
All of the Year 5 students are going into *Year 6* and *Room 7*



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



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

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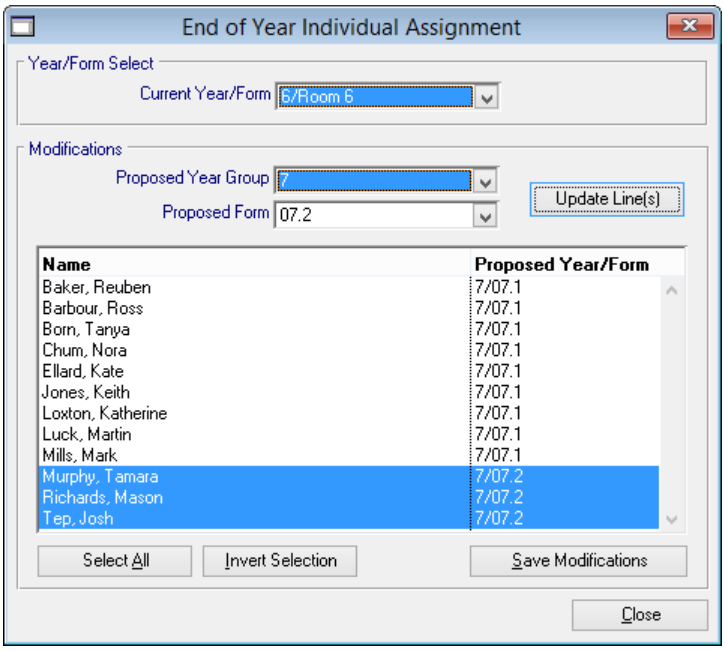
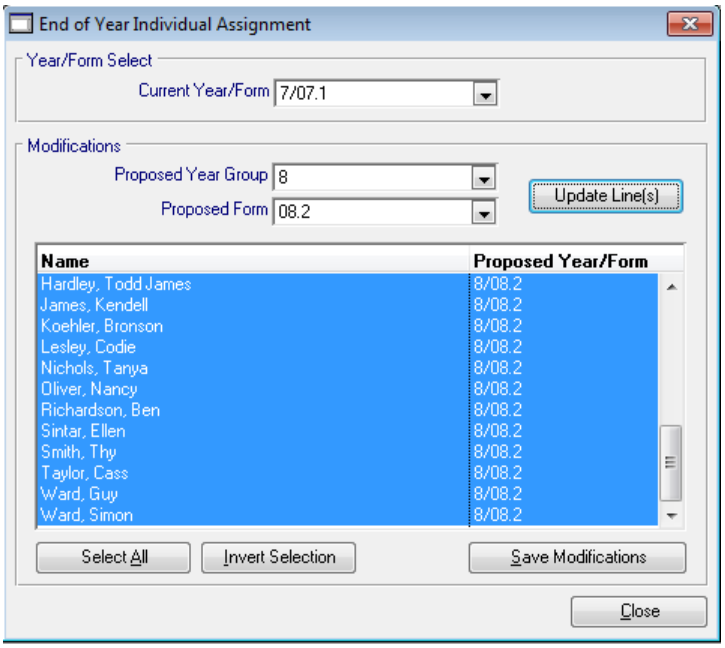


All of the *Year 7/07.1* students will go into *Form 8.2*



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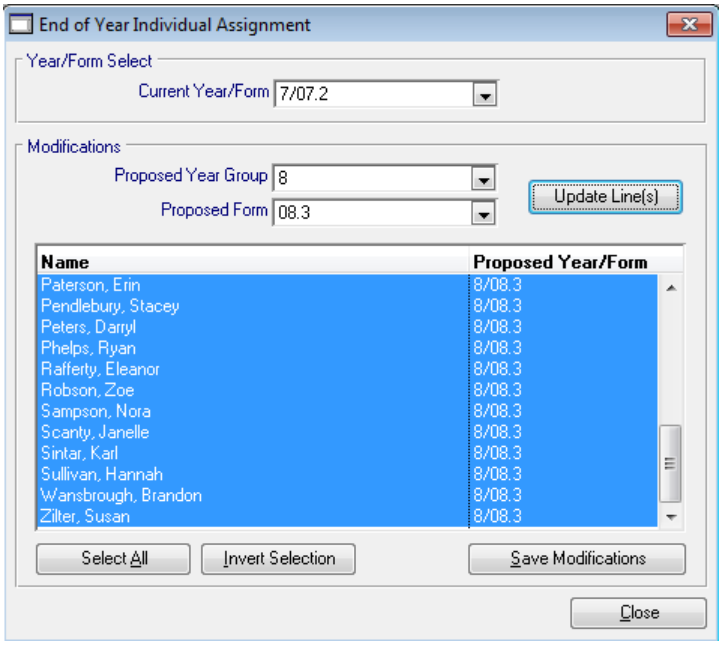
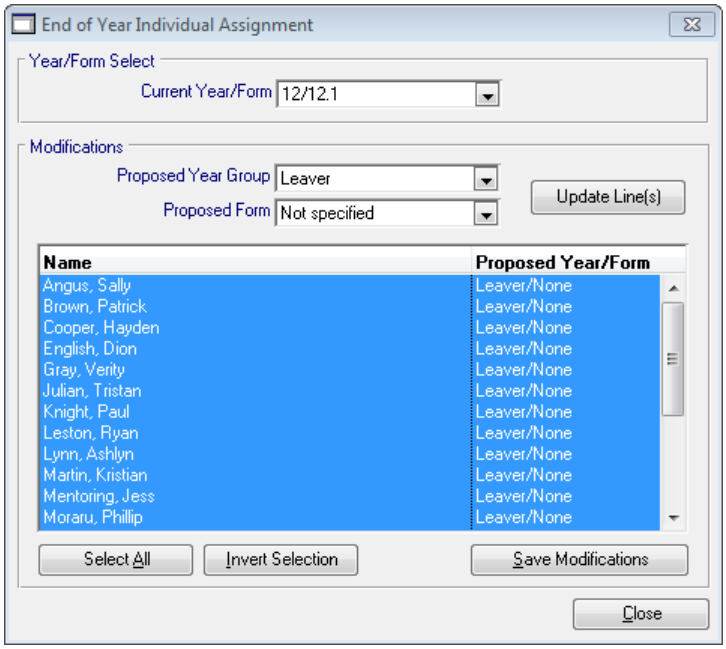
All of the *Year 7/07.2* students will go into *Form 8.3*



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



- ***Close*** the window

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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.

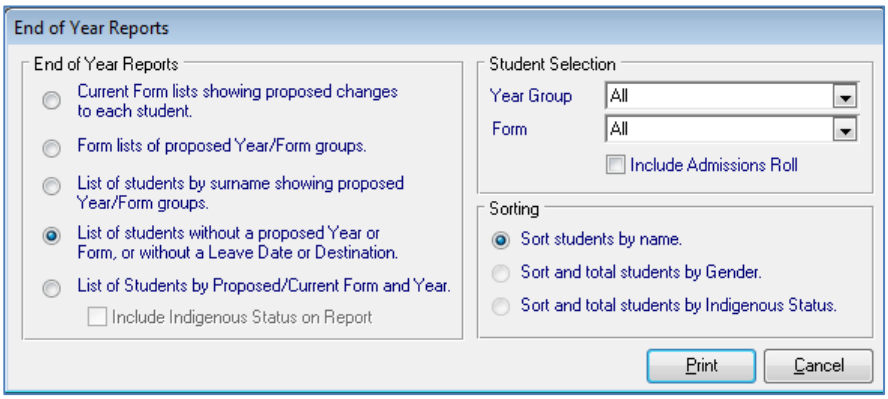
- ***Form Lists of Proposed Year/Form Groups*** will generate form lists for the new school year. These will be complete, apart from the Admissions Roll students. Do not use proposed Year and Proposed Form for students on the Admissions roll. Students on the Admissions Roll can also be included in reports 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



- ***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.

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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.

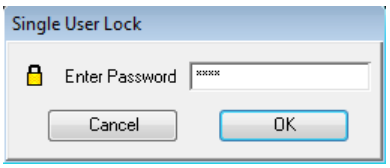
17.14 Process Year End

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.

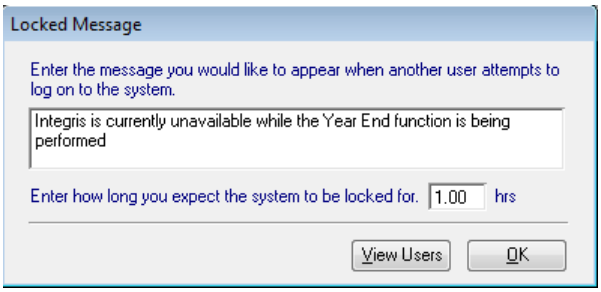
Processing Year End should only occur when you are ready to roll over your student data. This process can only be carried out in Single User Mode, that is, all users except the person performing the Year End process must be logged out of Integris.

Activity

File > Single User Lock



- Type your password and click ***OK***



- Click ***OK*** again

The Single User Lock is now activated.

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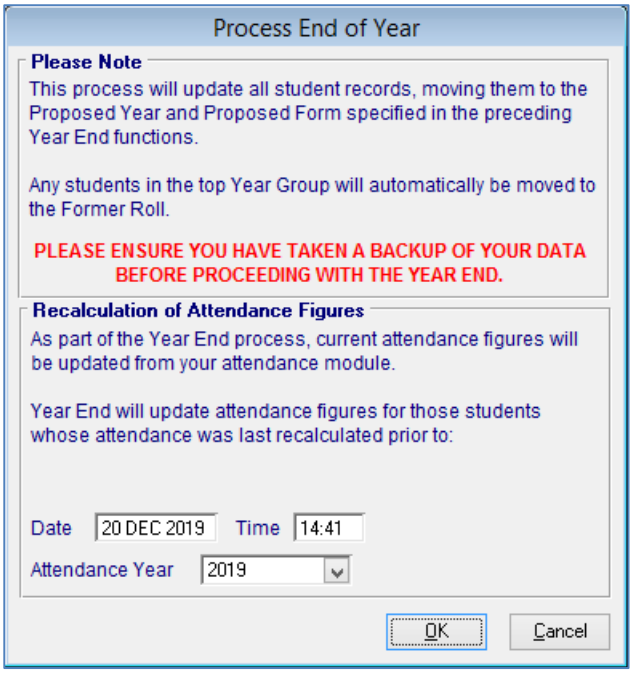
Admin > Year End > Process End of Year

- Click ***OK***



- 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).

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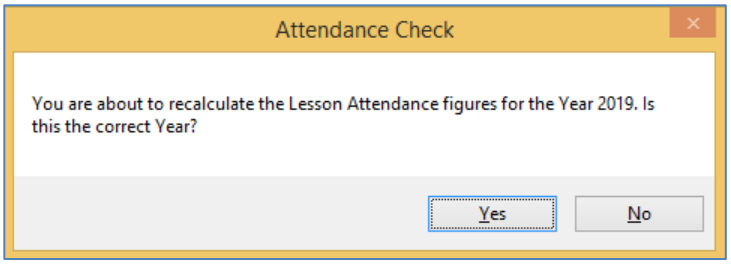
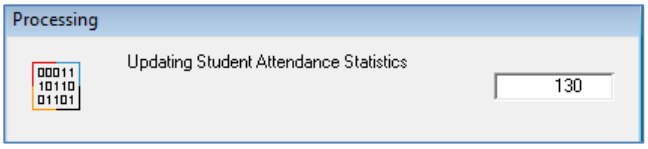
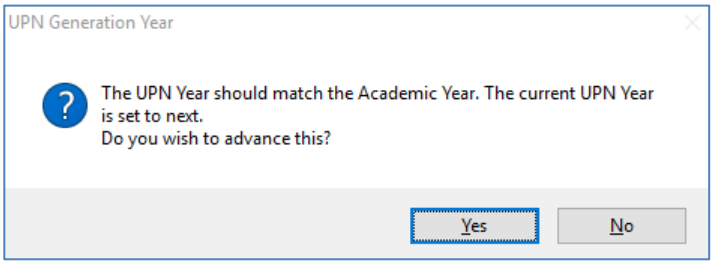


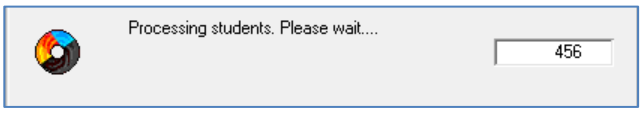
- Click ***Yes***



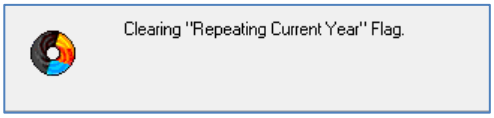
The UPN academic year is also incremented.



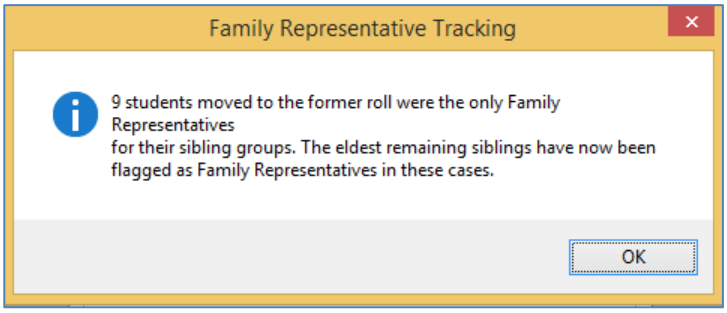
- Click ***Yes***



Student records are updated.



Family Representatives are updated.



- Click ***OK***.

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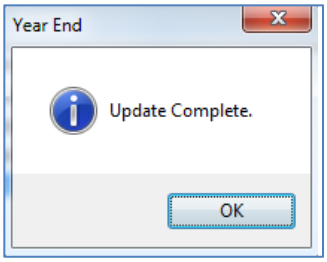
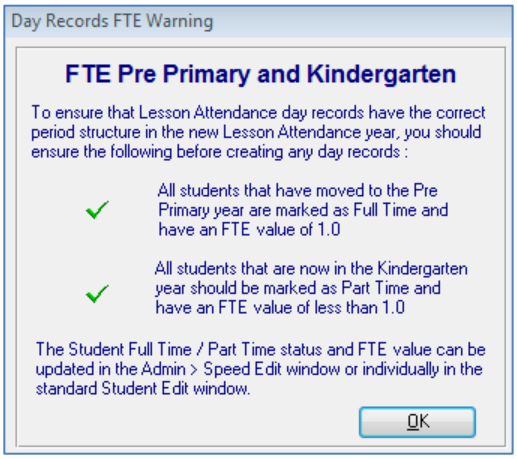


- Click ***OK***.



- Click ***OK***.

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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.

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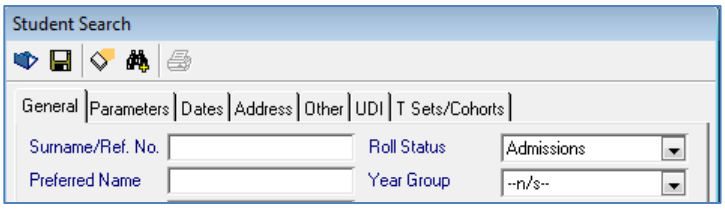
Activity

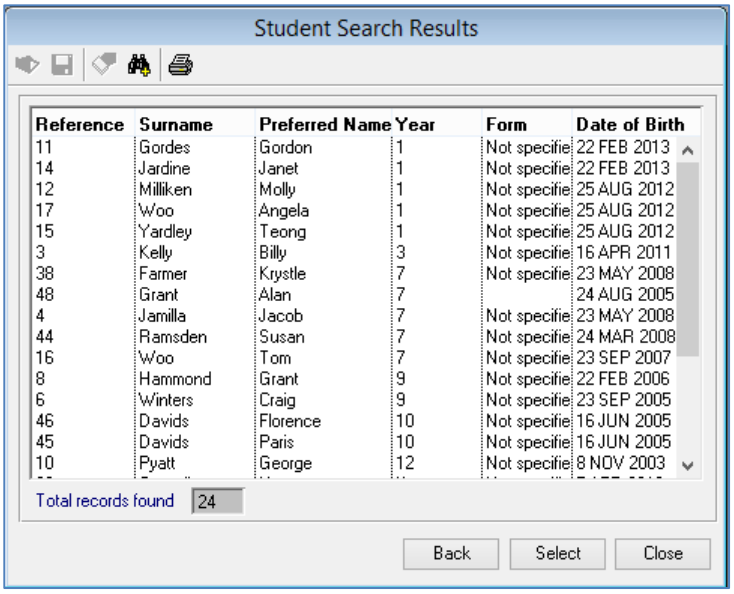
All students on the Admissions Roll have been accepted for 2020

Admin > Speed Edit

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



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



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

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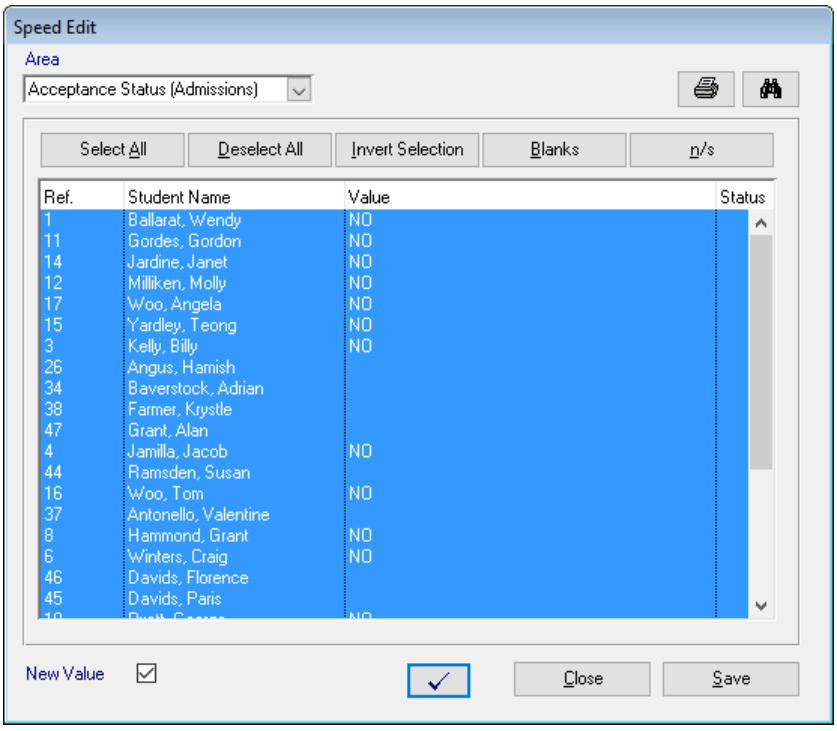
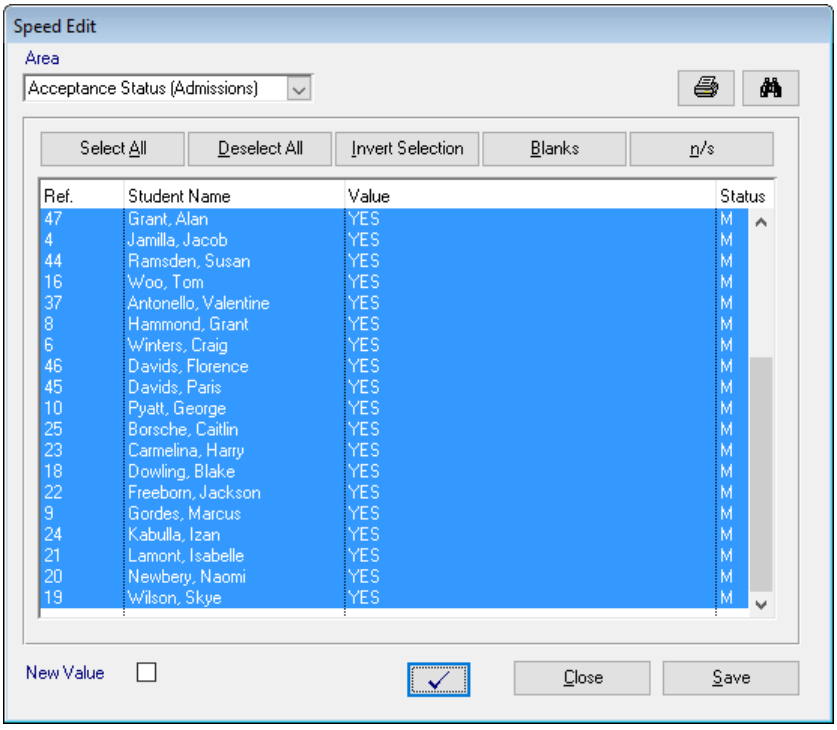
- Click ***Select All***



- Check the ***New Value*** box

- Click ***Apply Changes***



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

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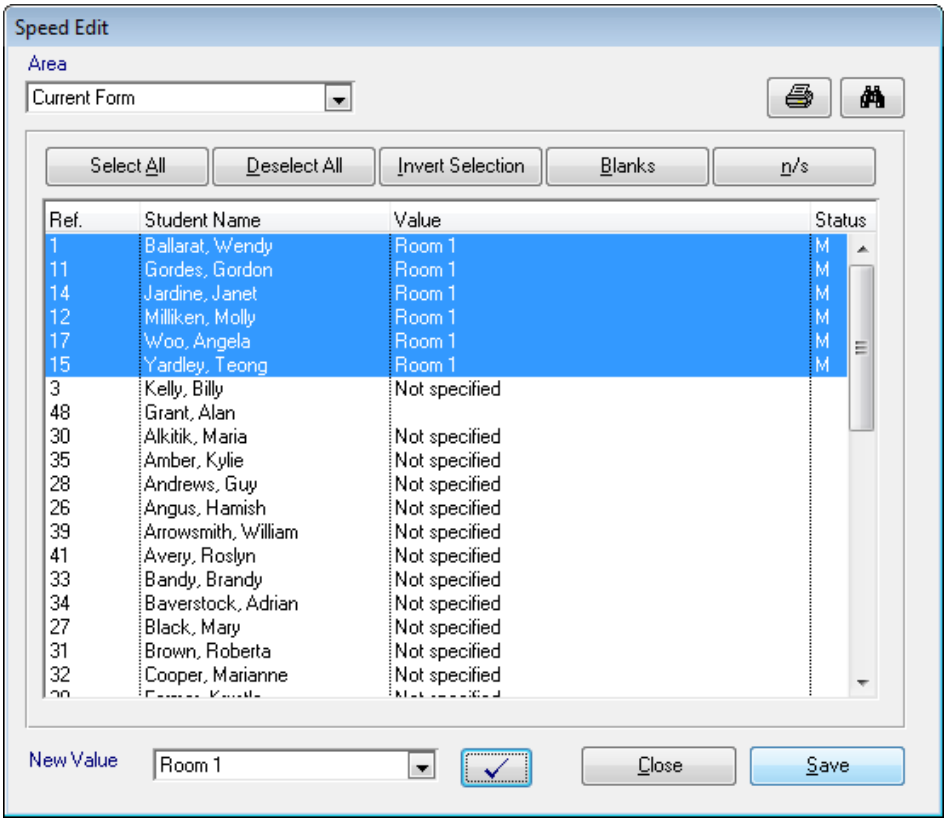
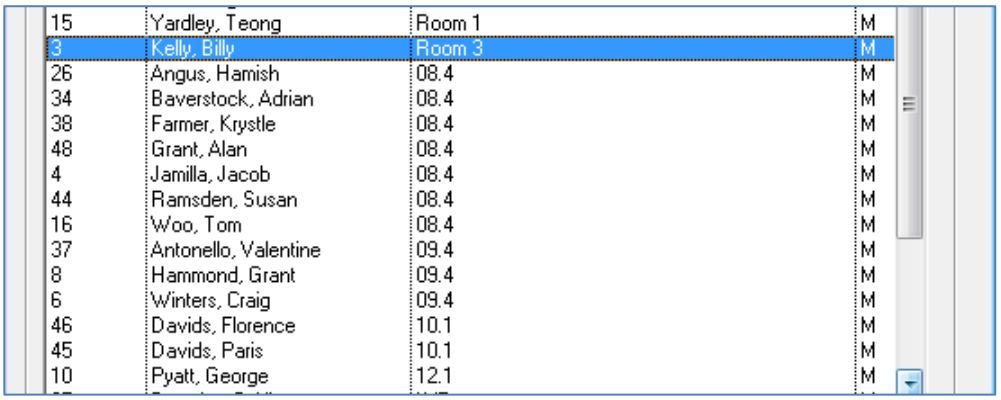
Allocate Admissions Students to Forms

Admin > Speed Edit

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



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



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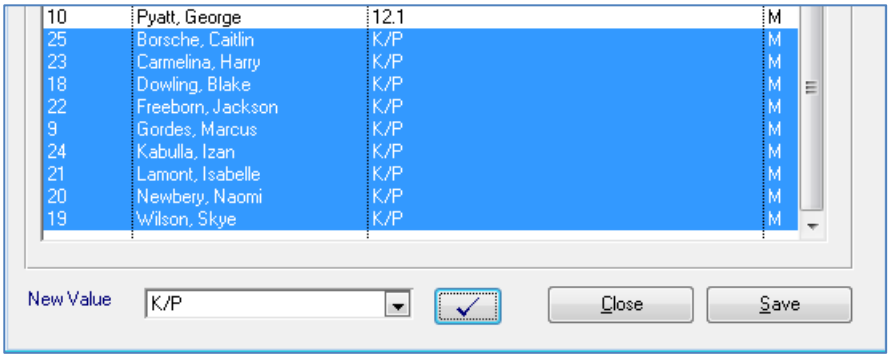
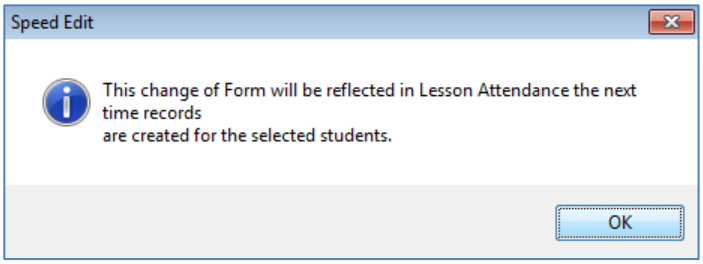


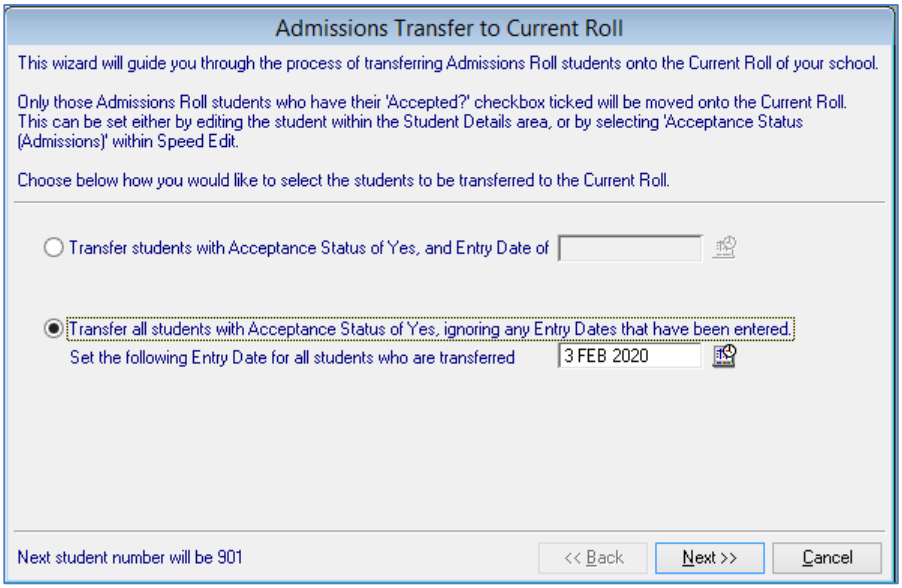
- Click ***Save and Yes,***



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

Move Admissions Students to the Current Roll

Admin > Utilities > Admissions Transfer → Current Roll



- Select the second option
- Enter the ***Entry Date for the beginning of Next Year***
- Click ***Next***

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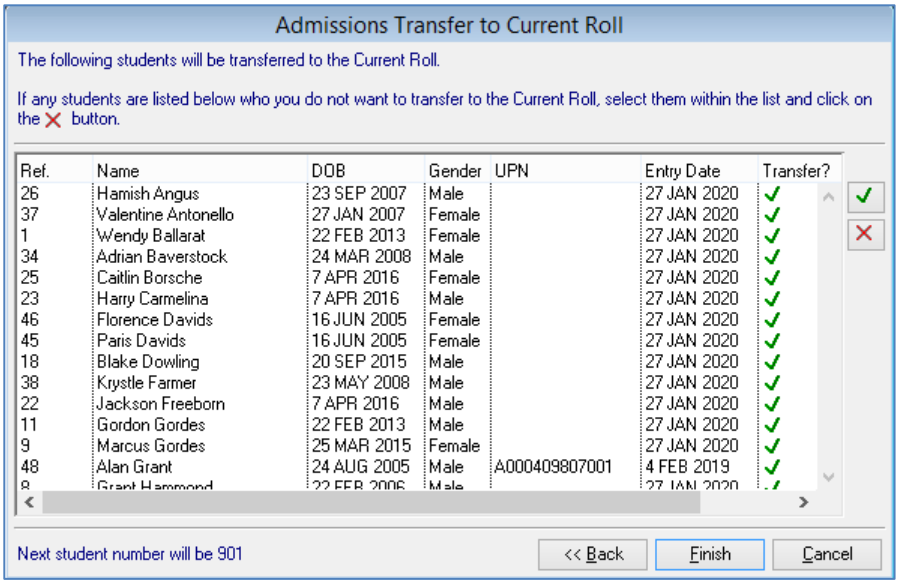

- Click ***Finish*** and ***OK***
- When prompted to check for empty batches, click ***Yes***

- Delete any empty batches
- Close Administration Utilities

Restore Multi-user

- Click Single User Mode
- Choose ***Restore Multi-user***
- Enter your password and click ***OK***

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17.17 Moving External Roll Students to the Former Roll

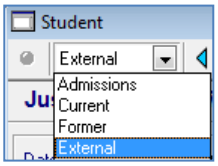
All students on the External Roll who are not returning to the school in 2016, should be moved to the Former Roll using the utility ***Admin > Utilities > External Roll to Former Roll***

Edit existing External Roll Students and add a Leave Date.

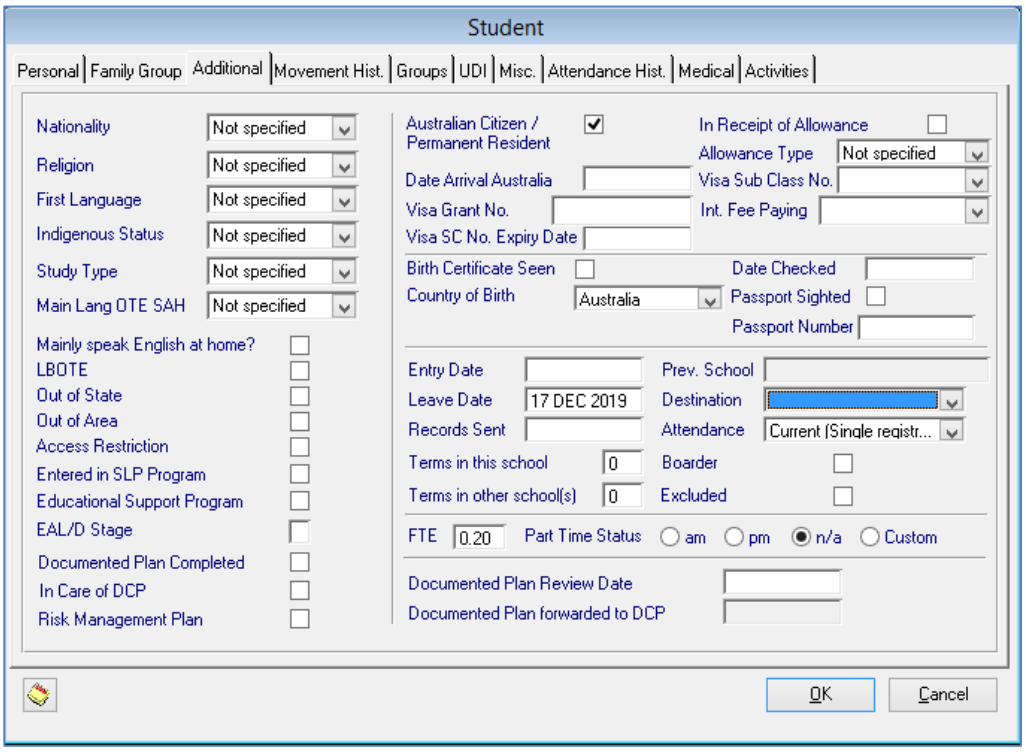
Activity

General > Student Details

- Select the External Roll



- Find Justin Badely
- Click the *Edit*
- Click on the Additional tab



- Add a **Leave Date**
- Click **OK**

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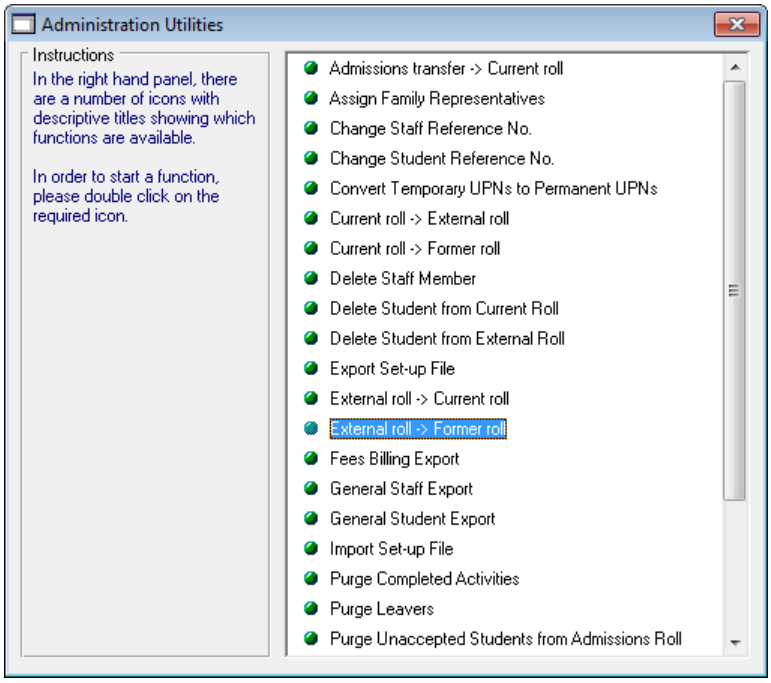
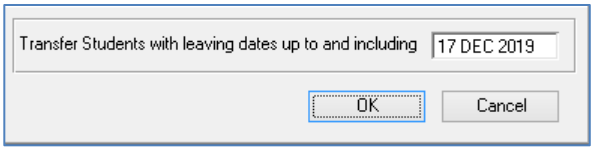
Run the External Roll to Former Roll Utility

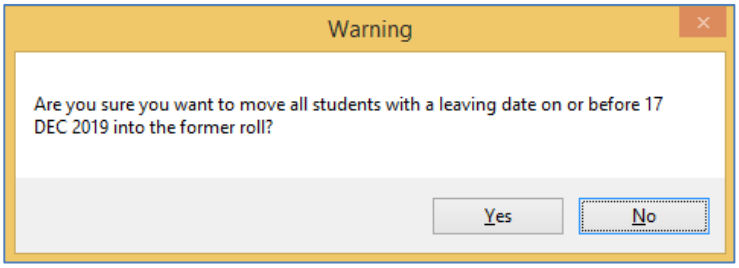
Admin > Utilities > External Roll to Former Roll



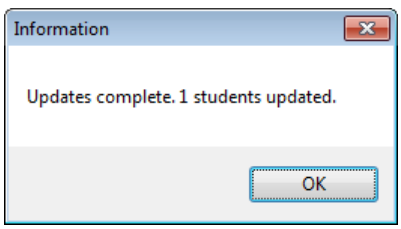
- Double Click on the Utility
- Enter the Leave Date and Click **OK**



- Click **Yes** to the Warning message



- Click **Yes** if prompted to remove students from their groups
- Click **OK** to the Updates Complete message



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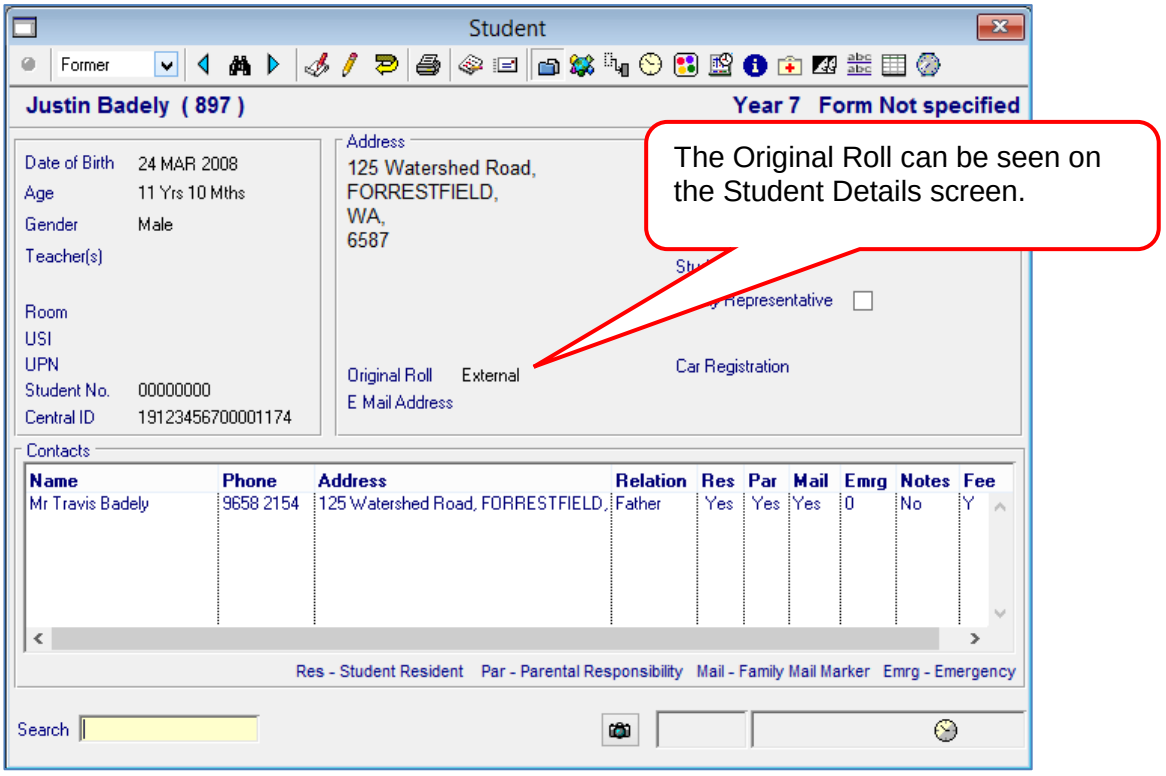
View the Student on the Former Roll

General > Student Details



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17.18 Changing Student's FTE

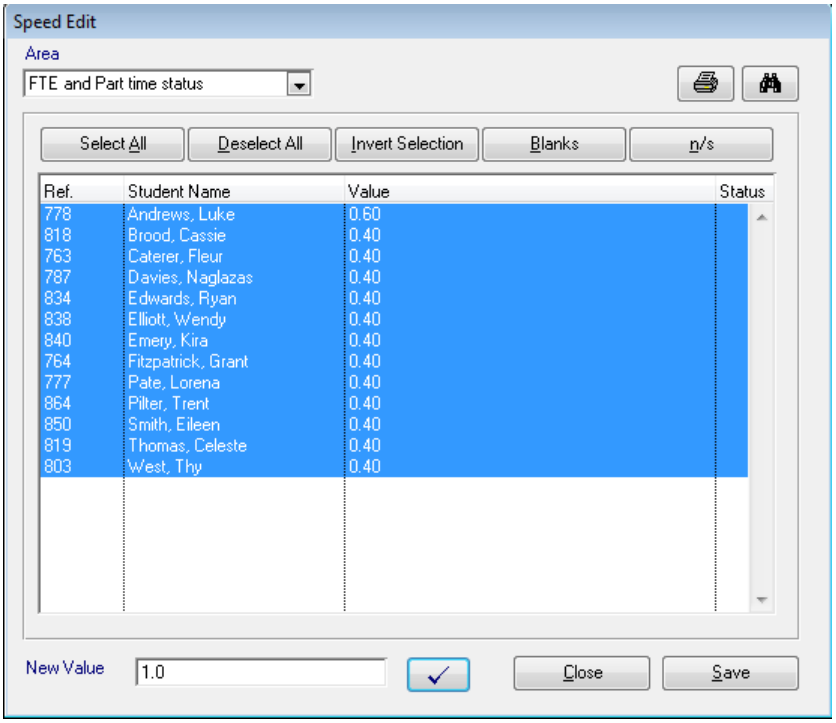
Some students will need to have their FTE altered to reflect their correct attendance at school. This will affect both Lesson Attendance and the Census.

Activity

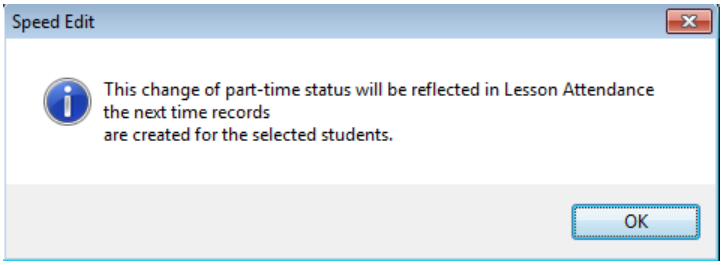
Admin > Speed Edit

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***



- Click Apply Changes
- Click ***Save***



- Click ***OK*** and ***Yes***

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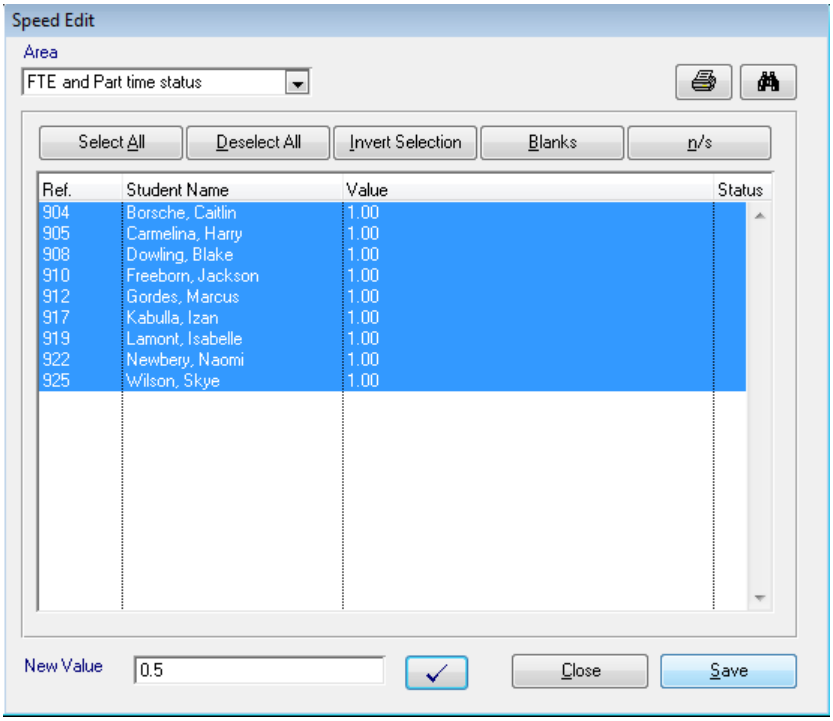
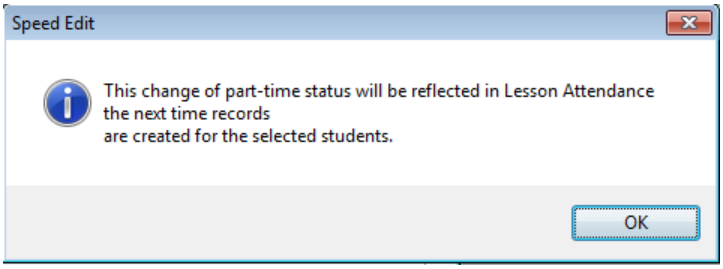
Decreasing the FTE

- Find the students in ***Year Group K***
- Click ***Select All***
- Enter a ***New Value*** of ***0.5***



- Click Apply Changes
- Click ***Save***



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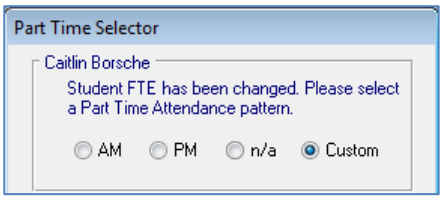
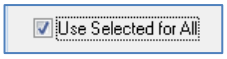
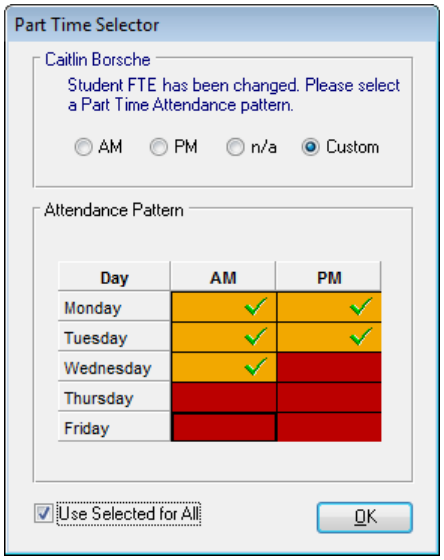
When a student's FTE is set to less than 1.0, a ***Part Time Selector*** window will be displayed.

- Select the **Custom** radio button



- Deselect all of the Thursday and Friday sessions and the Wednesday ***PM*** session
- Check ***Use Selected for All*** 



- 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

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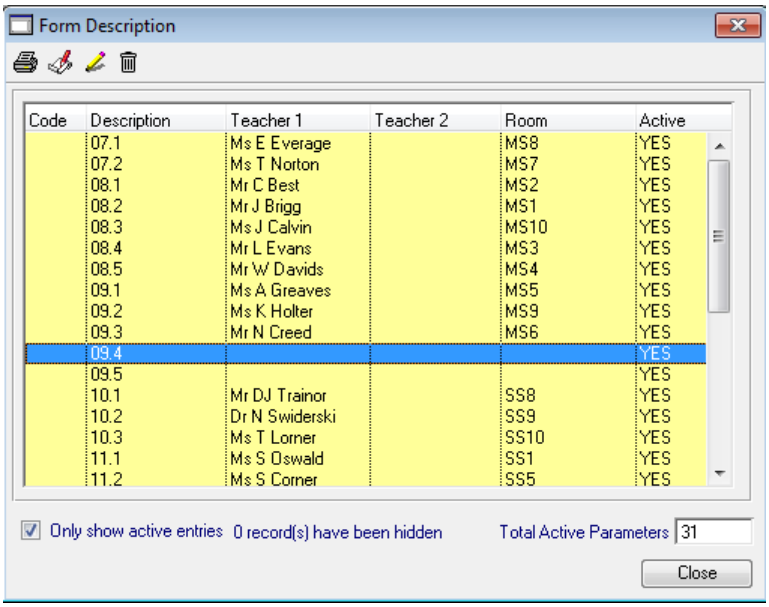
17.20 Update Form Descriptions

Once staff members have been added in Staff Details, they can be assigned Forms and Rooms

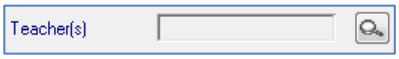
Activity

General > Parameters > Form Description

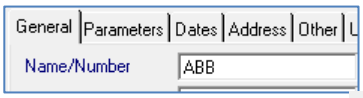
- Select the ***Form 9.4***



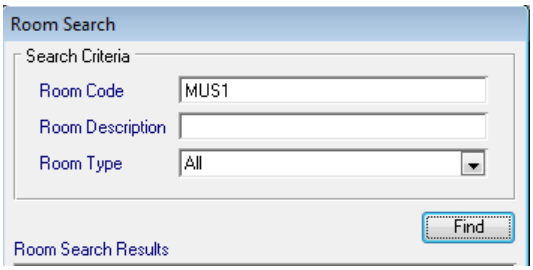
- Click ***Edit***
- Click Find Form Teacher



- Type ***ABB*** in the **Name/Number** field and click **Find**



- Click Find Form Room
- Type ***MUS1*** in the Room Code and click ***Find***



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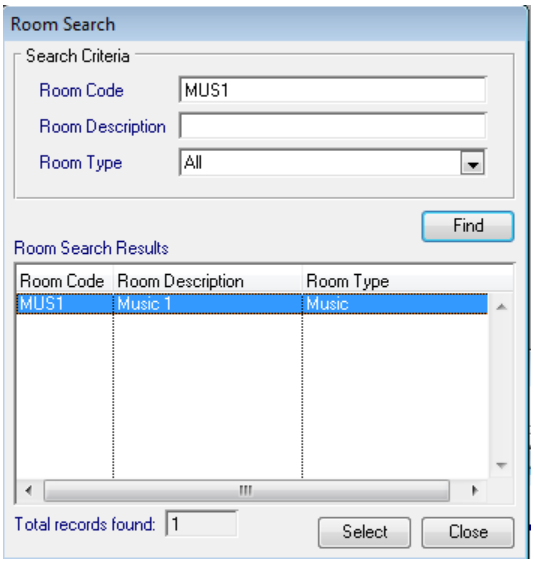
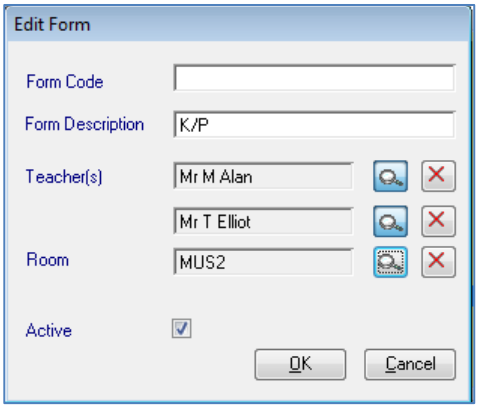
- Highlight ***MUS1***



- 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***



- Click ***OK***

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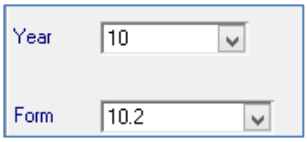
17.21 Repeating Students

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

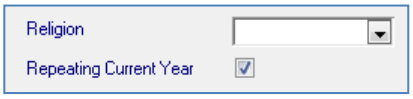
General > Student Details

- Use Search to load ***Abrey Stewart's*** records
- Click Edit
- Change his Year back to ***Year 10*** and ***Form 10.2***



- Select Miscellaneous tab

- Check ***Repeating Current Year***



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

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17.22 Assign Family Representatives

Admin > Utilities > Assign Family Representatives

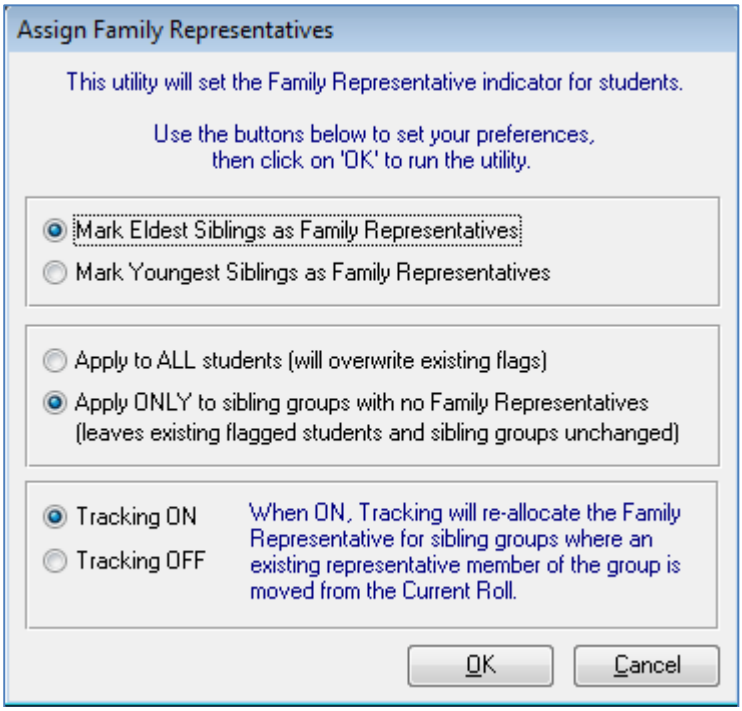
Family Representative flags a student as being the one who, for example, is given newsletters on behalf of a family. The field differs from the Family Mail Marker in that the field is attached to the student, rather than to the student contacts.

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.



Press ***OK*** to run the function.

Note: This function needs to be run in Single User mode.

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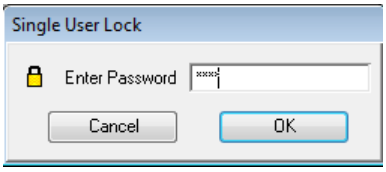
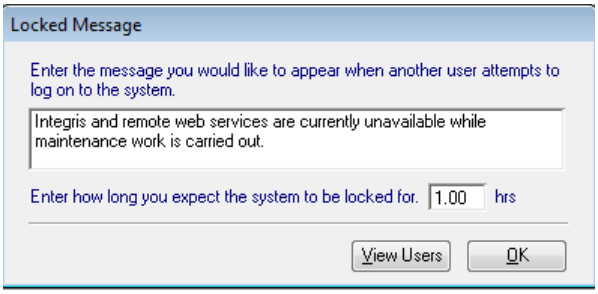
Activity

File > Single User Lock



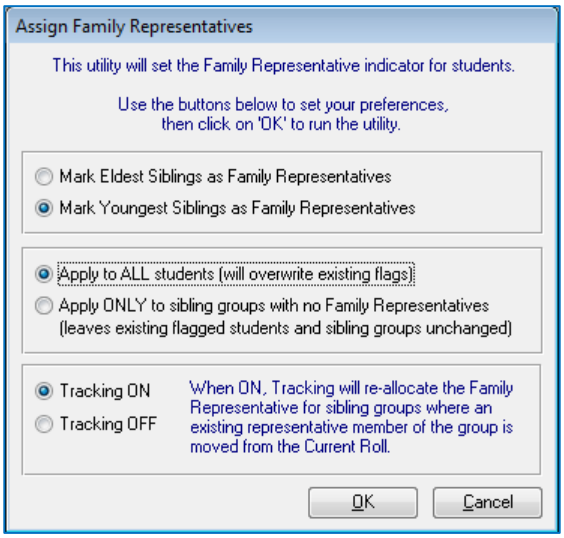
- Enter ***keys*** and click ***OK***



- Click ***OK*** again

Admin > Utilities > Assign Family Representatives

- Select ***Mark Youngest Siblings as Family Representatives***
- Select ***Apply to ALL Students***
- Leave ***Tracking ON***



- Click ***OK***

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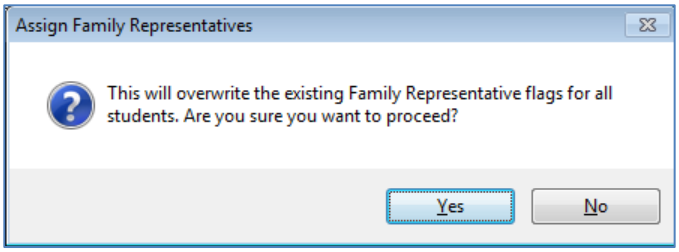
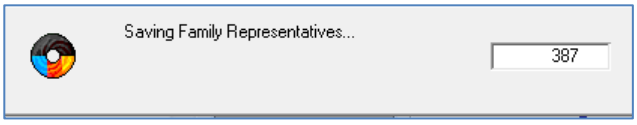
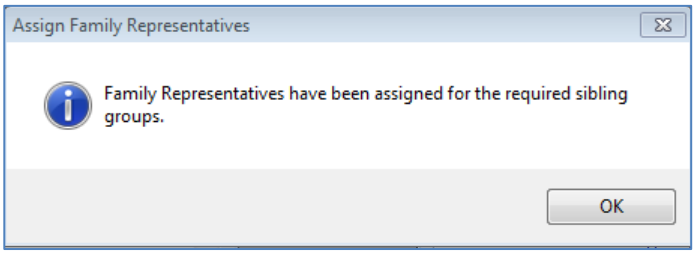


- Click ***Yes***





- Click ***OK***
- Close Administration Utilities

- Click the Locked in Single User Mode icon
- Click ***Restore Multi-user***
- Enter ***keys*** and click ***OK***

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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.

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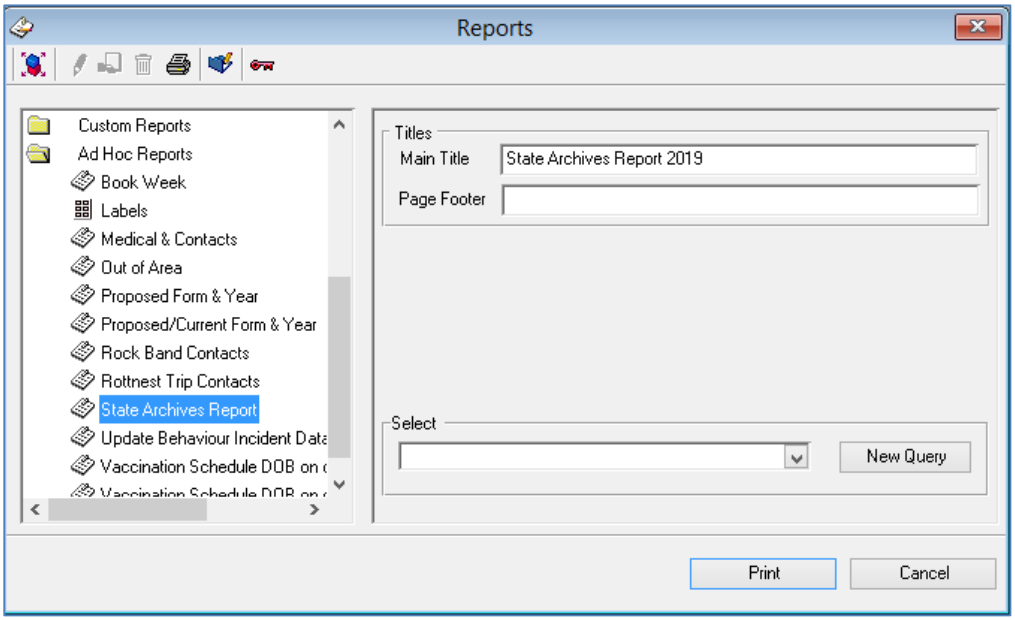
Activity

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.

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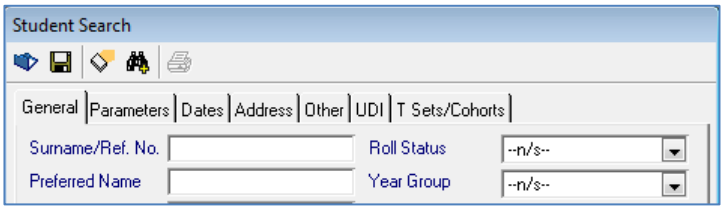
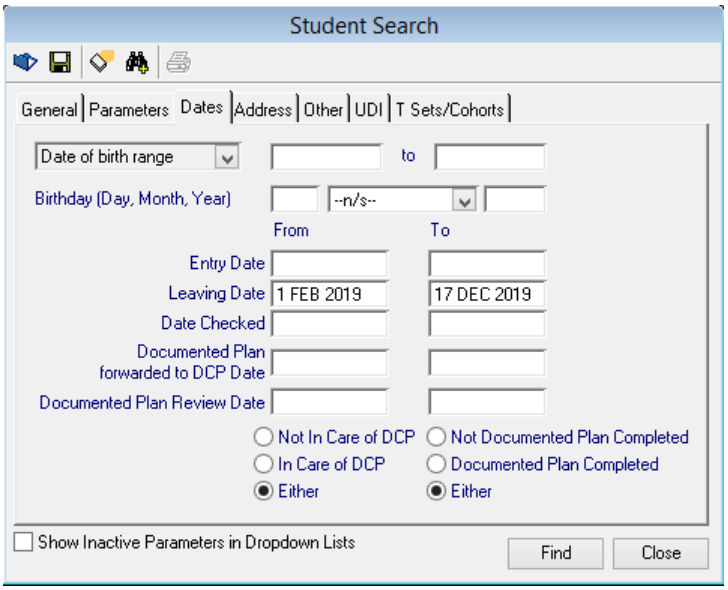
- Click ***New Query*** to find the students with the ***Roll Status*** of ***n/s***



- 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)

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17.25 Notification of Enrolment

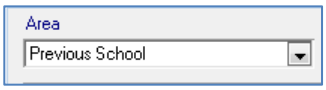
Schools are reminded that they must provide written or electronic notification of the date an enrolment commences to the school where the new student was previously enrolled. This includes Primary schools when students are enrolling in Secondary school for the first time.

Activity:

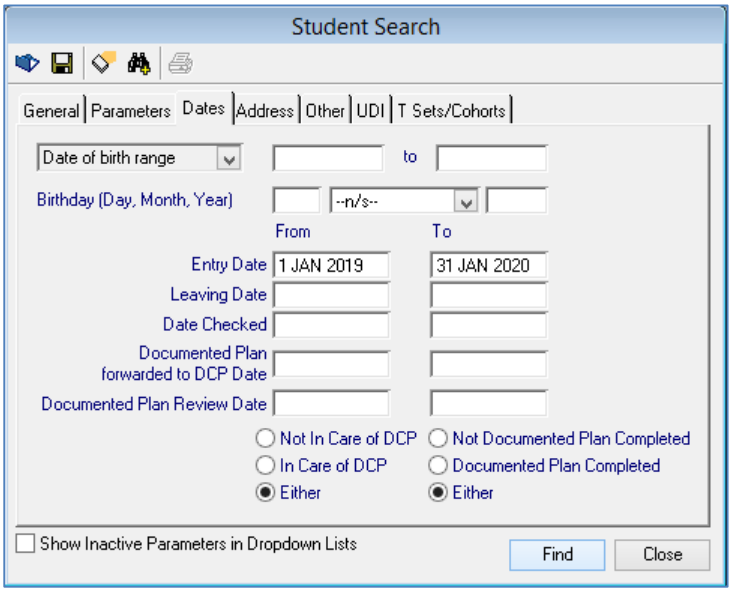
Admin > Speed Edit

Confirming Enrolment to the Previous School

- Select ***Previous School*** from the ***Area*** drop-down menu



- 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***



- 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.

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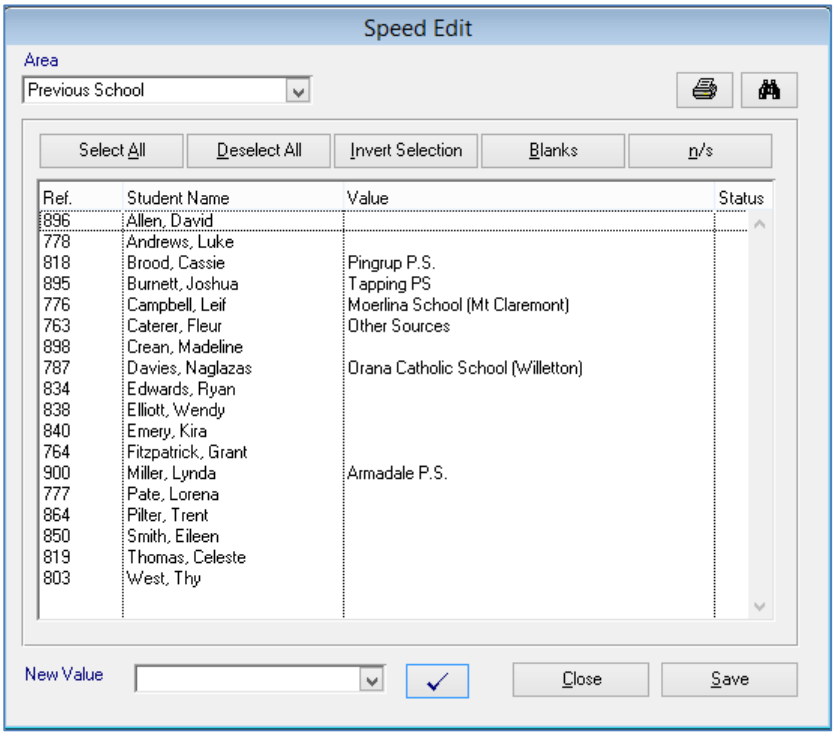
- Click on the ***Value*** header and scroll to check the list



- 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.

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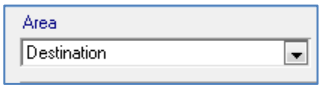
17.26 Checking Student's Destination School

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.

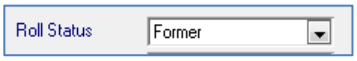
Activity

Admin >Speed Edit

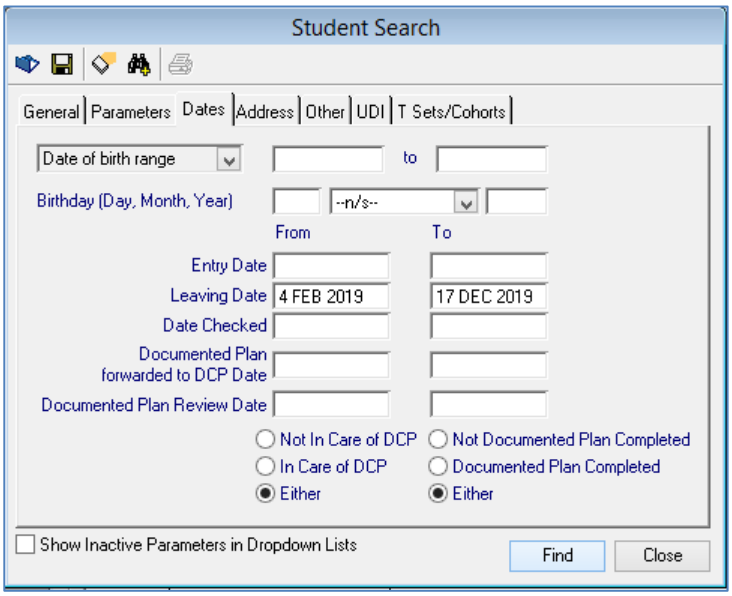
- Select ***Destination*** from the ***Area*** drop-down menu



- Click to find the students on the ***Former*** roll



- Click the ***Dates*** tab and enter a ***Leaving Date*** range of ***04/02/19*** to ***17/12/19***



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

A list of students and their destination school will be displayed

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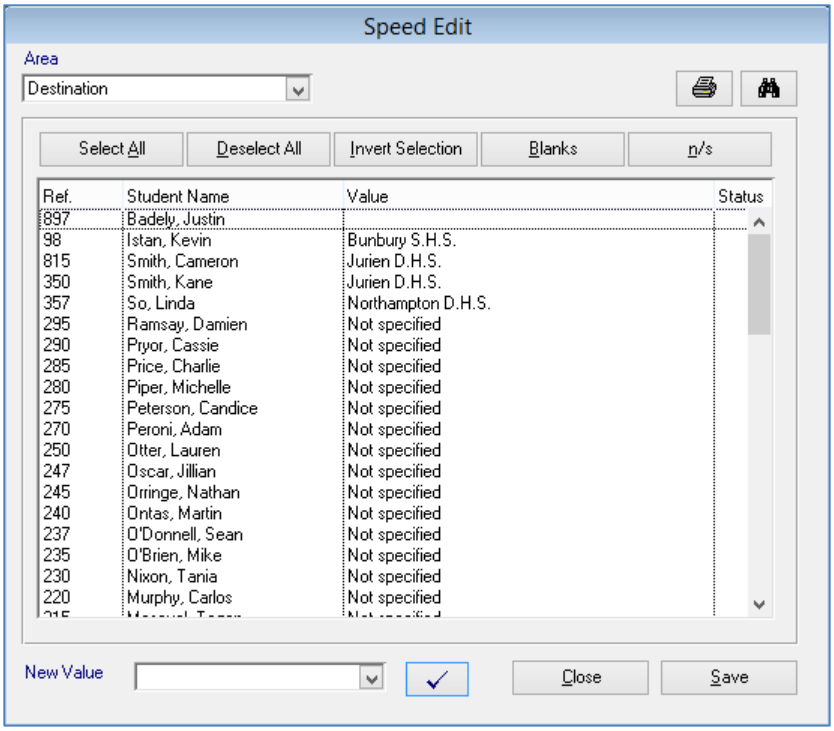

- To print the list, select the printer icon

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

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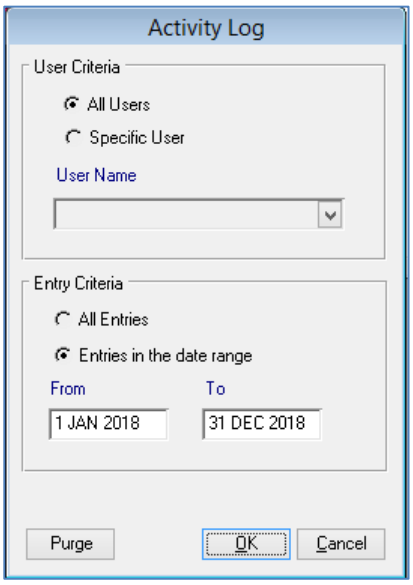
17.27 Purge the Audit Trail

Activity

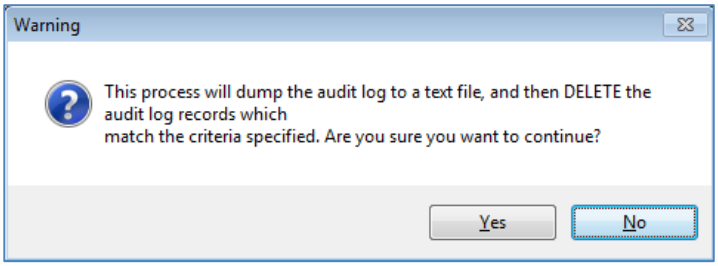
General > Control > Audit

- Select ***All Users*** and ***Entries*** in the date range.
- Enter the last day of the year prior to the previous calendar year

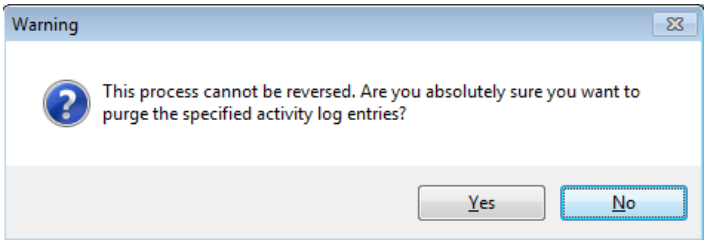
Note: Schools are requested to keep the Activity Log for all entries in the previous year



- Click ***Purge***



- Click ***Yes***



- Click ***Yes***
- Save to **C\Keys\Integris\Outbox** with the file name: ***2018 Audit Log***

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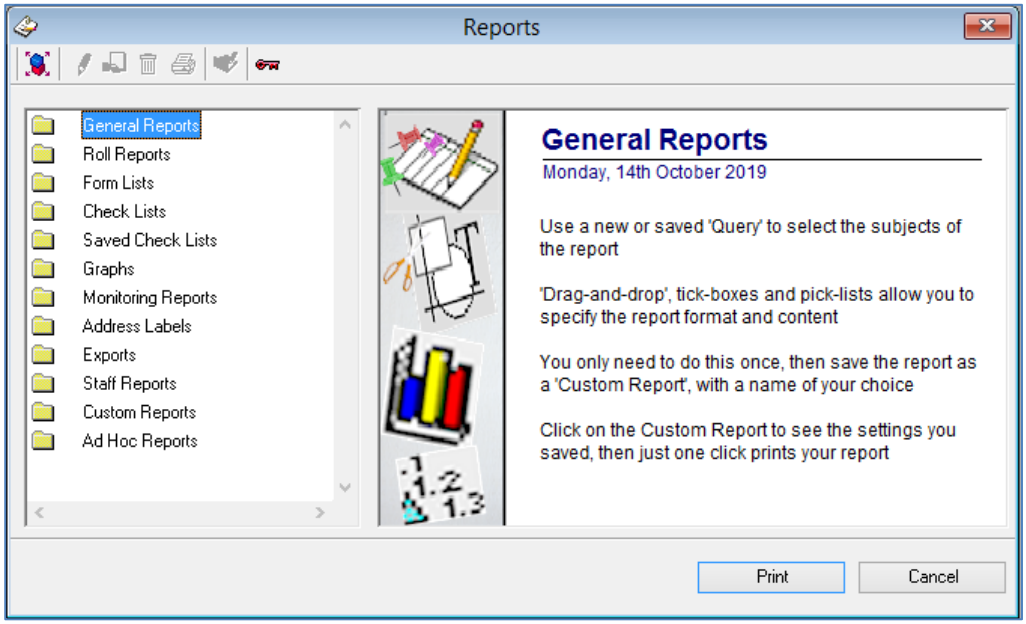
18 Reports

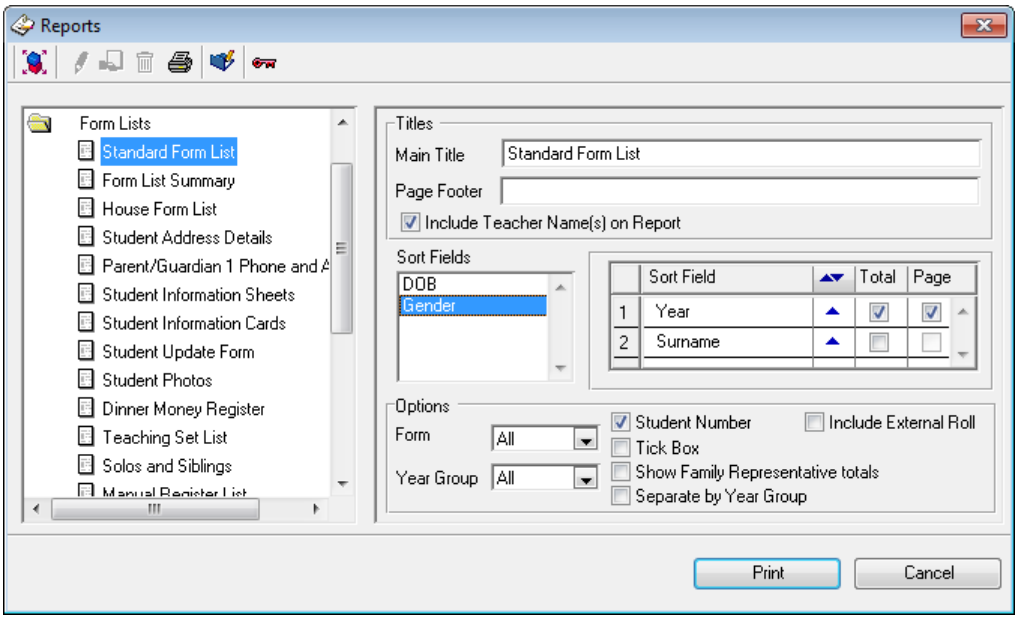
18.1 Standard Reports

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.

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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.

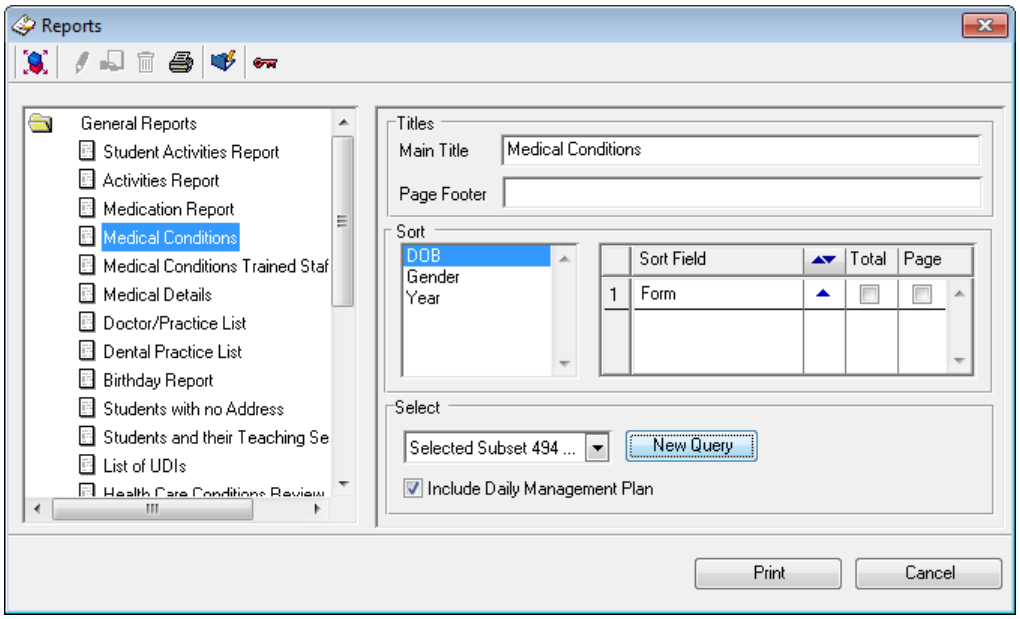
To expand the whole of the reports tree at once, click on Expand Tree.

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



- Click Print

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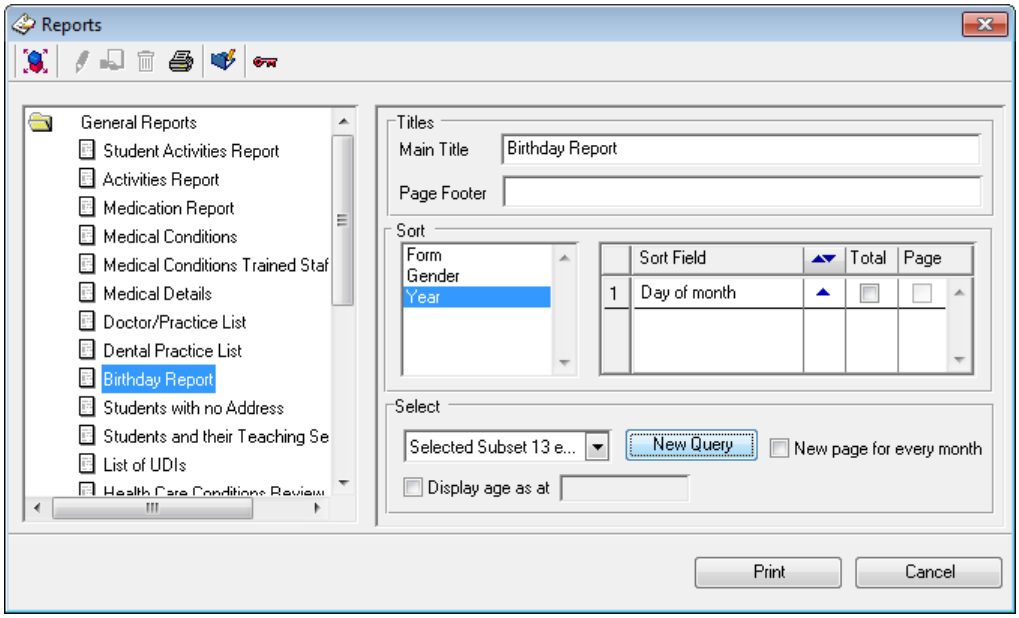
Admin > Reports > General Reports > Birthday Report

- Click ***New Query***, find the ***Year 7*** students
- Sort by ***Day of month***
- ***Print*** to the screen



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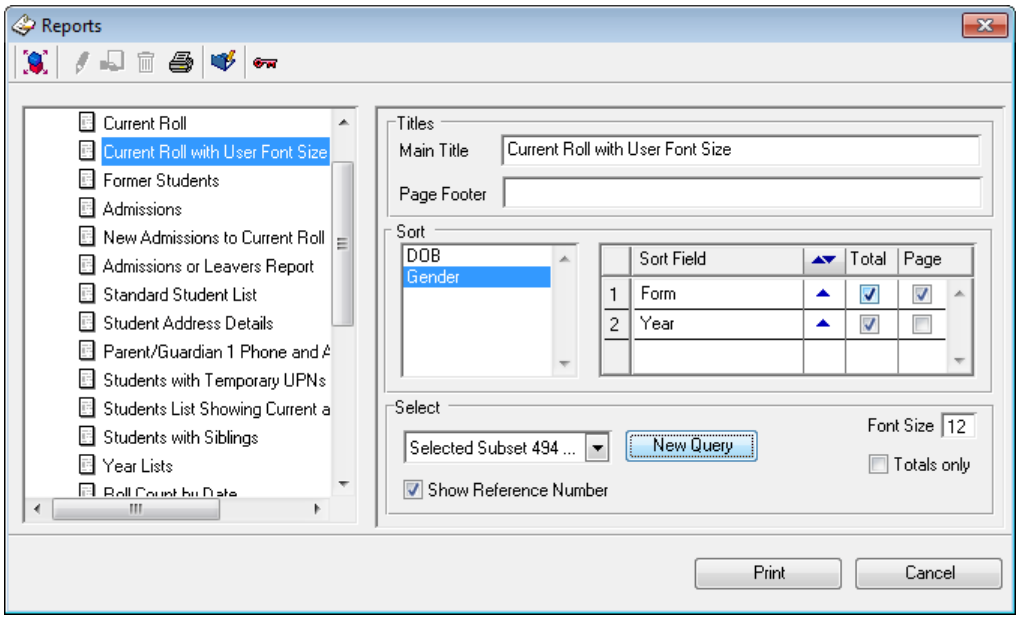
18.1.2 Roll Reports

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



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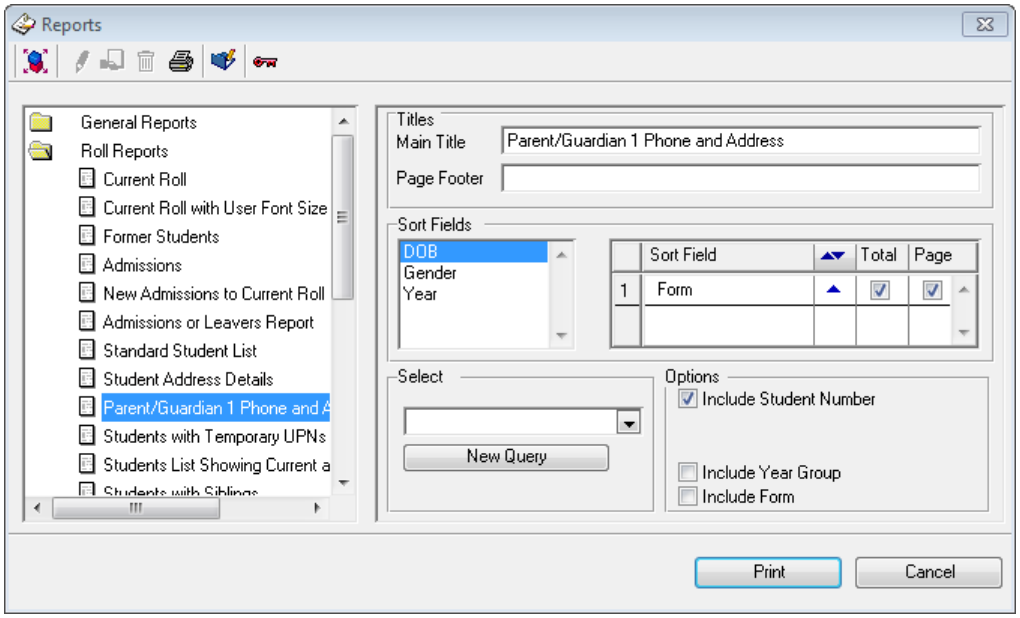
Admin > Reports > Roll Reports > Parent/Guardian 1 Phone and Address

- Sort by ***Form***
- Tick ***Total*** and ***Page*** for Form
- Select all students on the Current Roll
- Click ***Print***



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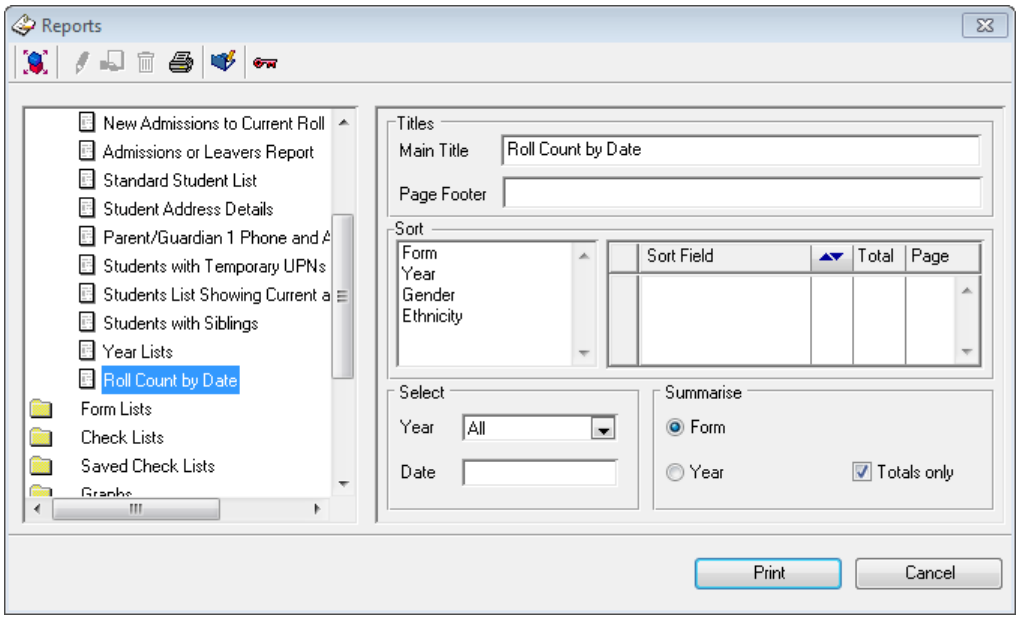
Admin > Reports > Roll Reports > Roll Count by Date

- Type today's date
- Click ***Print***
- Re-Print for Year Levels
- Check the box for Totals Only
- Click ***Print***



Note: This report is best run for the Current Year only.

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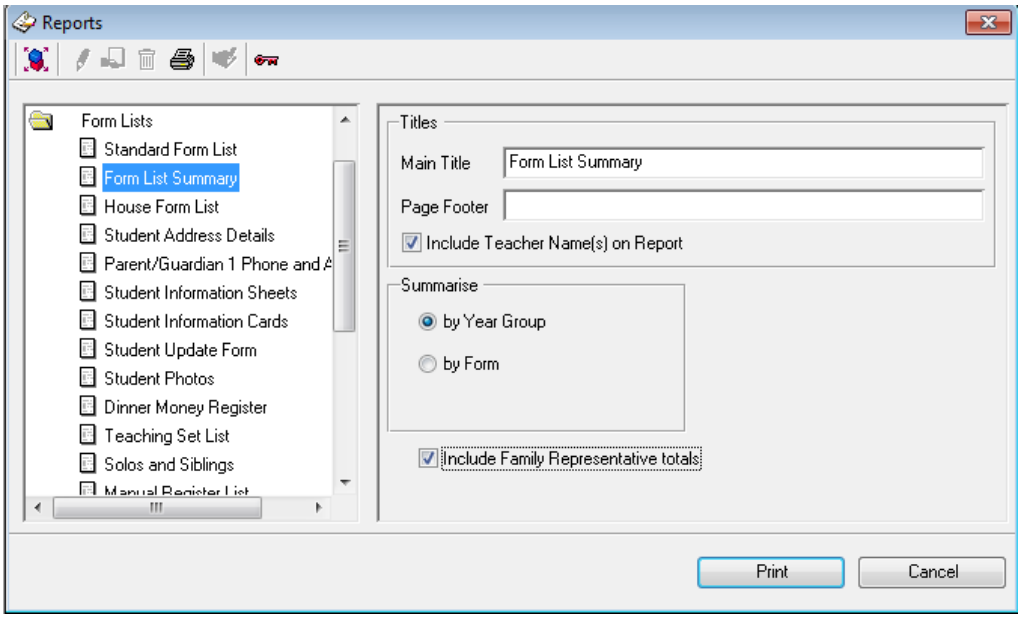
18.1.3 Form Lists

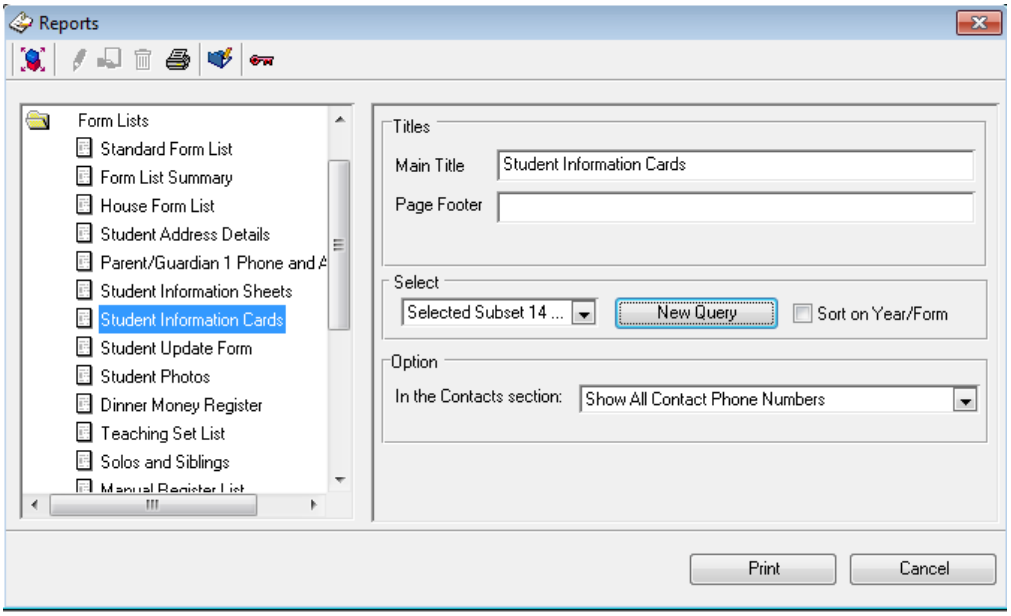
Admin > Reports > Form Lists > Form List Summary

- 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



Admin > Reports > Form Lists > Student Information Card

- Click ***New Query***, find the ***Year 6*** students



- Click ***Print***

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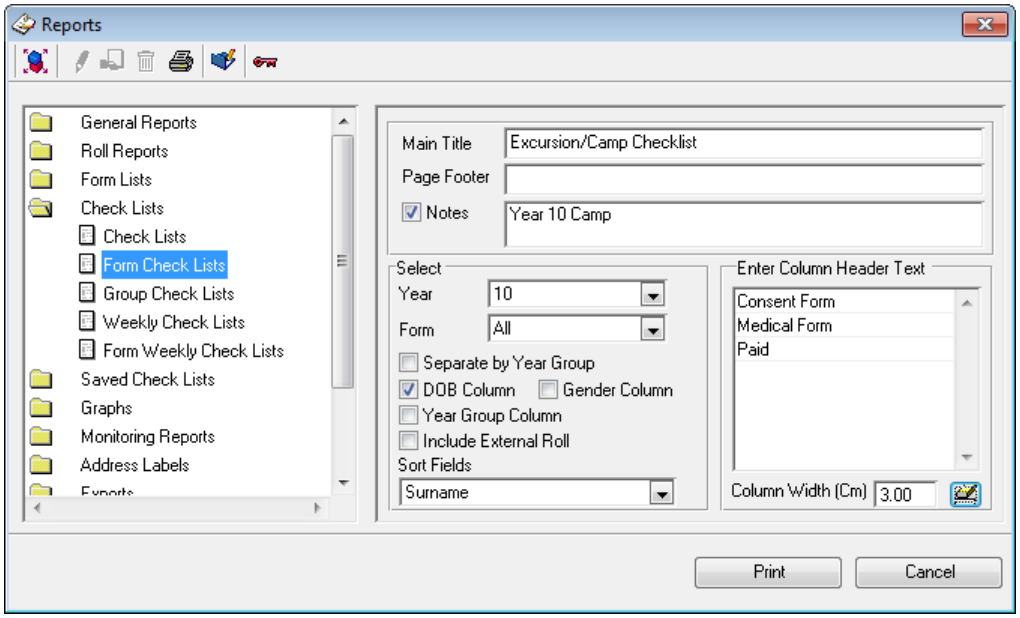
18.1.4 Check Lists

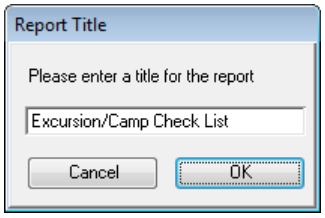
Admin > Reports > Check Lists > Form Check List

- 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***



- ***Print*** to the screen

- Click Save as Custom Report
- Give your checklist a name and click ***OK***



- Click Allow Custom Report to be used by others

Note: Once a report has been shared, it cannot be unshared.

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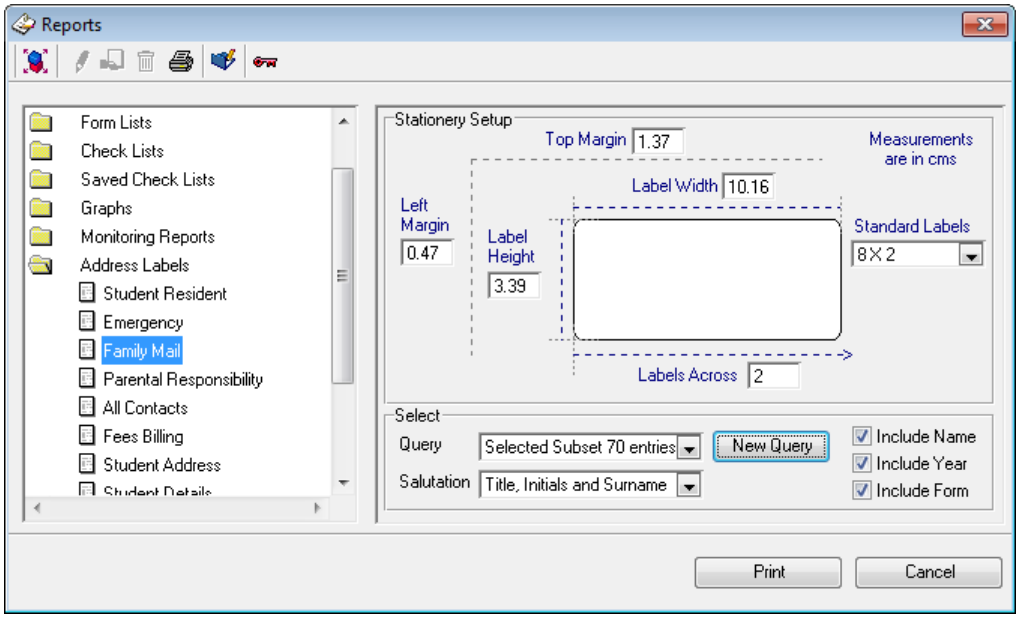
18.1.5 Address Labels

Admin > Reports > Address Labels > Family Mail

- Select ***Standard Labels 8x2***
- Use ***New Query*** to find ***Year Group 10***



- ***Print*** to the screen

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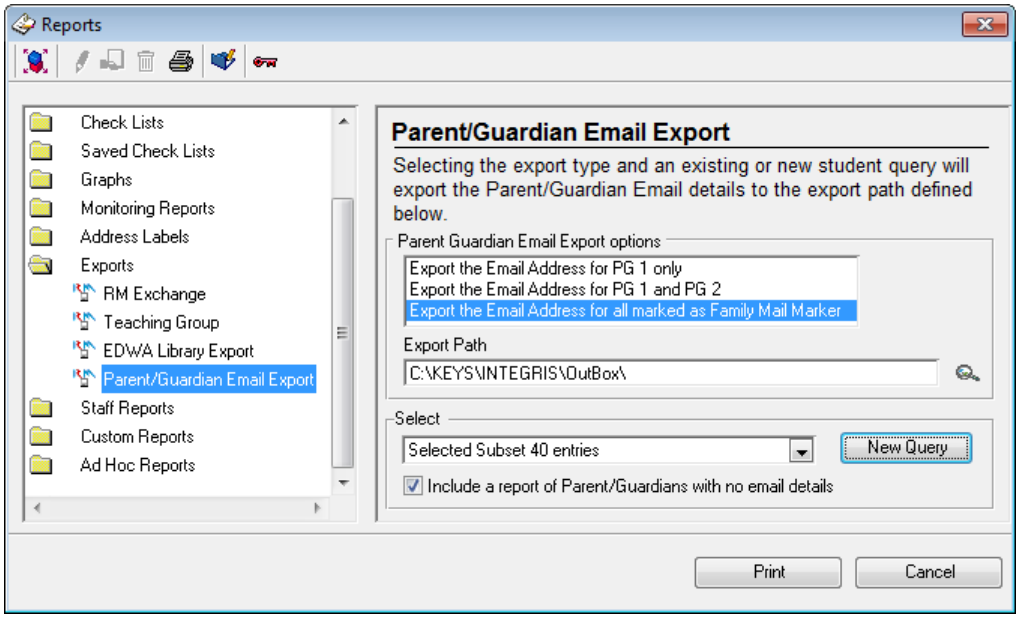
18.1.6 Exports

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)

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18.2 WA Reports

The WA Reports module has been specified by the WA Department of Education. These reports provide schools with additional standard reports.

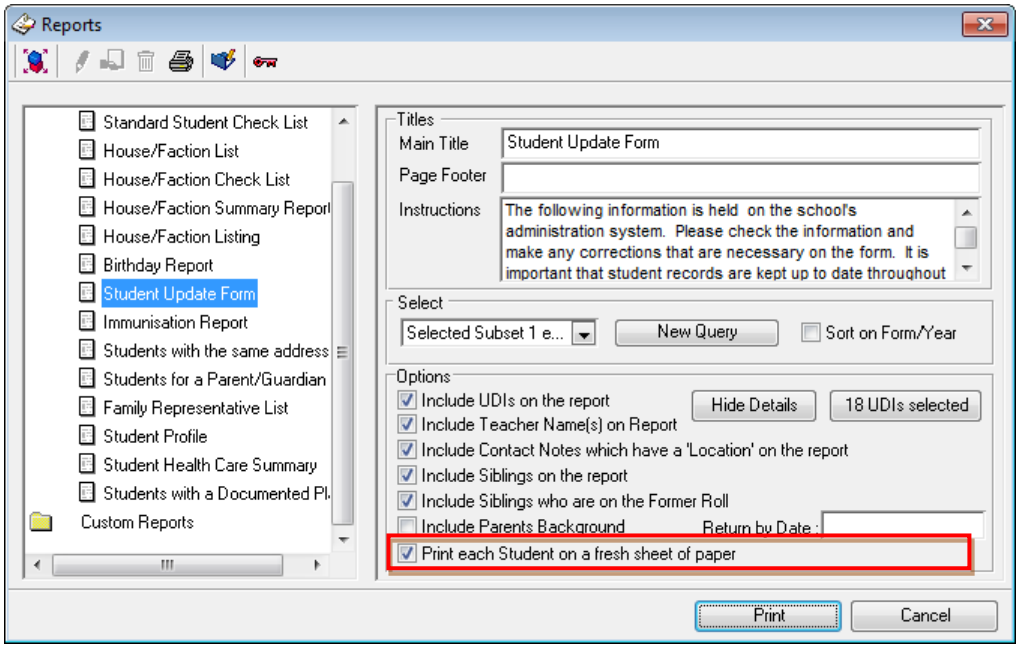
WA Reports can be accessed from the Sidebar or from the Student Profile Icon

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



Note: Reports for each student may now be started on a new page

- ***Print*** the report to screen
- View and close the report

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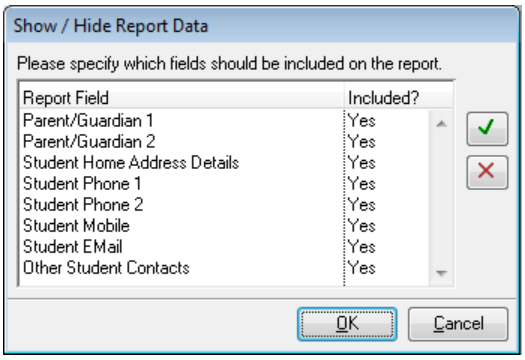
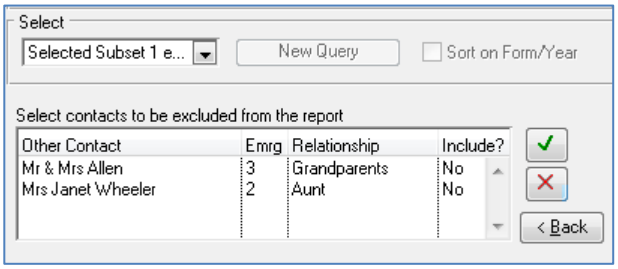
We can run this report again but this time we can now hide some details from the Update form.

- Click on Hide Details
- Select some details to hide including Other Student Contacts and click on the cross



- Click on Other Contacts and select a contact to display and click on the tick



- Click ***OK*** and then ***Print*** to run the report again
- Check that these details have been removed from the report.

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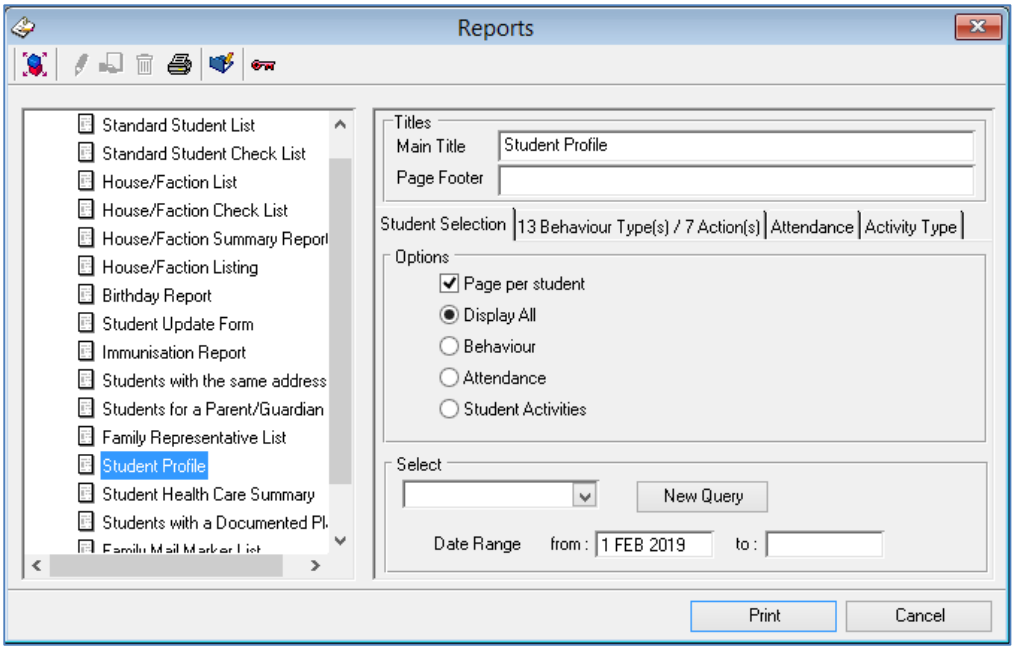
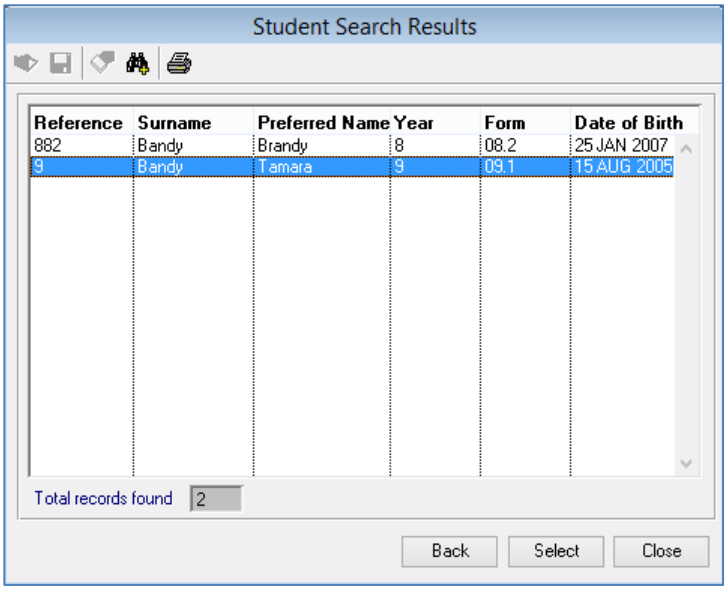
WA Reports > Reports > WA Reports >Student Profile Report

- 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.



- Enter the dates as ***1 Feb 2019*** to today's date
- Click on ***New Query***
- Find ***Tamara Bandy***



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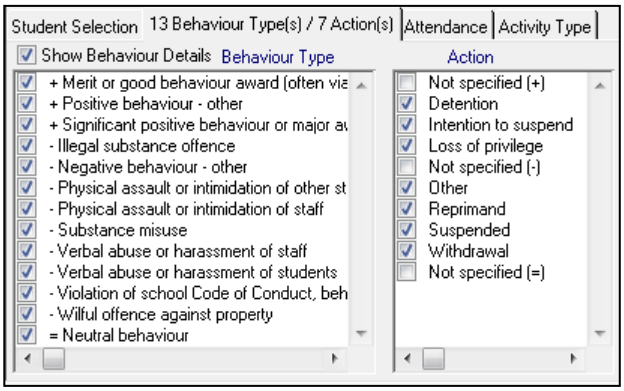
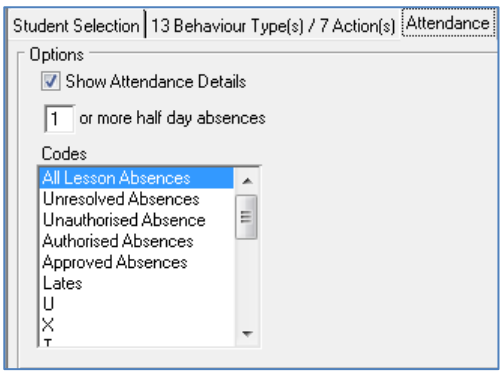
- Click on the ***Behaviour Types/Actions*** tab
- All ***Behaviours*** are checked by default



- 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

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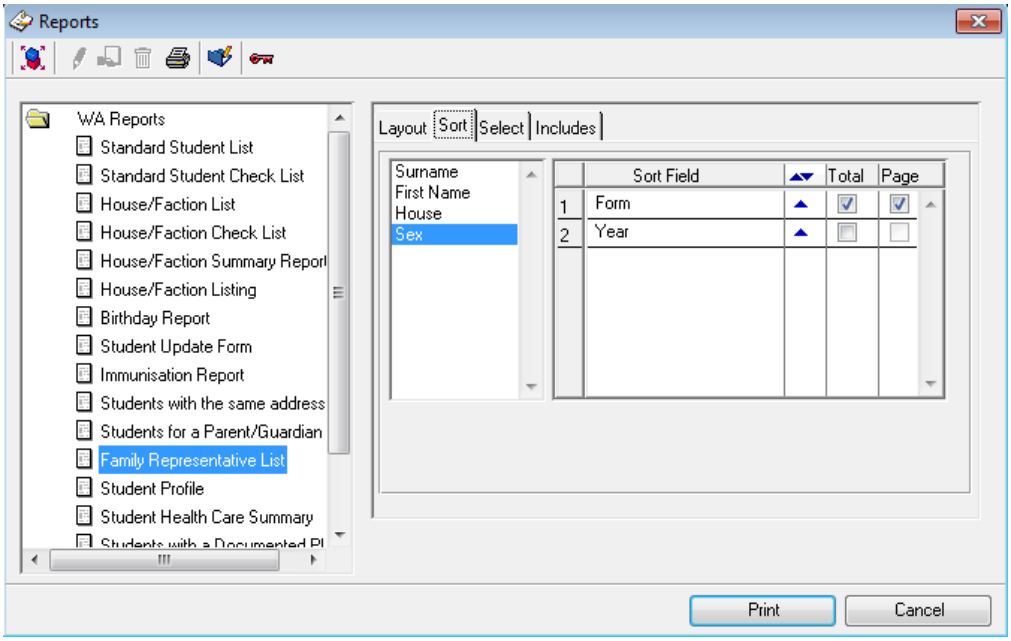
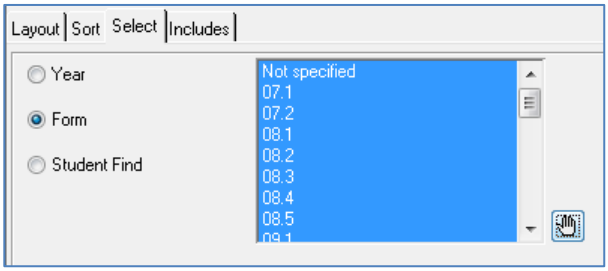
WA Reports > Reports > WA Reports > Family Representative List

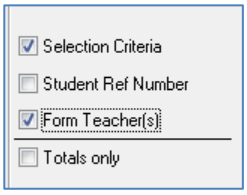
- *Click the **Sort** tab*
- *Sort by **Form** then **Year***
- *Check **Total** for **Form** and **Page***



- *Click the **Select** tab*
- *Click the radio button for **Form***
- *Click Select All*



- *Click the **Includes** tab*
- *Check **Selection Criteria***



- ***Print** to screen*

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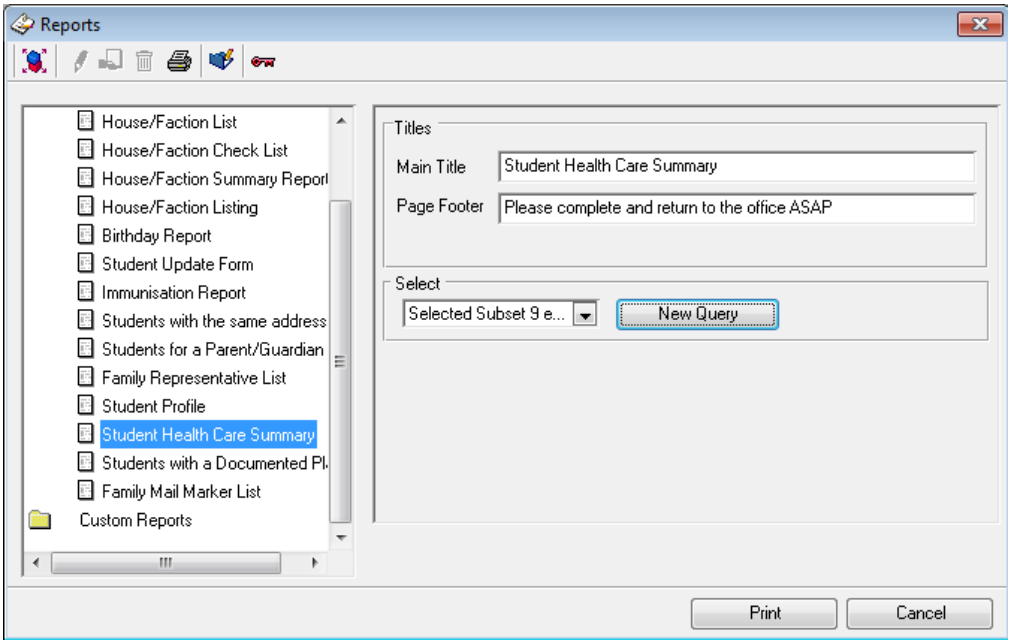
WA Reports > Reports > WA Reports >Student Health Care Summary

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



Note: As this form is being run as a report, it does not create a Student Activity log against the student's record.

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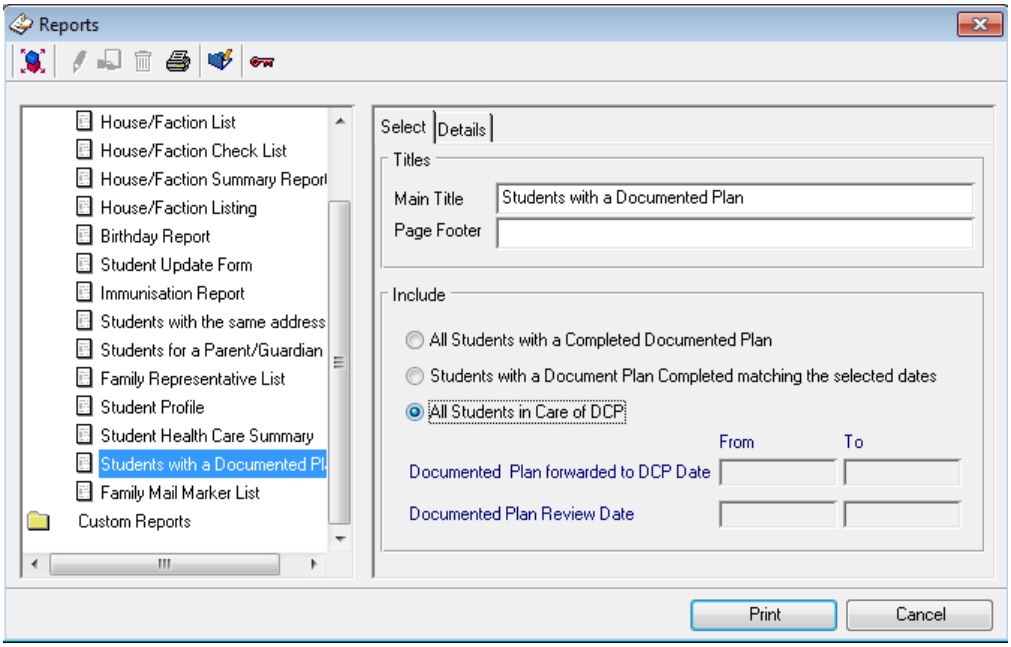
WA Reports > Reports > WA Reports > Students with a Documented Plan

- Select ***All Students in Care of DCP***
- Click ***Print***



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.

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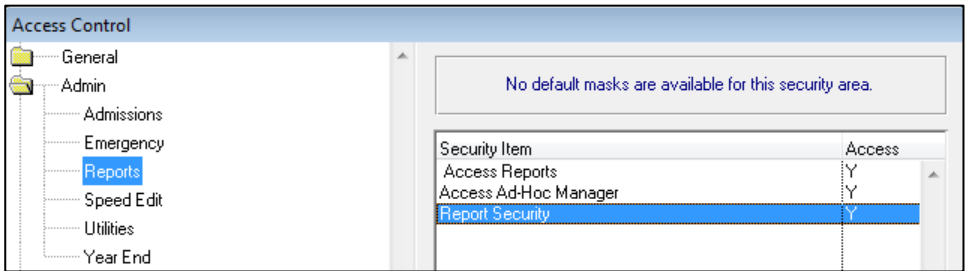
18.3 Report Security

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 Integris 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.

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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

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

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.

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