

# CIVICA

## Integris Advanced Admin Manager Training Notes



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# Contents

1	Introduction .....	7
1.1	What is Administration Manager? .....	7
1.2	Training Program.....	8
1.3	Training Outcomes .....	9
1.4	Logging On to the System .....	10
1.5	The File Menu .....	11
1.6	Accessing Help .....	12
1.7	System Preferences .....	13
2	Parameters.....	14
2.1	Managing Parameters .....	14
2.2	Activity Parameters .....	14
2.2.1	Student Activity Types .....	15
2.2.2	School Activity Types.....	16
2.2.3	Adding Student Activity.....	17
2.2.4	Student Activities Report .....	19
2.2.5	Adding School Activity .....	20
2.2.6	Editing School Activities.....	22
3	Maintaining Student Details .....	23
3.1	Revising Student Find .....	23
3.1.1	Using the Previous Student/Next Student Arrows .....	23
3.1.2	Quick Search .....	23
3.1.3	Make Siblings the Browse Set.....	24
3.1.4	Find Student .....	24
3.1.5	Advanced Find Student Search.....	28
3.1.6	Saving a Query.....	31
3.2	Editing Student Records.....	32
3.2.1	Family Mail Marker .....	32
3.2.2	Flagging Family Mail Markers.....	33
3.2.3	Print Family Mail Markers .....	34
3.2.4	Editing Parent/Guardian Addresses .....	35
3.3	Family Representatives .....	36
3.3.1	Flagging Family Representatives .....	37
3.3.2	Linking Siblings.....	39
3.3.3	Family Representative List .....	40
3.4	Updating a Medical Record .....	42
3.5	Medical Reports .....	45
3.5.1	Medical Details Report.....	45
3.5.2	Medication Report.....	46
3.5.3	Health Care Conditions Review Date .....	47
4	Managing the Rolls.....	48
4.1	Entering Student Details in the Admissions Roll .....	48
4.2	Transfer Students from Admissions to the Current Roll .....	52
4.3	Moving Students to the Former Roll .....	54
4.3.1	Moving an Individual Student to the Former Roll .....	54
4.3.2	Re-Admissions Form .....	56
4.3.3	Moving Multiple Students to the Former Roll.....	57
4.4	Assigning Schools Curriculum and Standards Authority (SCSA) Student Numbers.....	60
5	Exporting and Importing Student Data .....	63
5.1	Exporting Student Information .....	65
5.1.1	School to School Export .....	65
5.1.2	Students Details XML Export.....	66
5.2	Importing Student Data.....	69
5.2.1	School to School Import to the Admissions Roll.....	69
5.3	Moving Students to the Current Roll .....	71
5.3.1	School to School Import to the Current Roll .....	73

5.4	Advanced Admissions Batch Entry .....	75
5.5	Moving Admissions Batch Students to the Current Roll .....	81
6	The External Roll .....	83
6.1	External Roll Active .....	83
6.2	Adding a Student to the External Roll .....	84
7	Mail Merge .....	86
7.1	Introduction to Mail Merge .....	86
7.2	Mail Merge: kst format .....	88
7.2.1	Creating a kst Template .....	88
7.2.2	Using the kst template to create letters .....	90
7.3	Mail Merge using csv format .....	93
7.3.1	Create an Export (.csv) File .....	93
7.3.2	Creating a Mail Merge Letter in Word .....	96
7.3.3	Using the Mail Merge Wizard .....	99
7.3.4	Create Student Activity Record for Letter Sent .....	104
7.3.5	Create Address Labels .....	106
8	User Defined Information .....	110
8.1	Create a UDI .....	110
8.2	Speed Edit UDI .....	113
8.3	Ad Hoc Reports .....	114
8.3.1	Simple Ad Hoc Reports .....	116
8.3.2	Normal Ad Hoc Reports .....	118
9	Admin Reports .....	121
9.1	General Reports .....	121
9.1.1	Medical Conditions .....	121
9.2	Roll Reports .....	122
9.2.1	Parent/Guardian 1 Phone and Address .....	122
9.3	Form Lists .....	123
9.3.1	Student Information Card .....	123
9.4	Check Lists .....	124
9.4.1	Group Checklist .....	124
9.5	Address Labels .....	125
9.5.1	Family Mail .....	125
9.6	Exports .....	126
10	Timetable Reports .....	127
10.1	O&M Reports-Teaching Sets .....	127
10.1.1	User Defined Teaching Set Lists .....	127
11	WA Reports .....	129
11.1.1	Standard Student Checklist .....	130
11.1.2	Student Profile Report .....	135
11.1.3	Student Health Care Summary (Form 1) .....	137
12	Index .....	138
13	Support .....	140
13.1	Phone (CSC) .....	140
13.2	Fax (CSC) .....	140
13.3	Email (CSC) .....	140
14	Online Manuals and Training Notes .....	140
14.1	Civica .....	140
14.2	STIMS Project .....	140

# 1 Introduction

These Training Notes provide a reference during and following Civica Education's Advanced Administration training.

They cover:

- Maintaining Student Details
- School-to-School exports and imports
- User Defined Information
- Mail Merge
- Checklist and Ad Hoc Reports

The Administration Manager Software 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 refers to that data.

## 1.1 What is Administration Manager?

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, the Year End function, Admissions, and Standard and Ad Hoc Reports.

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



## 1.2 Training Program

Time	Content
9.00 am	Help Parameters (Student and School Activity) Adding Student Activity Adding School Activity Viewing the School Diary Locating Students Maintaining Student Details Printing Family Representatives
10.30 am	Morning Tea
10.50 am	Entering Student Details in the Admissions Roll Moving Students to the Former Roll Exporting Student Details Importing Student Details Transfer students to the Current Roll
12.30 pm	Lunch
1.00 pm	Mail Merge 1 (Using .kst templates) Mail Merge 2 (Using MS Word and csv data) Mail Merge Labels Speed Edit User Defined Information Ad Hoc Reports
2.50 pm	Admin Reports WA Reports



## 1.3 Training Outcomes

At the end of training participants will be able to:

- Maintain Parameters
- Use Student and School Activity
- Use Simple Student Search and Student Find
- Maintain Student Details
- Maintain and report on Family Representatives details
- Enter Student Details in the Admissions Roll
- Move Students to the Former Roll
- Export Student Details
- Import Student Details to existing students on the Current Roll
- Create Mail Merge letters using a .kst format and a.csv format
- Create Mail Merge letters using MS Word and a csv datafile
- Create Labels
- Create User Defined fields
- Create an Ad Hoc Report
- Create Admin Reports
- Create Checklist Reports
- Create a Student Profile Report

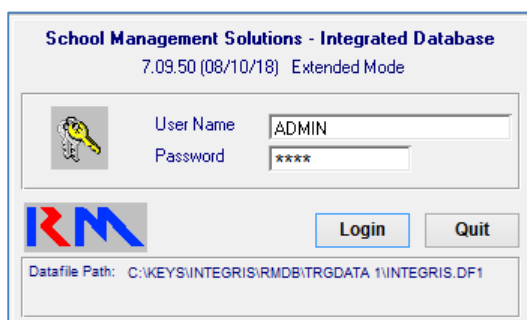
## 1.4 Logging On to the System

### Activity

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



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

A screenshot of the 'School Management Solutions - Integrated Database' login window. The window title is 'School Management Solutions - Integrated Database' and the subtitle is '7.09.50 (08/10/18) Extended Mode'. It contains a login form with a 'User Name' field containing 'ADMIN' and a 'Password' field with four asterisks. To the left of the fields is a small icon of a key. Below the fields is a logo with the letters 'RM' in red and blue. At the bottom are 'Login' and 'Quit' buttons. A status bar at the very bottom shows the 'Datafile Path: C:\KEYS\INTEGRIS\RMDB\TRGDATA 1\INTEGRIS.DF1'.

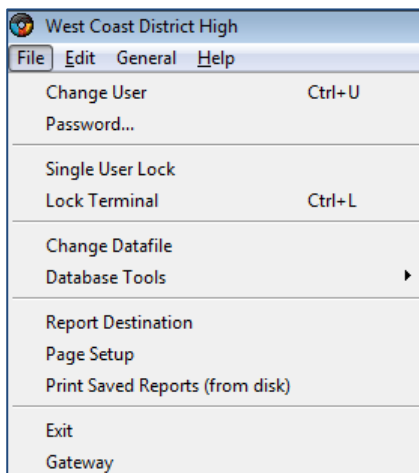
- Click on **Login** or press **<Enter>**

In schools, each user has their own user name and password, which enables access to particular sections of the software as determined by the school administration.

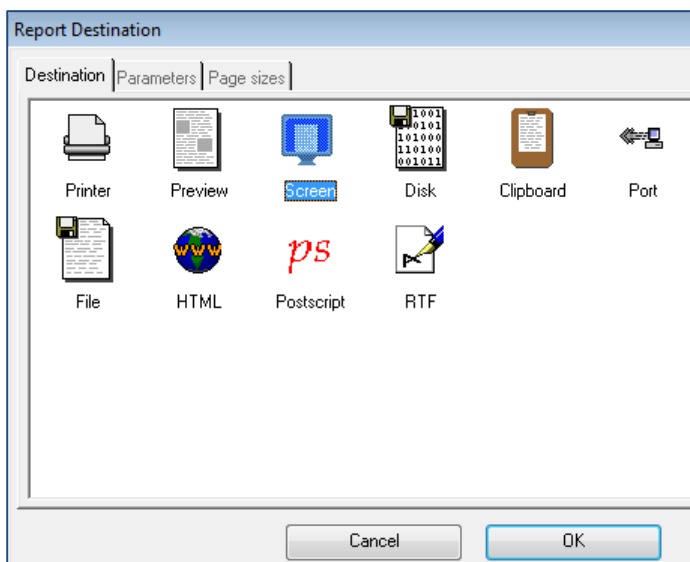
**Note: It is strongly recommended that you change your password once a month.**

## 1.5 The File Menu

The file menu may be accessed by clicking on File in the top left of your screen.



- **Password** enables the user to change his or her password. For security purposes, it is recommended that this is done regularly.
- **Change User** should be used to ensure that each person accessing Integrus does so under their own user name and with their personal levels of access.
- **Lock Terminal** may be used if the user needs to leave his or her computer temporarily, does not want to log off and does not want to allow access to anyone else. Unlocking the terminal requires the user to enter his or her password again.
- **Report Destination** allows the user to choose where to send any report created in Integrus. The options are displayed below.



## Activity: The File Menu

### Top Toolbar > File

View each of the following items in the File menu

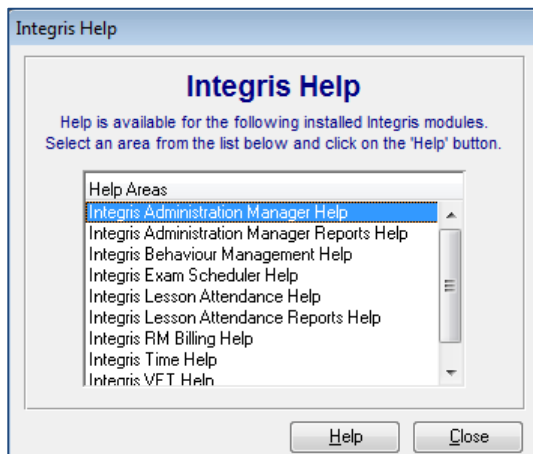
- Password
- Change User
- Lock Terminal
- Report Destination

## 1.6 Accessing Help

## Activity: Accessing Help

### Top Toolbar > Help > Help Contents and Index

- Click **Help** in the top toolbar
- Select **Help Contents and Index**



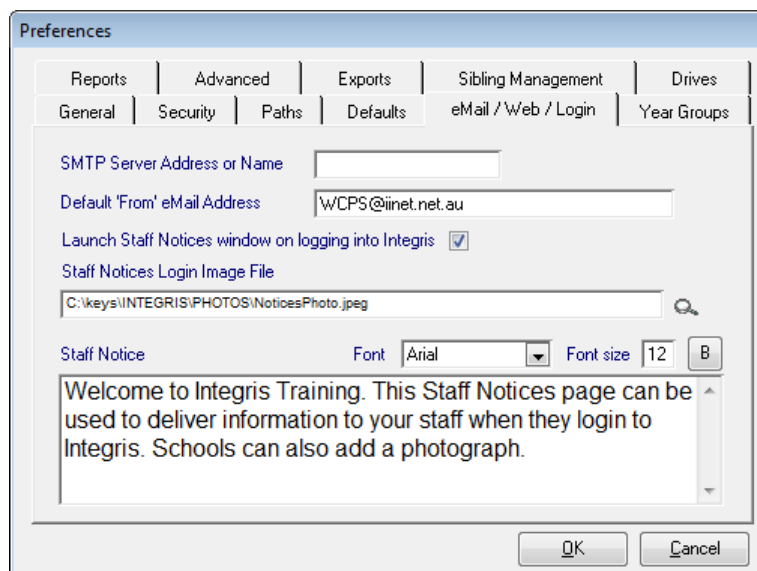
- Highlight **Integris Administration Manager Help**
- Click **Help**
- View the manual
- **Close** the manual and Help


**Note: <Ctrl + F> allows you to search a document for a specific topic or go to Edit and Search to open a search window**

## 1.7 System Preferences

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

Schools can now add a Staff Notice for staff when they first login to Integris each day. A photo from your school can also be added.

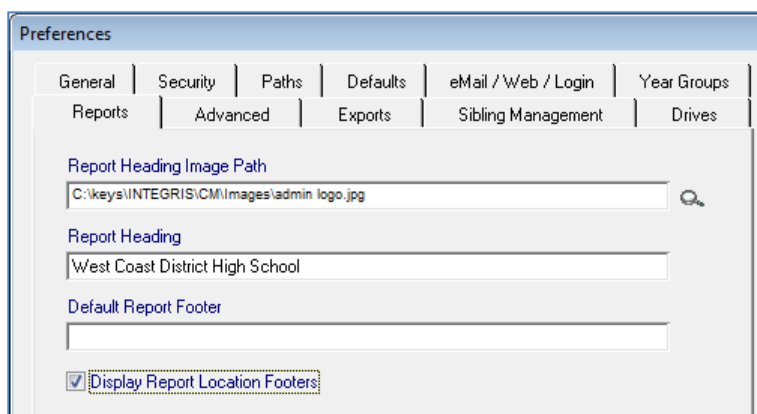


- Click on the magnifying glass 
- Navigate to **C:\keys\Integris\Photos\noticesPhoto2.jpg** to select a new photo
- Click **OK**
- Click on **File > Change User** and log back in as ADMIN and keys to see the change

**Note: The Recommended size for jpeg files is 600x350 pixels**

### General > Control > Preferences > Reports

- Tick the box to **Display Report Location Footers**



- Click **OK**

## 2 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

### 2.1 Managing Parameters

Some Parameters assist in adding and maintaining meaningful information about students and also the school.

### 2.2 Activity Parameters

The Student Activity screen in **General>Student Details** can be used to add further information about students and activities relating to them.

The School Activity screens in **General>School Details>School Diary** can be used by schools to manage their activities and events within a calendar.

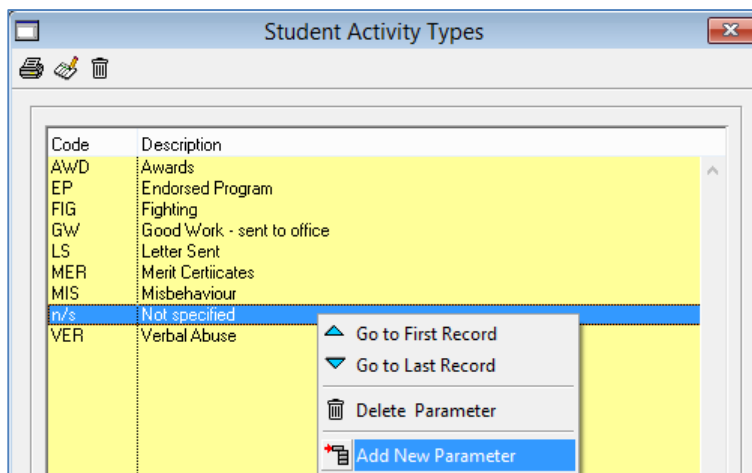
**Parameters** can be added to categorise the Student and School Activity information

## 2.2.1 Student Activity Types

### Activity

#### General > Parameters > Student Activity Types

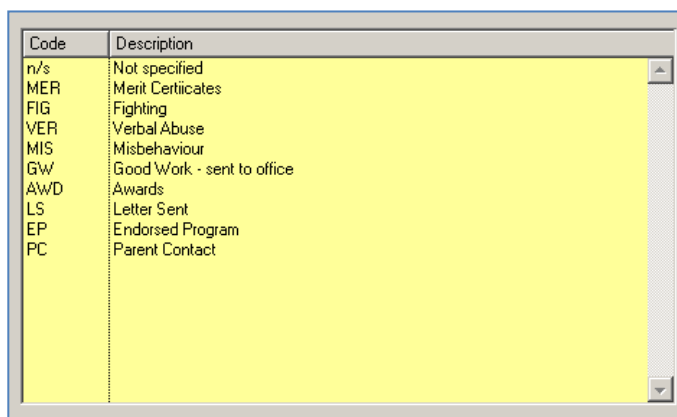
- Add the activity type **Parent Contact**
- Right click in the list of **Student Activity Types**
- Select **Add New Parameter**



- Enter **PC** as the Code
- Enter **Parent Contact** as the Description

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

- Click **OK**



- Close the **Student Activity Types** window

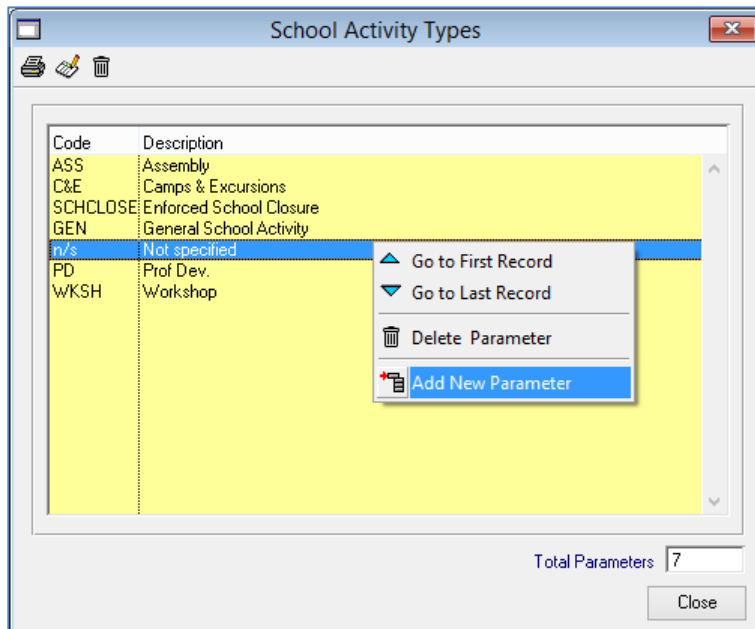


## 2.2.2 School Activity Types

### Activity

#### General > Parameters > School Activity Types

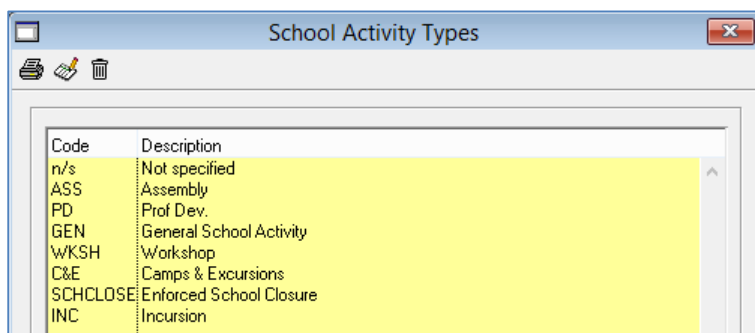
- Open **School Activity Types**
- Right click in the list of **School Activity Types**



- Select **Add New Parameter**
- Enter **INC** as the Code
- Enter **Incursion** as the Description

INC	Incursion
-----	-----------

- Click **OK**



- Close the **School Activity Types** window

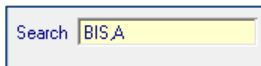
### 2.2.3 Adding Student Activity




#### Activity:

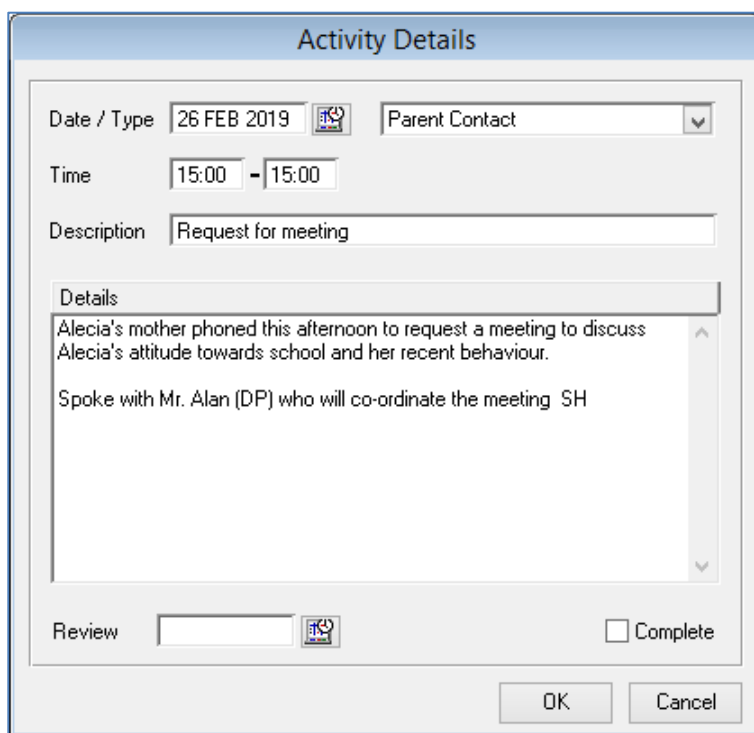
Alecia Bishop's mother has contacted the school to request a meeting to discuss Alecia's attitude to school. Record this in the Student Activity screen.

#### General > Student Details



- Find **Alecia Bishop**

A search bar with the text 'BISA' entered. The search bar has a blue border and a yellow highlight on the text.

- Click on the **Student Activity Icon** 
- Click on the **Edit pencil** 
- Click on **Add New Record** 
- Use today's date
- Add details of the contact as shown below

A screenshot of the 'Activity Details' dialog box. It contains the following fields: 'Date / Type' with '26 FEB 2019' and a calendar icon; 'Parent Contact' with a dropdown menu; 'Time' with '15:00 - 15:00'; 'Description' with 'Request for meeting'; and a 'Details' text area containing the text: 'Alecia's mother phoned this afternoon to request a meeting to discuss Alecia's attitude towards school and her recent behaviour. Spoke with Mr. Alan (DP) who will co-ordinate the meeting SH'. At the bottom, there is a 'Review' field, a 'Complete' checkbox, and 'OK' and 'Cancel' buttons.

Activity Details

Date / Type 26 FEB 2019  Parent Contact 


Time 15:00 - 15:00

Description Request for meeting

Details

Alecia's mother phoned this afternoon to request a meeting to discuss Alecia's attitude towards school and her recent behaviour.

Spoke with Mr. Alan (DP) who will co-ordinate the meeting SH

Review  ☐ Complete

OK Cancel

- Click **OK**
- Highlight the Activity to view the details

Student Alecia Bishop

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

Activities

Date	Type	Description	Review	Complete
28 NOV 2018	Letter Sent	c:\KEYS\INTEGRIS\MMTPL\LETTERS\Head Lice03		
26 FEB 2019	Parent Contact	Request for meeting		

Activity Detail

Alecia's mother phoned this afternoon to request a meeting to discuss Alecia's attitude towards school and her recent behaviour.

Spoke with Mr. Alan (DP) who will co-ordinate the meeting SH

Print

OK Cancel

- Add a further record as shown below

Activity Details

Date / Type: Today's Date Parent Contact

Time: 10:00 - 10:00

Description: Meeting scheduled

Details

Mr. Alan has scheduled a meeting with Alecia's mother for Tuesday dd/mm/yy. School Psych and Year Co-ordinator to attend. SH

Review: ☐ Complete

OK Cancel

- Click **OK** and **Print** to view details in a report
- Click **OK** to save and finish

**Note: Student Activity Records can be printed from the main Student Activity display screen for individual students and can also be printed while in Edit Mode. To report on multiple student's activity use the Report in Admin > Reports > General Reports.**

## 2.2.4 Student Activities Report

### Activity

#### Admin > Reports > General Reports > Student Activities Report

- Check the box **Sort by Student**
- Check the box **Show Activity Details**
- Enter **Both** in the **Completion Status**
- Click the **New Query** tab
- Find the **Year 8** students

The screenshot shows a software window titled 'Reports'. On the left is a tree view under 'General Reports' with 'Student Activities Report' selected. The main area contains several sections: 'Titles' with 'Main Title' set to 'Student Activities Report' and an empty 'Page Footer' field; 'Students (optional)' with a dropdown set to 'Selected Subset 108 ...' and a 'New Query' button; 'Activity' with 'Activity Type' set to 'All'; 'Dates' with 'Activity Date' and 'Review Date' each having 'From' and 'To' date pickers; and 'Options' with checkboxes for 'Sort by Student' (checked), 'Show Activity Details' (checked), and 'Show Reference No.' (checked), plus a 'Completion Status' dropdown set to 'Both'. 'Print' and 'Cancel' buttons are at the bottom right.




- Click **Print** and **OK** to print to the screen

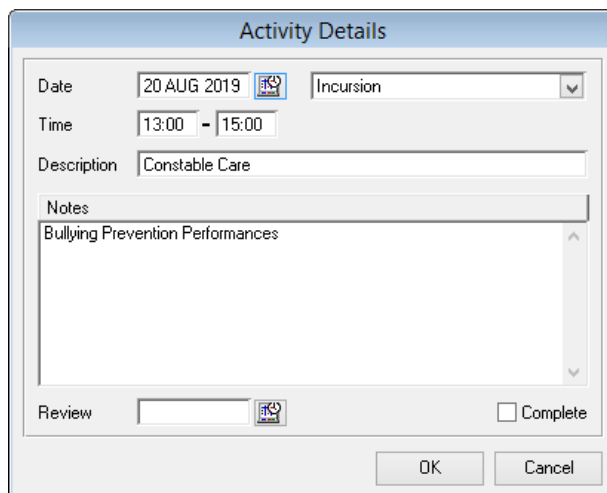
## 2.2.5 Adding School Activity

### Activity

#### General > School Details > School Diary


Constable Care will be attending the School for 3 afternoons for performances regarding Bullying.

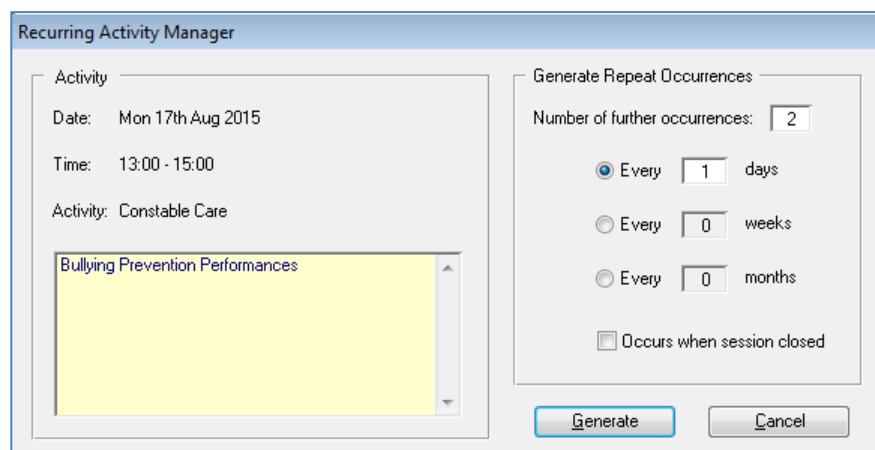
- Click on **Display School Diary** 
- Click on **Year View** 
- Select **August 20th**
- Click on  to add an activity
- Select **Incursion** from the School Activity Type drop down menu
- Enter **13:00 to 15:00** as the times
- Enter the other details as shown below



The 'Activity Details' dialog box shows the following information:

- Date: 20 AUG 2019
- Time: 13:00 - 15:00
- Description: Constable Care
- Notes: Bullying Prevention Performances
- Buttons: Review, Complete, OK, Cancel

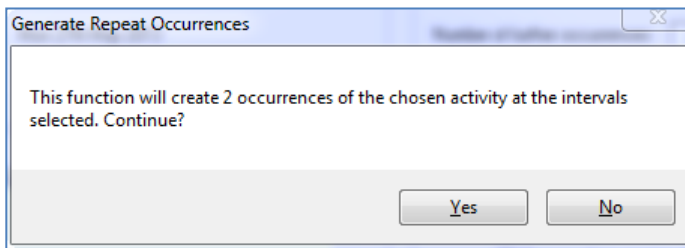
- Click **OK**
- View the Activity
- Click on **Recurring Events** 
- Add 2 further occurrences




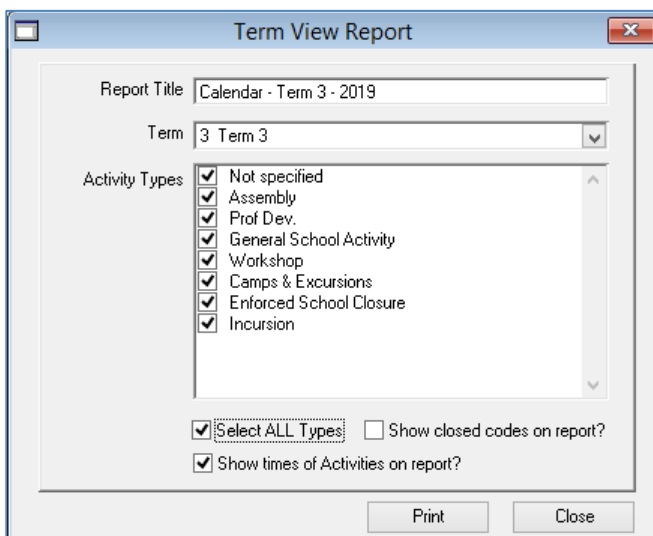
The 'Recurring Activity Manager' dialog box shows the following information:

- Activity: Bullying Prevention Performances
- Date: Mon 17th Aug 2015
- Time: 13:00 - 15:00
- Activity: Constable Care
- Generate Repeat Occurrences: Number of further occurrences: 2
- Frequency: Every 1 days (selected)
- Buttons: Generate, Cancel

- Click on **Generate** and view the message



- Click **Yes**
- Click on  to view a Term Calendar
- Select **Term 3** and **Select All Types**




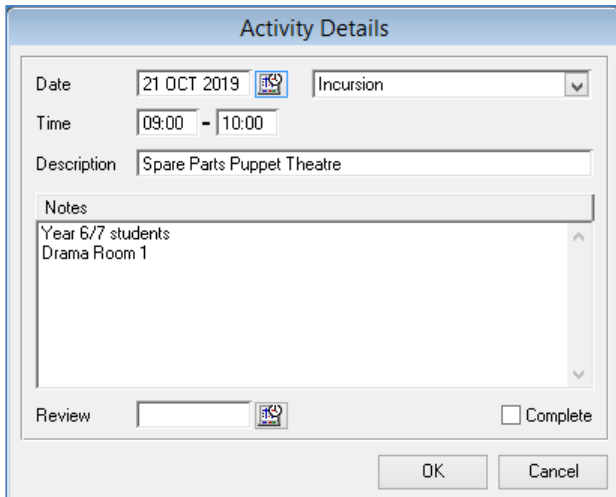
- Click on **Print**
- View, then close the Calendar and Close the **Term View Report** window

## 2.2.6 Editing School Activities


### Activity

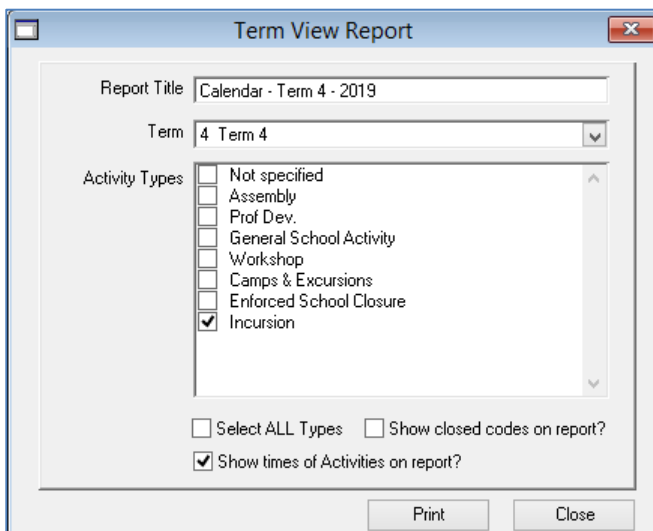
#### General > School Details > School Diary > Year View

- Select Monday 21st October
- Highlight the Spare Parts Puppet Theatre Incursion
- Click Edit 
- Change the Activity Type to Incursions
- Add the required Notes



The 'Activity Details' dialog box is shown. It has a title bar 'Activity Details'. Inside, there are fields for 'Date' (21 OCT 2019), 'Time' (09:00 - 10:00), and 'Description' (Spare Parts Puppet Theatre). There is a 'Notes' text area containing 'Year 6/7 students' and 'Drama Room 1'. At the bottom, there is a 'Review' field, a 'Complete' checkbox, and 'OK' and 'Cancel' buttons.

- Click OK
- Click on  to view a Term Calendar
- Select Term 4 and Incursions



The 'Term View Report' dialog box is shown. It has a title bar 'Term View Report'. Inside, there is a 'Report Title' field (Calendar - Term 4 - 2019) and a 'Term' dropdown (4 Term 4). Below is a list of 'Activity Types' with checkboxes: Not specified, Assembly, Prof Dev., General School Activity, Workshop, Camps & Excursions, Enforced School Closure, and Incursion (checked). At the bottom, there are checkboxes for 'Select ALL Types', 'Show closed codes on report?', and 'Show times of Activities on report?' (checked). 'Print' and 'Close' buttons are at the bottom right.

- Click Print
- View and close the calendar
- Close the Diary and School Details





## 3 Maintaining Student Details

### 3.1 Revising Student Find

#### 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 standard Integris **Find Student** function 
- Using the Advanced Find Student Search 

#### 3.1.1 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.

#### 3.1.2 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.

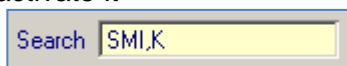


The search operates on the currently defined browse set in the Student Details window. If no browse set is defined, the currently selected roll will be searched.

### 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 <Tab>



The Student Details screen for Kane Smith is displayed.

- Use the Simple Student Search to locate William Green's record
- Repeat to locate Jackie Albert's records

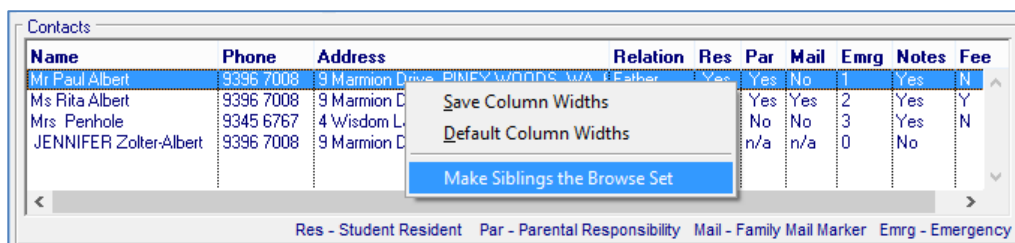
### 3.1.3 Make Siblings the Browse Set

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 siblings' 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

### 3.1.4 Find Student

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 students' ages), addresses and user-defined information (UDI).

## Activity

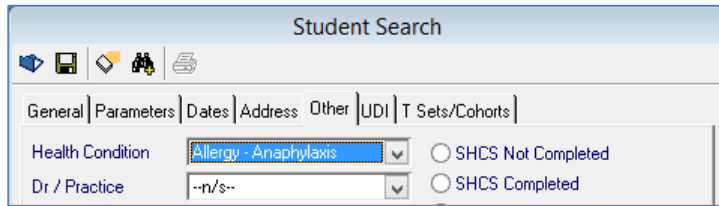
### Search for students 15 years and older

- Select the **Dates** tab
- From the drop down list select **Student Age criteria**
- Click the button to change it to the
- Enter the age **15**
- Enter TODAY'S date


- Click **Find** or <Enter>
- Sort by Date of Birth column
- Click to view a report

## Find students with a Health Condition

- Find the students who have an **Allergy - Anaphylaxis**

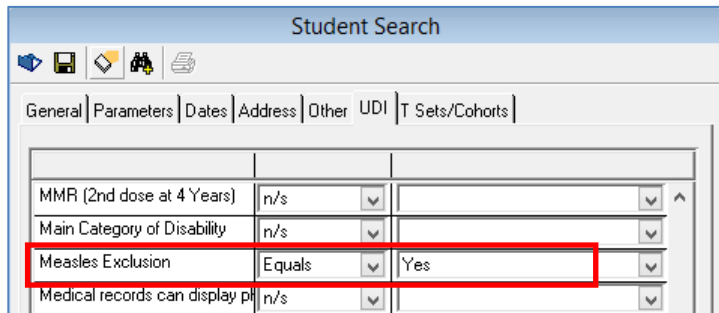


The screenshot shows the 'Student Search' window. The 'General' tab is selected. In the 'Health Condition' dropdown, 'Allergy - Anaphylaxis' is chosen. The 'SHCS Not Completed' radio button is selected. The 'Dr / Practice' dropdown shows '--n/s--'.

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


## Search for Students with a Measles Exclusion

- Select the **UDI** tab
- Choose the option **Equals** from the dropdown list and type **Yes** in the third column



The screenshot shows the 'Student Search' window with the 'UDI' tab selected. The 'Measles Exclusion' row is highlighted with a red box. The 'Main Category of Disability' dropdown is set to 'Equals' and the value 'Yes' is entered in the third column.

Field	Value	Operator	Value
MMR (2nd dose at 4 Years)	n/s		
Main Category of Disability	n/s		
Measles Exclusion	Equals		Yes
Medical records can display pl	n/s		

- Click **Find** or **<Enter>**
- Sort by **Year Level** then Print 

## Find students In Care of DCP

- Select the **Dates** tab

The screenshot shows the 'Student Search' dialog box with the 'Dates' tab selected. The 'General' tab is also visible. The 'Dates' tab contains the following fields and options:

- Date of birth range:** A dropdown menu set to 'Date of birth range' with input fields for 'to'.
- Birthday (Day, Month, Year):** A dropdown menu set to '--n/s--' with 'From' and 'To' input fields.
- Entry Date:** Input field.
- Leaving Date:** Input field.
- Date Checked:** Input field.
- Documented Plan forwarded to DCP Date:** Input field.
- Documented Plan Review Date:** Input field.
- Radio buttons:**
  - ☐ Not In Care of DCP
  - ☒ In Care of DCP
  - ☐ Either
  - ☐ Not Documented Plan Completed
  - ☐ Documented Plan Completed
  - ☒ Either

At the bottom, there is a checkbox for 'Show Inactive Parameters in Dropdown Lists' and 'Find' and 'Close' buttons.

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

- Click **Back** and clear your settings



## Find the Students with an Access Restriction

- Click on the **Parameters** Tab

The screenshot shows the 'Student Search' dialog box with the 'Parameters' tab selected. The 'General' tab is also visible. The 'Parameters' tab contains the following fields and options:


- Indigenous Status:** Dropdown menu set to '--n/s--'.
- First Language:** Dropdown menu set to '--n/s--'.
- Nationality:** Dropdown menu set to '--n/s--'.
- Study Type:** Dropdown menu set to '--n/s--'.
- Religion:** Dropdown menu set to '--n/s--'.
- Country of Birth:** Dropdown menu set to '--n/s--'.
- Allowance Type:** Dropdown menu set to '--n/s--'.
- Gender:** Dropdown menu set to '--n/s--'.
- VET Status:** Dropdown menu set to '--n/s--'.
- Visa Sub Class Number:** Input field.
- Radio buttons:**
  - ☐ No Health Card
  - ☐ Health Card
  - ☒ Either
  - ☐ Not Out of Area
  - ☐ Out of Area
  - ☒ Either
  - ☐ Not LBOTE
  - ☐ LBOTE
  - ☒ Either
  - ☐ No Access Restriction
  - ☒ Access Restriction
  - ☐ Either
- Other radio buttons:**
  - ☐ Not an Aus. Citizen/P.R.
  - ☐ Aus. Citizen / Perm. Res.
  - ☒ Either
  - ☐ Birth Cert. Not Seen
  - ☐ Birth Certificate Seen
  - ☒ Either
  - ☐ Part-Time
  - ☐ Full-Time
  - ☒ Either


At the bottom, there is a checkbox for 'Show Inactive Parameters in Dropdown Lists' and 'Find' and 'Close' buttons.

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

- Click **Back** and clear your settings


### 3.1.5 Advanced Find Student Search

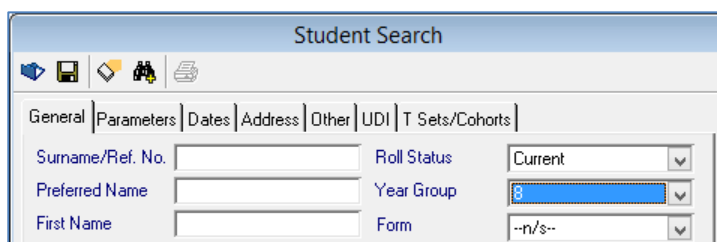
When searching for students the Advanced Find Student Search  tool can be used to add another student or group of students to an existing search results list.

For example, a normal student search could be performed using the  tool. Once the desired list of students is displayed the Advanced Find Student Search tool could be used to add more students to the existing list.

## Activity

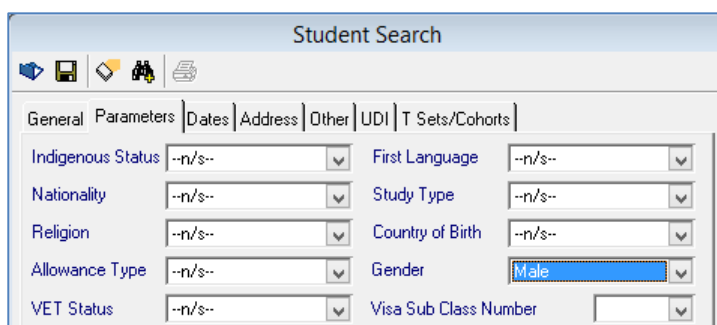
### Find the Year 8 and 9 Boys

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



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

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





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

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

Reference	Surname	Preferred Name	Year	Form	Date of Birth
6	Antonello	Mark	8	08.4	24 JUL 2005
24	Broom	Declan	8	08.2	24 JUL 2005
26	Brown	Oliver	8	08.3	24 JUL 2005
31	Carless	Matthew	8	08.3	13 DEC 2005
33	Cartwright	Matthew	8	08.3	15 AUG 2005
45	Defazio	Matthew	8	08.4	22 NOV 2005
46	Del-Prete	Brayden	8	08.1	13 DEC 2005
51	Donner	Liam	8	08.2	11 OCT 2005
56	Elliott	Bryce	8	08.3	11 OCT 2005
61	Entwistle	Devyn	8	08.4	25 AUG 2005
81	Gray	Nathan	8	08.2	11 OCT 2005
85	Hancock	Kyle	8	08.3	24 JUL 2005
86	Harper	Rhys	8	08.3	11 OCT 2005
94	Ibit	Noah	8	08.4	11 OCT 2005
101	Jury	Brad	8	08.1	11 OCT 2005
106	Keenan	Tom	8	08.2	10 MAY 2006

Total records found 59

Back Select Close

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

Student Search			
<div> </div>			
<div> General   Parameters   Dates   Address   Other   UDI   T Sets/Cohorts </div>			
Surname/Ref. No. <input type="text"/>		Roll Status	Current
Preferred Name <input type="text"/>		Year Group	9

- Select the Parameters tab and Gender – Male

Student Search			
<div> </div>			
<div> General   Parameters   Dates   Address   Other   UDI   T Sets/Cohorts </div>			
Indigenous Status	--n/s--	First Language	--n/s--
Nationality	--n/s--	Study Type	--n/s--
Religion	--n/s--	Country of Birth	--n/s--
Allowance Type	--n/s--	Gender	Male

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



**Student Search Results**

Reference	Surname	Preferred Name	Year	Form	Date of Birth
2	Alkitik	Adam	9	09.1	6 JAN 2005
22	Braddon	Braydie	9	09.2	15 MAR 2005
42	Cunliffe	Aaron	9	09.3	27 OCT 2004
52	Douglas	Mathew	9	09.2	11 MAY 2005
62	Eren	Aidan	9	09.1	11 MAY 2005
67	Fawkes	Ryan	9	09.2	11 MAY 2005
82	Green	William	9	09.2	11 MAY 2005
87	Hiddern	Travis	9	09.3	21 NOV 2004
97	Isacc	Brendan	9	09.2	11 MAY 2005
102	Kalter	Brad	9	09.3	21 NOV 2004
107	Keil	Ethan	9	09.1	5 JUL 2004
117	Kinnane	Brant	9	09.3	21 NOV 2004
142	Le-Ti	Travis	9	09.1	4 AUG 2004
147	Lilt	Callum	9	09.2	4 AUG 2004
152	London	Ronnie	9	09.3	4 AUG 2004
157	Luck	Stevie	9	09.1	15 MAR 2005

Total records found 40

- 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

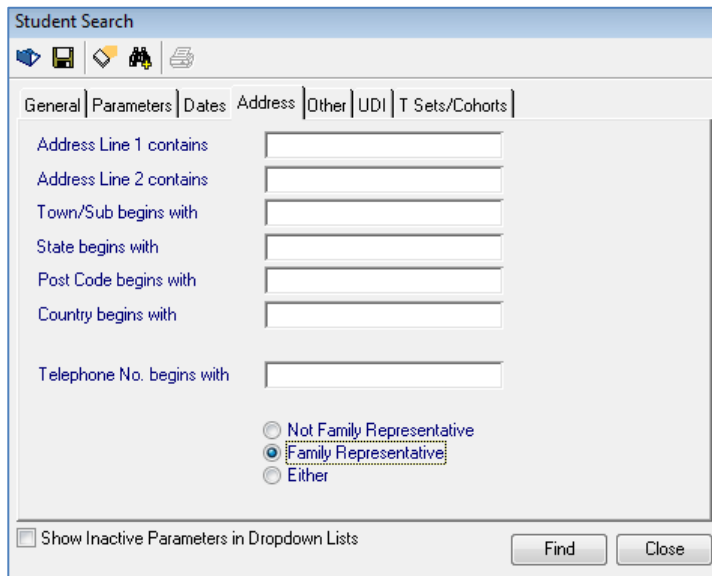
### 3.1.6 Saving a Query

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


## Activity

Find the students who are the **Family Representatives**

- Click on the **Address** tab
- Select the **Family Representative** radio button



The screenshot shows the 'Student Search' window with the 'Address' tab selected. The 'Family Representative' radio button is selected. The 'Find' button is highlighted.



- Save  this query
- Give it an appropriate name and click **OK**



The screenshot shows the 'Save' dialog box with the text 'Please enter a name for this query.' and the input field containing 'Family Reps'. The 'OK' button is highlighted.

- Close the Student Search window

**To use the saved search query.**

- Click Find Student 
- Click View the Query List 
- Highlight **Family Reps**
- Click **Load** and **Find** to locate the students matching the query

**Note: Saving a query saves the question not the answer. Every time the query is loaded, an up-to-date list of the students matching the search criteria is displayed.**

## 3.2 Editing Student Records

### 3.2.1 Family Mail Marker

#### General > Student Details > Family Group

The Family Mail Marker field should be enabled if letters are to be sent to the parent/guardian at this address. If this field is used, ensure 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.

Student Jackie Albert

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

Parent/Guardian 1 | Parent/Guardian2 | Siblings | Other Contacts

Title: Ms, Initials: R, Surname: Albert, First Name: Rita, Middle Name(s): , Relationship: Mother, Gender: Female, Parental Responsibility: ☒, Student Resident: ☒, Fees Billing: ☒, Family Mail Marker: ☒, Mobile: , Emergency: 2

Salutation: Mr and Mrs Albert, Address: 9 Marmion Drive, PINEY WOODS, WA, 6999, Tel: 9396 7008, E-Mail: Albert@ozemail.com.au

Notes: Rita works at Myer City Store can be contacted on 9325 3996, Location: Menswear Dept - Myer, Number: 9325 3996

OK Cancel

In the example above, the student has details of both parents recorded, with only one parent/guardian (the mother) nominated as a family mail marker. The salutation Mr and Mrs Albert will be available as a mail merge field.

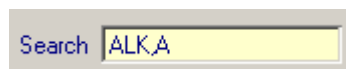
**Note: When entering the Salutation for multiple parents 'and' must be used not '&'. Refer to the Departments Guidelines for Data Entry Procedures document for further information on data entry procedures.**


### 3.2.2 Flagging Family Mail Markers

## Activity

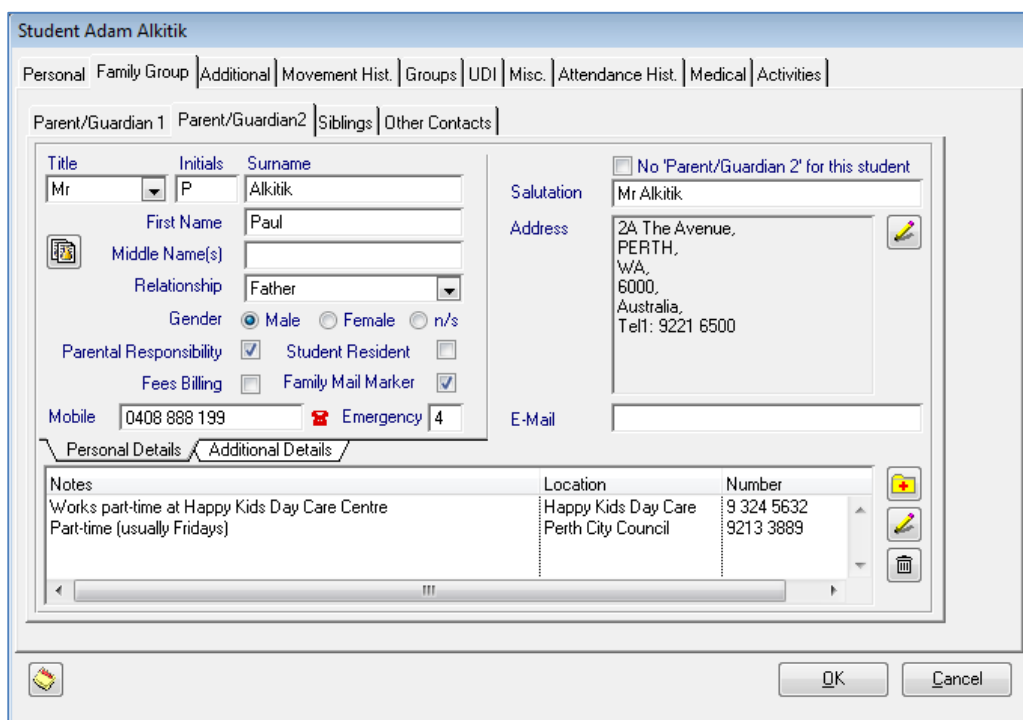
### General > Student Details

- Use the **Search** field to locate **Adam Alkitik's** record



- Click Edit 
- Select the **Family Group** tab
- Select **Parent/Guardian1**
- Edit the Salutation to **read Ms Alkitik**
- Select **Parent/Guardian2**
- Check **Family Mail Marker**
- Edit the Salutation to read **Mr Alkitik**

This will ensure that both Parent/Guardians will receive all correspondence issued, regarding Adam.



- Click **OK** to save

**Both of Jordan Corey's parents wish to receive correspondence regarding his schooling.**

- Flag Jordan's father as a **Family Mail Marker**
- Enter an appropriate **Salutation** for Jordan's father

### 3.2.3 Print Family Mail Markers

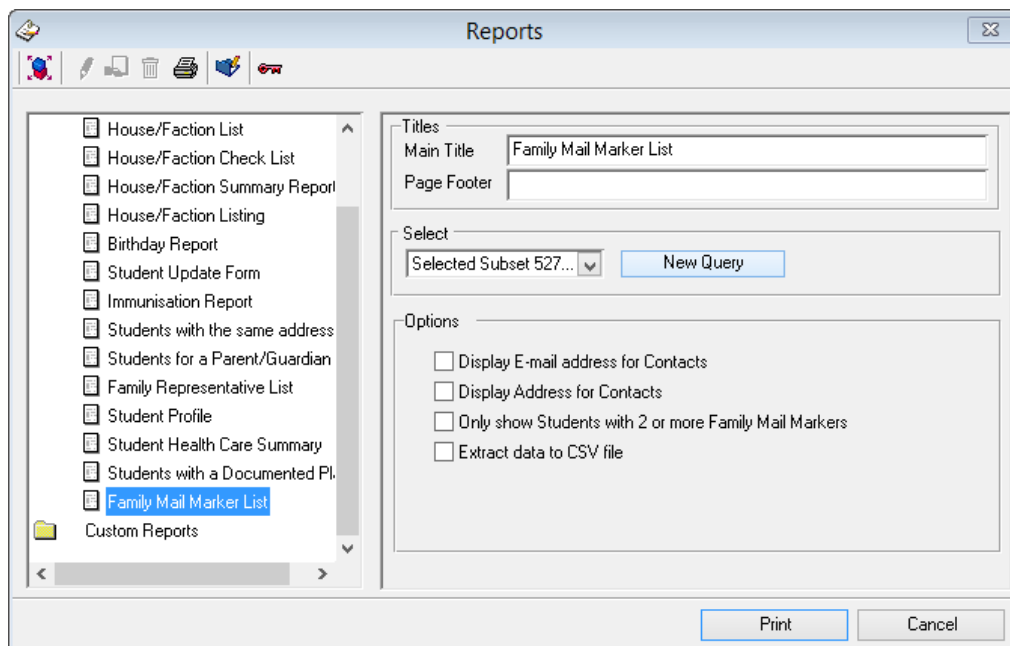
A Report can be printed to display all students and their Family Mail Markers.

## Activity

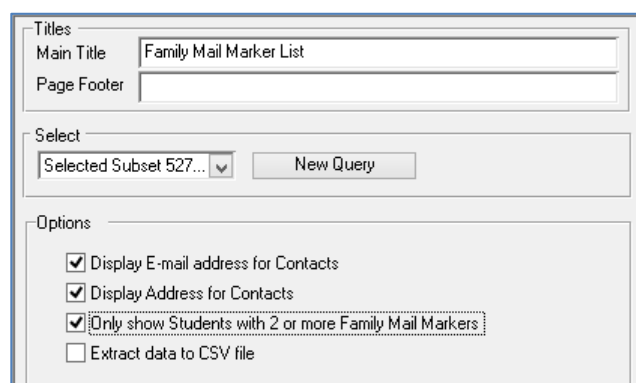
### WA Reports



- Click on the Profile Icon at the top of the screen
- Scroll down and highlight the Family Mail Marker List
- Click on New Query and then Find, Select and Yes to load the Current Roll




- Click Print
- View and close the Report
- Re-Print the Report using some of the additional options

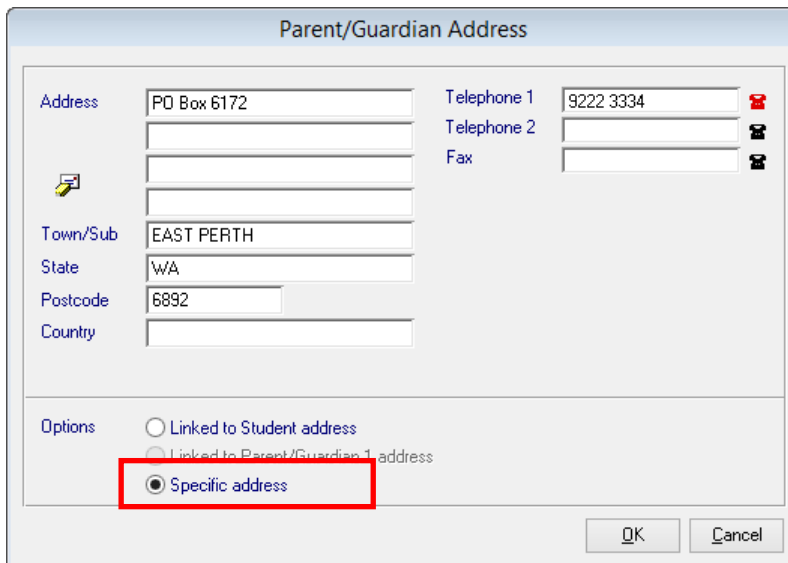


- View and close the Report




### 3.2.4 Editing Parent/Guardian Addresses

## Activity

- Find **Emily Gold**
- Click **Edit**
- Select the **Family Group** tab
- Select **Parent/Guardian1**
- Click Edit 
- Select **Specific address**
- Enter the address information below



Parent/Guardian Address

Address	PO Box 6172	Telephone 1	9222 3334	
		Telephone 2		
		Fax		
Town/Sub	EAST PERTH			
State	WA			
Postcode	6892			
Country				

Options

☐ Linked to Student address

☐ Linked to Parent/Guardian 1 address

☒ Specific address

OK Cancel

- Click **OK**

### 3.3 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.

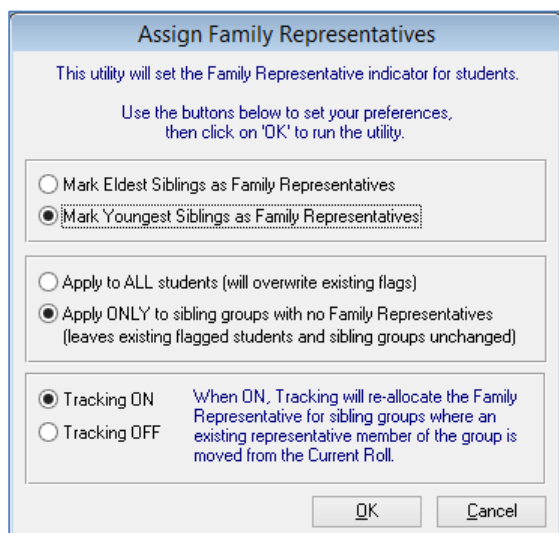
One or more members of a sibling group may be flagged as Family Representatives, although it is anticipated that the marker will usually be attached to the eldest or youngest sibling enrolled at the school.

The Family Representative Field is available in the personal area of the Student window.



If a student is added to the database and they are to be the family representative for a sibling group, mark the Family Representative checkbox. This will not overwrite any sibling already flagged as family representative.

To ensure that all family groups have a family representative, go to **Admin > Utilities > Assign Family Representatives** and choose the options that suit your needs.

A dialog box titled 'Assign Family Representatives'. It contains instructions: 'This utility will set the Family Representative indicator for students. Use the buttons below to set your preferences, then click on 'OK' to run the utility.' There are three sections of radio buttons. The first section has 'Mark Eldest Siblings as Family Representatives' and 'Mark Youngest Siblings as Family Representatives' (selected). The second section has 'Apply to ALL students (will overwrite existing flags)' and 'Apply ONLY to sibling groups with no Family Representatives (leaves existing flagged students and sibling groups unchanged)' (selected). The third section has 'Tracking ON' (selected) and 'Tracking OFF'. A note next to 'Tracking ON' says: 'When ON, Tracking will re-allocate the Family Representative for sibling groups where an existing representative member of the group is moved from the Current Roll.' At the bottom are 'OK' and 'Cancel' buttons.

Press **OK** to run the function.

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



### 3.3.1 Flagging Family Representatives

## Activity

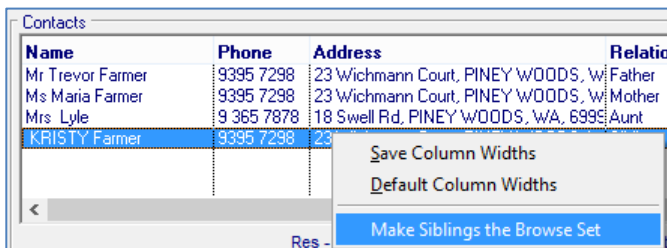
### General > Student Details

- Use Search to locate **Kristof Farmer's** records




Search FAR,K

- Right click in the **Contacts** pane and select **Make Siblings the Browse Set**



Name	Phone	Address	Relatio
Mr Trevor Farmer	9395 7298	23 Wichmann Court, PINEY WOODS, W	Father
Ms Maria Farmer	9395 7298	23 Wichmann Court, PINEY WOODS, W	Mother
Mrs Lyle	9 365 7878	18 Swell Rd, PINEY WOODS, WA, 6995	Aunt
KRISTY Farmer	9395 7298	23	

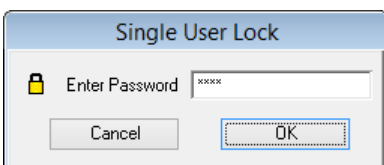
Save Column Widths  
Default Column Widths  
Make Siblings the Browse Set

- Click Next Student  to view Kirsty Farmer's records

Which sibling is the Family Representative? Who is the youngest?

**Note: Assigning Family Representatives in this way requires that only a single user is logged on.**

### File > Single User Lock



Single User Lock

Enter Password:

Cancel OK

- Enter your password **keys** and click **OK**



Locked Message

Enter the message you would like to appear when another user attempts to log on to the system.

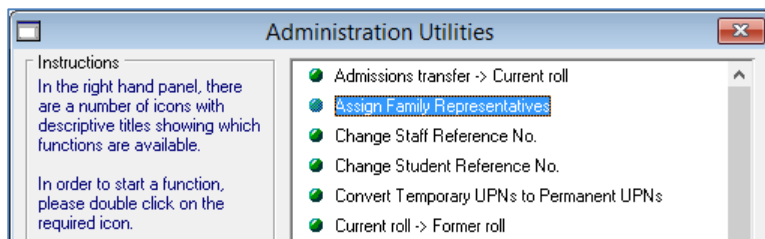
Integrus and remote web services are currently unavailable while maintenance work is carried out.

Enter how long you expect the system to be locked for. 1.00 hrs

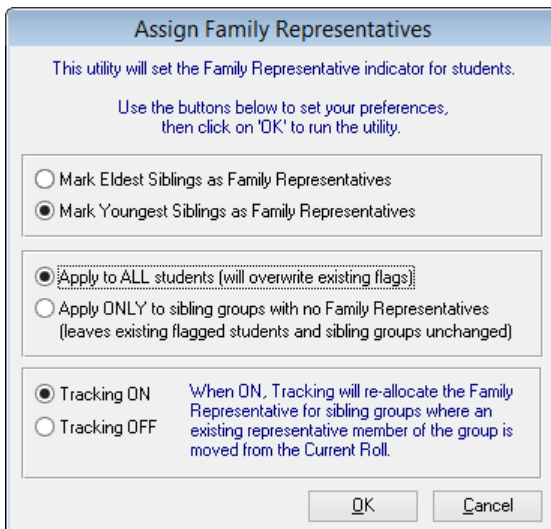
View Users OK

- Click **OK** again

## Admin > Utilities > Assign Family Representative




- Select the options below



- Click **OK** and **Yes**
- Click **OK**
- Close Administration Utilities

## Restore Multi-user

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

## General > Student Details



- Load Kristof and Kirsty Farmer's records
- Check to see who is the Family Rep

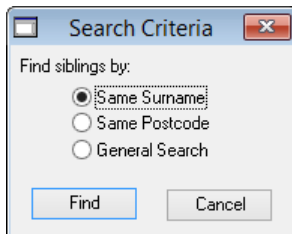
### 3.3.2 Linking Siblings



## Activity

### General > Student Details

Brenton Em and Lance Em are siblings. This needs to be updated in Student Details.

- Find **Brenton Em**
- Click Edit 
- Click the **Family Group** tab
- Click the **Siblings** tab
- Click Add sibling relationship 
- Leave the Search Criteria as **Same Surname**



- Click **Find**
- Highlight **Lance Em**, click **Select**
- Click **OK** to save
- Right click in the **Contacts** pane and select **Make Siblings the Browse Set**
- Click Next Student  to check that Lance has been added as a sibling to Brenton
- Click 
- Uncheck **Family Representative** ☐
- Click **OK**

### 3.3.3 Family Representative List

#### Activity:

#### WA Reports > Reports > WA Reports > Family Representative List

The screenshot shows the 'Reports' window with the 'Family Representative List' report selected. The 'Layout' tab is active, displaying a preview of the report header and footer. The 'Options' section on the right has 'Preferred Name' selected. The 'Title' field is set to 'Family Representative List' and the 'Footer' field is empty.

Layout	Sort	Select	Includes
West Coast District High School Family Representative List			
Title: Family Representative List			
Footer:			

- Click the **Sort** tab
- Sort first by **Form** and then by **Surname**

The screenshot shows the 'Reports' window with the 'Family Representative List' report selected. The 'Sort' tab is active, displaying a table of sorting options. The 'First Name' field is selected. The table shows two sorting criteria: 'Form' and 'Surname'. The 'Total' and 'Page' checkboxes are checked for the 'Form' criterion.

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

- Check **Total** and **Page** for Form

- Click the **Select** tab
- Select **Form**

Layout | Sort | **Select** | Includes

☐ Year  
☒ **Form**  
☐ Student Find

Not specified  
 08.1  
 08.2  
 08.3  
 08.4  
 08.5  
 09.1  
 09.2  
 09.3


- Click Select All 
- Click **Includes**
- Check **Selection Criteria** and **Form Teachers**

Layout | Sort | Select | **Includes**

☐ Selection Criteria  
☐ Student Ref Number  
☒ **Form Teacher(s)**  
☐ Totals only

Order

☐ Student Year Group  
☐ Student Form  
☐ Room  
☒ **Teacher Name(s)**  
☐ Student Sex  
☐ Student House

- **Print** the report to the screen
- Click Save as a Custom Report 

**Report Title**

Please enter a title for the report

Form Family Representative List

Cancel OK

- Close the report and WA Reports

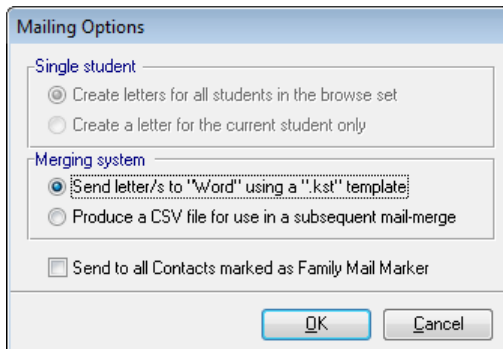
### 3.4 Updating a Medical Record

#### Activity


##### General > Student Details

We have been advised that Aimee Futterby requires an update to her Medical Records. Produce a Form 7 Seizures Form for her parents



- Find the student **Aimee Futterby**
- Click Send Letter 
- Use the **Mailing Options** Shown

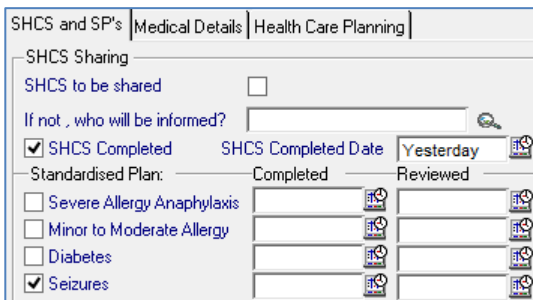


The 'Mailing Options' dialog box is shown. It has two main sections: 'Single student' and 'Merging system'. In the 'Single student' section, the radio button 'Create letters for all students in the browse set' is selected. In the 'Merging system' section, the radio button 'Send letter/s to "Word" using a ".kst" template' is selected. There is also a checkbox 'Send to all Contacts marked as Family Mail Marker' which is unchecked. At the bottom are 'OK' and 'Cancel' buttons.

- Click **OK** and click on up one level 
- Navigate to the **Student Health Care Plan** folder
- Double click on the **Form 7 Seizure** document
- Click **Yes** to send a copy of the letter to the student's activity log


On return of this form we can update Aimee's details

- Click  and Edit Student 
- Select the **SHCS and SP's** tab
- Aimee's **SHCS** has been completed and she has completed a **Seizures Plan** as of YESTERDAY



The 'SHCS and SP's' form is shown with the 'Medical Details' tab selected. It has three main sections: 'SHCS Sharing', 'SHCS Completed', and 'Standardised Plan'. In the 'SHCS Completed' section, the checkbox 'SHCS Completed' is checked, and the 'SHCS Completed Date' is set to 'Yesterday'. In the 'Standardised Plan' section, there are checkboxes for 'Severe Allergy Anaphylaxis', 'Minor to Moderate Allergy', 'Diabetes', and 'Seizures'. The 'Seizures' checkbox is checked. There are also columns for 'Completed' and 'Reviewed' with clock icons.

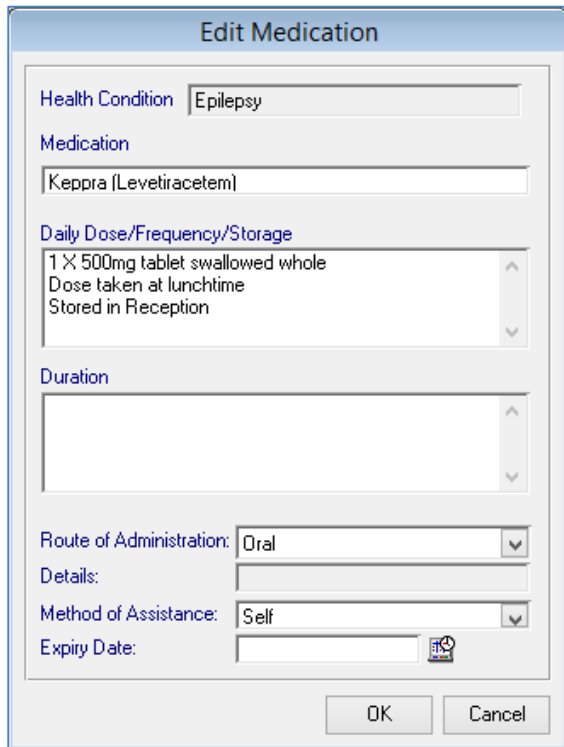
- Mark the Medical Details Tab as shown below

- Select the **Health Care Planning** tab
- Highlight the Health Condition and click Edit  and enter the information displayed below
- Enter the Emergency Response Plan information under the existing note

**Note: The Emergency Response Plan can be copied and pasted from Form 7 Seizure.kst which can be found in the following location C:\keys\Integris\MMTPL\Student Health Care Plan.**

- 
- Health Care Plan - Edit
- Health Condition: Epilepsy
- Plans
- Daily Management Plan
- Emergency Response Plan
- Severe attacks - contact mother or Dr Ryan.  
 Step 1. Remain calm and remain with student  
 Step 2. Remove furniture or objects that could cause harm. Do not restrain  
 Step 3. Record the length of the seizure and what happens during it
- Requirements
- ☒ Medication required ☐ Staff Training required  
☐ Daily Management Plan required ☒ Emergency Response Plan required  
☒ Is the Health Care Plan to be shared with all Staff?  
 If not ticked, please refer to Principal
- ☒ Health condition flagged on status bar
- OK Cancel

- Click Open Medication Details  and Add Medication 
- Enter the **Medication** information as displayed below



**Edit Medication**

Health Condition: Epilepsy

Medication: Kepra (Levetiracetem)

Daily Dose/Frequency/Storage: 1 X 500mg tablet swallowed whole  
Dose taken at lunchtime  
Stored in Reception

Duration:

Route of Administration: Oral

Details:

Method of Assistance: Self

Expiry Date:

OK Cancel

- Add an Expiry Date
- Check the information entered, then click **OK** twice



## 3.5 Medical Reports

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

### 3.5.1 Medical Details Report

#### Activity

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

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

The screenshot shows the 'Reports' window with the 'Medical Details' report selected in the left-hand tree. The right-hand pane shows the configuration for this report. The 'Titles' section has 'Main Title' set to 'Medical Details' and 'Page Footer' is empty. The 'Sort' section shows a table with columns 'Form', 'Sort Field', 'Total', and 'Page'. The first row is '1 Year' with 'Year' in the 'Sort Field' column. The 'Select' section has several checkboxes: 'One page per student' (checked), 'Include Student Photograph' (checked), 'Only include students with 'flagged' health conditions' (checked), 'Include Daily Management Plan' (checked), and 'Include Parent/Guardian 1 Details' (checked). A 'Selected Subset 527 ...' dropdown and a 'New Query' button are also present. At the bottom are 'Print' and 'Cancel' buttons.

Form	Sort Field	Total	Page
1	Year		

- 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.**

### 3.5.2 Medication Report

## Activity

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

- Sort by **Form** then **Year**
- Click **New Query**
- Find **All Current** students
- **Print** to the screen

Reports

General Reports

- Student Activities Report
- Activities Report
- Medication Report
- Medical Conditions
- Medical Conditions Trained Staf
- Medical Details
- Doctor/Practice List
- Dental Practice List
- Birthday Report
- Students with no Address
- Students and their Teaching Se
- List of UDIs
- Health Care Conditions Review

Titles

Main Title: Medication Report

Page Footer:

Sort

DOB  
Gender

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

Select

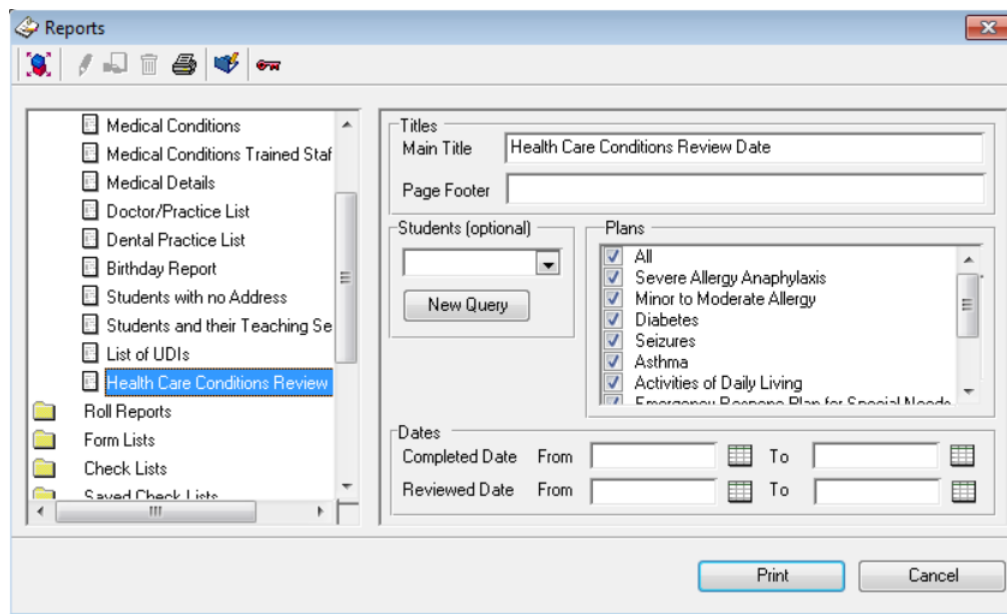
Selected Subset 511 ...

### 3.5.3 Health Care Conditions Review Date

## Activity

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

- Select *Plans ALL*.
- **Print** to the screen  
[All students with a Health Care Condition Plan will be selected for the Report]



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

## 4 Managing the Rolls


### 4.1 Entering Student Details in the Admissions Roll

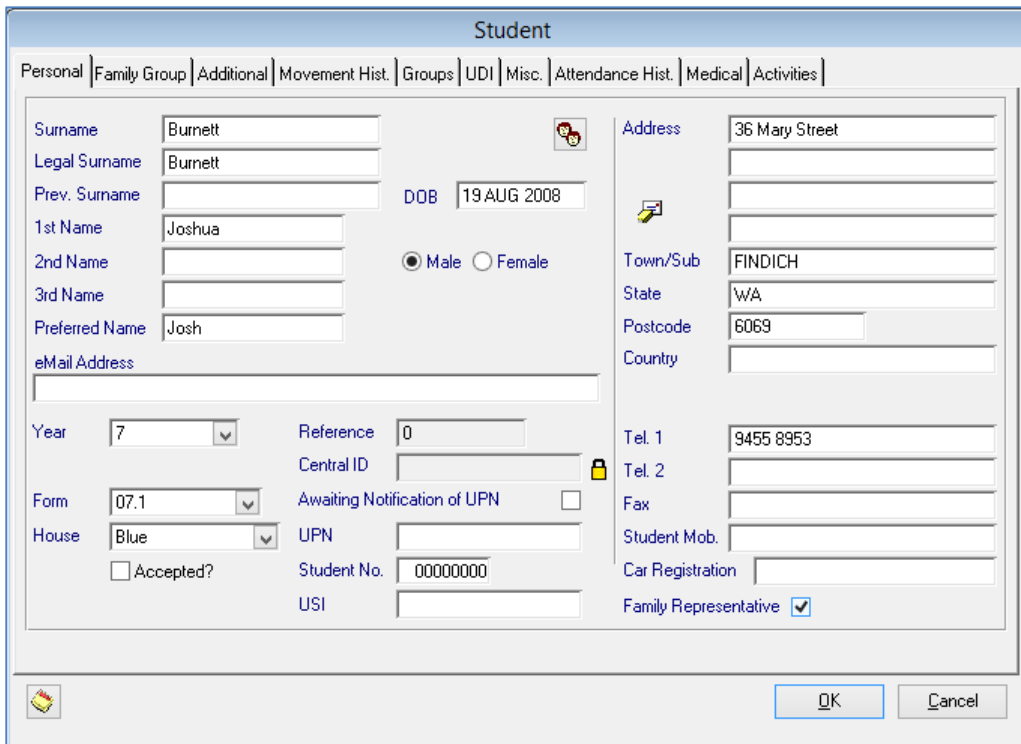
While it is recommended that schools use the school to school export and import processes to enrol new students, for any number of reasons this is not always possible. In these instances, students' details will need to be entered manually.

#### Activity

Joshua Burnett will be starting at the school next week. His mother has completed his enrolment form today. We do not have his details from his previous school.

##### General > Student Details

- Select the **Admissions roll**
- Click Add Student 
- Type **Burnett** in the surname field and **<Tab>**
- Cancel **Choose Siblings**
- Enter Joshua's personal details



- Check **Family Representative**


- Select the **Family Group** tab
- Enter his mother's details in **Parent/Guardian 1**

The screenshot shows the 'Student' form with the 'Family Group' tab selected. The 'Parent/Guardian 1' sub-tab is active. The form includes the following fields and options:

- Title:** Mrs (dropdown)
- Initials:** S
- Surname:** Burnett
- Salutation:** Mrs Burnett
- Address:** 36 Mary Street, FINDICH, WA, 6069, Tel: 94558953
- First Name:** Sabina
- Middle Name(s):** (empty)
- Relationship:** Mother (dropdown)
- Gender:** Male (radio), Female (radio, selected), n/s (radio)
- Parental Responsibility:** (checked)
- Student Resident:** (checked)
- Fees Billing:** (checked)
- Family Mail Marker:** (checked)
- Mobile:** 0407 080 426
- Emergency:** 1
- E-Mail:** (empty)
- Notes:** A large text area with a scroll bar.
- Location:** (empty)
- Number:** (empty)

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

**Note:** Do not use ' & ' in the Salutation field for multiple parents.

- Click Add Notes  on the right
- Enter the mother's work information

The screenshot shows the 'Contact Information' form. It includes the following fields and options:

- Manager at Coles:** A large text area with a scroll bar.
- Location:** Galleria Morley
- Number:** 94719620

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

- Click **OK**

- Select the **Additional** tab

- Check **Australian Citizen / Permanent Resident**
- Check **Birth Certificate Seen** and add Australia as the Country of Birth
- Enter TODAY's date as the date Joshua's Birth Certificate was checked

**Student**

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

Nationality: Not specified  
 Religion: Not specified  
 First Language: Not specified  
 Indigenous Status: Not specified  
 Study Type: Not specified  
 Main Lang OTE SAH: Not specified

Mainly speak English at home? ☐  
 LBOTE ☐  
 Out of State ☐  
 Out of Area ☐  
 Access Restriction ☐  
 Entered in SLP Program ☐  
 Educational Support Program ☐  
 EAL/D Stage ☐  
 Documented Plan Completed ☐  
 In Care of DCP ☐  
 Risk Management Plan ☐

Australian Citizen / Permanent Resident ☒  
 In Receipt of Allowance ☐  
 Allowance Type: Not specified  
 Date Arrival Australia:   
 Visa Grant No.   
 Visa SC No. Expiry Date:   
 Int. Fee Paying:   
 Birth Certificate Seen ☒  
 Country of Birth: Australia  
 Date Checked: Today's Date  
 Passport Sighted ☐  
 Passport Number:   
 Entry Date:   
 Prev. School:   
 Leave Date:   
 Destination:   
 Records Sent:   
 Attendance: Current (Single registr...  
 Terms in this school: 0  
 Boarder ☐  
 Terms in other school(s): 0  
 Excluded ☐  
 FTE: 1.00  
 Part Time Status: ☐ am ☐ pm ☒ n/a ☐ Custom  
 Documented Plan Review Date:   
 Documented Plan forwarded to DCP:   
 OK Cancel

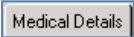
- Select the **Movement History** tab and click Add
- Enter the **To** date as YESTERDAY (or last Friday)
- Enter the previous **School** and **Reason**

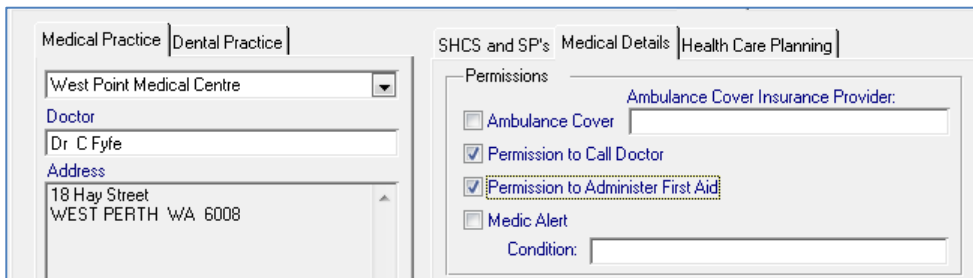
**Movement Details**


Date From:   
 To: Yesterday  
 School: Tapping PS  
 Reason: Moved Address  
 OK Cancel

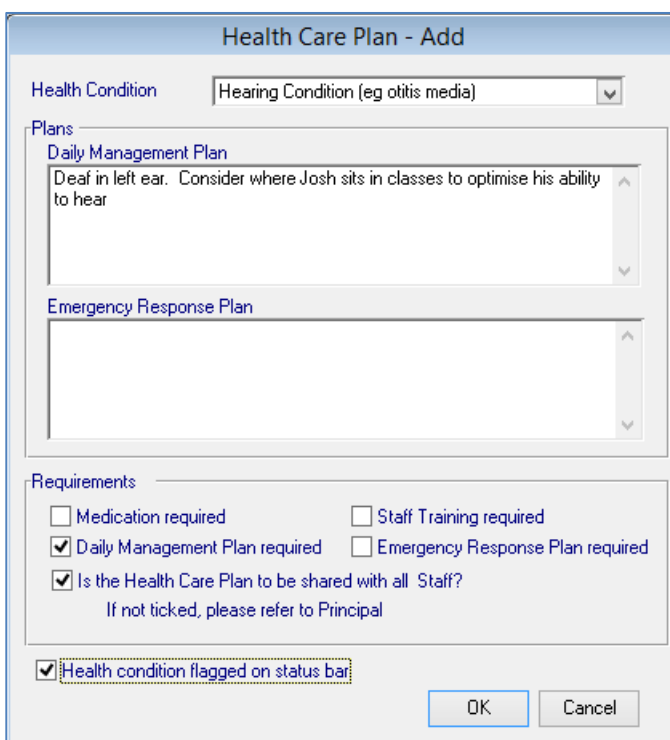
- Click **OK**
- Select the **Medical** tab
- Select a **Medical Practice**
- Enter a **Doctor's** name
- Tick the **SHCS Completed** box (Student Health Care Summary-Form 1) and add today's date


West Point Medical Centre  
 Doctor: Dr C Fyfe  
 Address:   
 SHCS Sharing  
 SHCS to be shared ☐  
 If not, who will be informed?   
☒ SHCS Completed  
 SHCS Completed Date: Today's date

- Click the **Medical Details** tab 
- Check **Permission to Call Doctor** and **Permission to Administer First Aid**




- Select the **Health Care Planning** tab
- Add  and enter Joshua's medical condition as below, then click **OK**



- Click on the **Miscellaneous** tab 
- Under Immunisation Details, check the **Evidence Provided** box





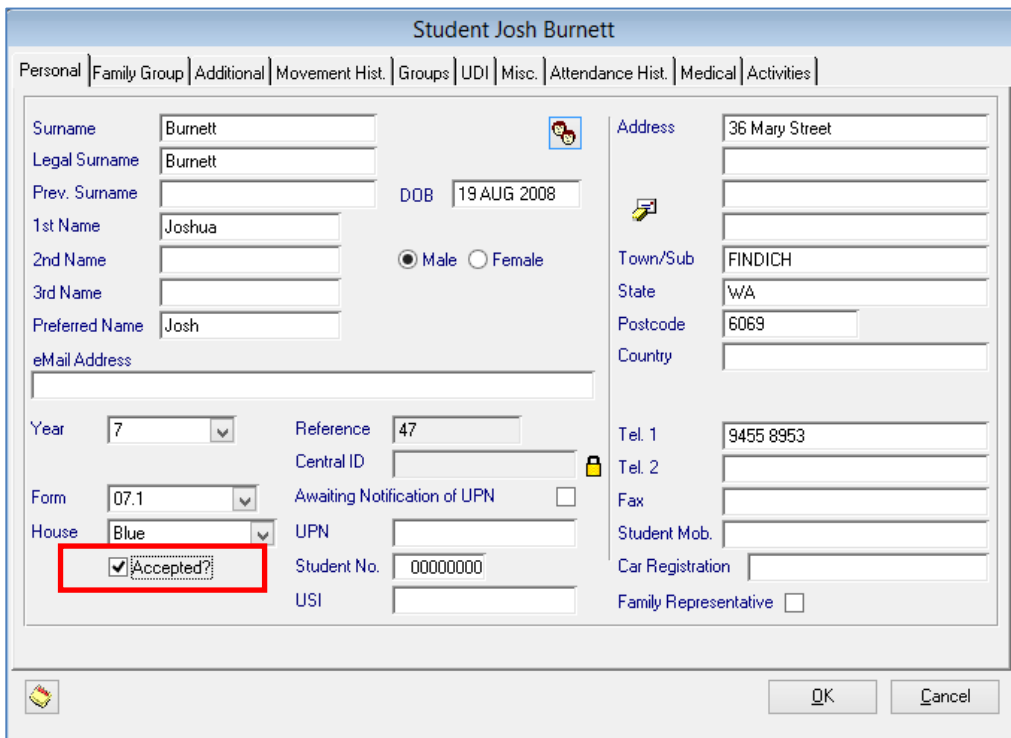
- Enter **Today's** date as **Date Checked**
- Select **Fully Completed** for the Vaccination Schedule
- Untick the **Measles Exclusion** box 
- Click **OK** to save the record
- Click **Yes** if a Timetabling message appears

## 4.2 Transfer Students from Admissions to the Current Roll

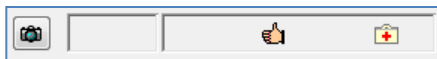
### Activity

Joshua is ready to start at the school. We can mark him as Accepted on the Admissions Roll.

- Click the Summary folder  to return to his home page
- Click Edit 
- Check **Accepted**



- Click **OK**
- View the Accepted Icon  on the Status Bar



- Close Student Details



## Admin > Utilities

- Double click **Admissions Transfer > Current Roll**

**Admissions Transfer to Current Roll**

This wizard will guide you through the process of transferring Admissions Roll students onto the Current Roll of your school.

Only those Admissions Roll students who have their 'Accepted?' checkbox ticked will be moved onto the Current Roll. This can be set either by editing the student within the Student Details area, or by selecting 'Acceptance Status (Admissions)' within Speed Edit.

Choose below how you would like to select the students to be transferred to the Current Roll.

☐ Transfer students with Acceptance Status of Yes, and Entry Date of

☒ Transfer all students with Acceptance Status of Yes, ignoring any Entry Dates that have been entered.  
Set the following Entry Date for all students who are transferred

Next student number will be 895

<< Back   Next >>   Cancel

- Select the second option (ignoring any entry dates) and leave TODAY as the **Entry Date**

**Note: If the first option 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.**

- Click **Next**

**Admissions Transfer to Current Roll**

The following students will be transferred to the Current Roll.

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

Ref.	Name	DOB	Gender	UPN	Entry Date	Transfer?
47	Josh Burnett	19 AUG 2008	Male			✓

Buttons: ✓, X

**Note: Students can be deselected if they have not arrived at school**

- Click **Finish** and **OK**
- Click **No** as we will not check for empty batches at this point

## General > Student Details

- Locate Joshua Burnett on the Current roll

## 4.3 Moving Students to the Former Roll


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

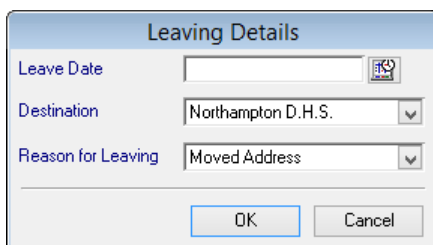
### 4.3.1 Moving an Individual Student to the Former Roll

#### Activity

Linda So is leaving the school today.

##### General > Student Details

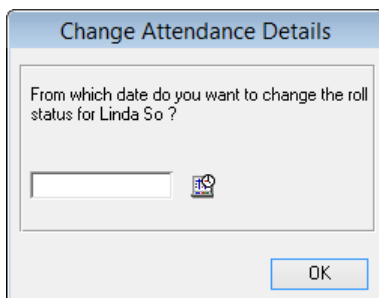
- Select the **Current Roll**
- Use the **Search** field to find **Linda So**
- Click on Move Student to Former Roll 
- Click **Yes** to move her to the Former Roll
- Leave the Leave Date as **TODAY** and enter the following details



The 'Leaving Details' dialog box contains the following fields and options:

- Leave Date:** A text field with a calendar icon.
- Destination:** A dropdown menu showing 'Northampton D.H.S.'
- Reason for Leaving:** A dropdown menu showing 'Moved Address'
- Buttons:** 'OK' and 'Cancel'

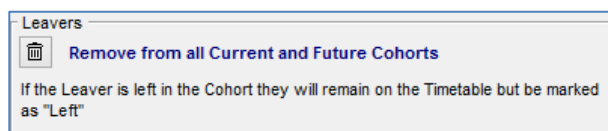
- Click **OK**
- Select **TODAY's** date regarding changes to the roll status (the default date is the date up to which Daily Records have been created)



The 'Change Attendance Details' dialog box contains the following elements:


- Title:** Change Attendance Details
- Text:** From which date do you want to change the roll status for Linda So ?
- Field:** A text field with a calendar icon.
- Button:** 'OK'

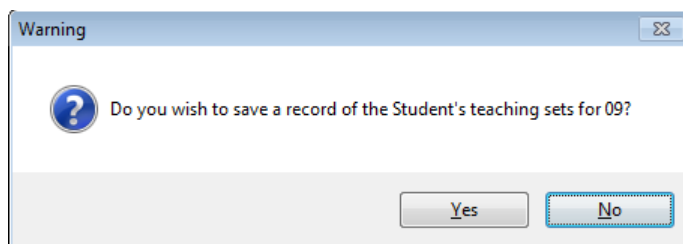
- Click **OK**



The 'Leavers' dialog box contains the following information:

- Icon:** A trash can icon.
- Action:** Remove from all Current and Future Cohorts
- Text:** If the Leaver is left in the Cohort they will remain on the Timetable but be marked as "Left"

- Remove her from her cohorts by clicking 



- Click **Yes**

***Note: Removing students from their cohorts in this way, enables the Timetabling module to keep a record of their teaching sets.***

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

### 4.3.2 Re-Admissions Form

The Re-Admissions Form can be printed for timetabled students who have been removed from their cohort by clicking on the bin when moving them to the Former Roll.

#### Activity:

##### Timetabling > Reports > O&M Reports –Students > Re-admissions Form

- Ensure the date range captures Linda So's Leaving Date
- Click **Find** and select **Linda So**

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

- Left Pane (Tree View):**
  - Data Validation Reports
  - Planning and Preparation Reports
  - O & M Reports - Timetable
  - O & M Reports - Students (Expanded)
    - Student Timetable by Date Range
    - Student Timetable by Grid
    - Student Load
    - Clearance Form
    - Student Course Information
    - Student Course Information Exp
    - Course Change Reports
    - Re-admissions Form** (Selected)
  - O & M Reports - Staff
  - O & M Reports - Rooms
  - O & M Reports - Teaching Sets
- Right Pane (Form Fields):**
  - Titles:**
    - Main Title: Re-admissions Form
    - Page Footer: (Empty)
  - Select:**
    - TT Year: 2019
    - Leaving Date Range:
      - From: (Empty)
      - To: (Empty)
  - Selected Students:**
    - 357 SO Linda
  - Buttons:** Remove, Find, Print, Cancel

- Click **Print**

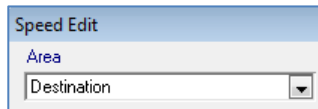
### 4.3.3 Moving Multiple Students to the Former Roll

## Activit

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

Admin > Speed Edit


- Select the **Area: Destination**

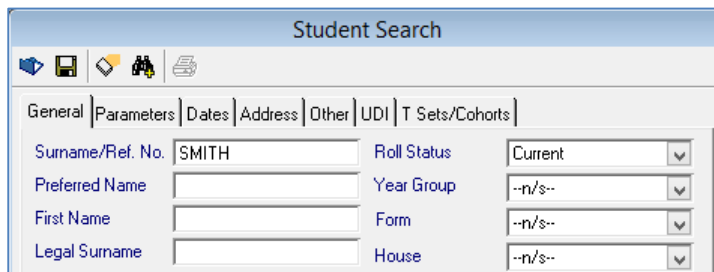


Speed Edit

Area

Destination

- Click Select Students 
- Type **Smith** in the **Surname/Ref. No** field



Student Search

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

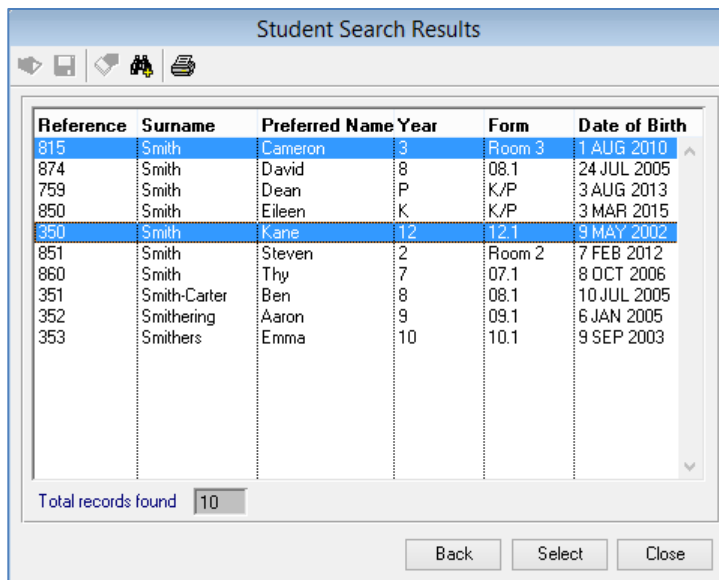
Surname/Ref. No. SMITH Roll Status Current

Preferred Name Year Group --n/s--

First Name Form --n/s--

Legal Surname House --n/s--

- Find the siblings **Cameron** and **Kane Smith**
- Highlight both students



Student Search Results


Reference	Surname	Preferred Name	Year	Form	Date of Birth
815	Smith	Cameron	3	Room 3	1 AUG 2010
874	Smith	David	8	08.1	24 JUL 2005
759	Smith	Dean	P	K/P	3 AUG 2013
850	Smith	Eileen	K	K/P	3 MAR 2015
350	Smith	Kane	12	12.1	9 MAY 2002
851	Smith	Steven	2	Room 2	7 FEB 2012
860	Smith	Thy	7	07.1	8 OCT 2006
351	Smith-Carter	Ben	8	08.1	10 JUL 2005
352	Smithering	Aaron	9	09.1	6 JAN 2005
353	Smithers	Emma	10	10.1	9 SEP 2003

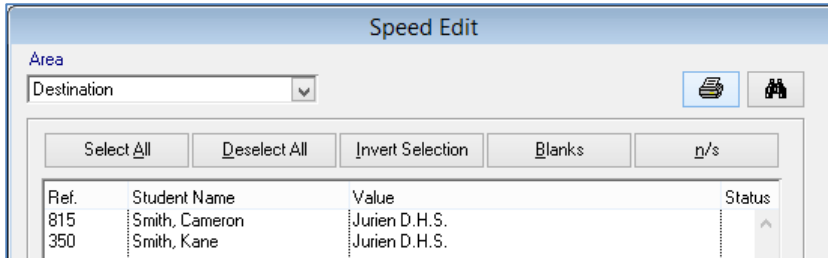
Total records found 10

Back Select Close

- Click **Select** then **Yes**

- Highlight both students in the Speed Edit window
- From the **New Value** menu, find **Jurien DHS**

- Click Apply Changes 
- Click **Save**, then **Yes**



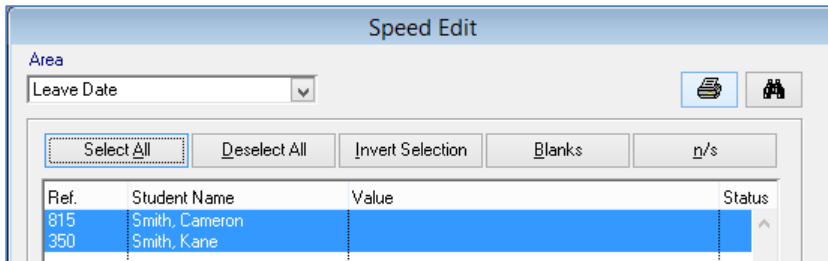
Speed Edit

Area: Destination

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
815	Smith, Cameron	Jurien D.H.S.	
350	Smith, Kane	Jurien D.H.S.	

- Change the **Area** drop down menu to **Leave Date**



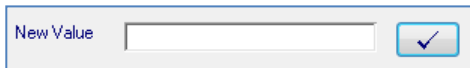
Speed Edit

Area: Leave Date


Select All Deselect All Invert Selection Blanks n/s


Ref.	Student Name	Value	Status
815	Smith, Cameron		
350	Smith, Kane		

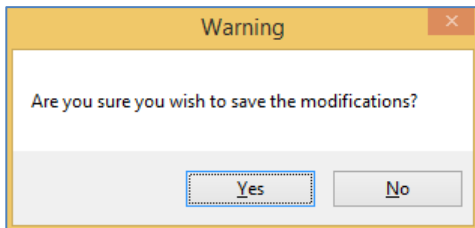
- Enter TODAY's date in the **New Value** field



New Value



- Highlight both students
- Click Apply Changes 
- Click **Save**



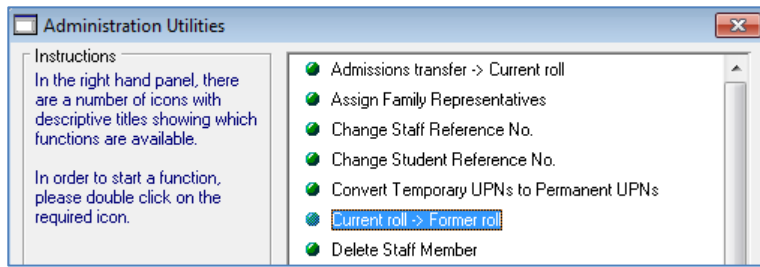
Warning

Are you sure you wish to save the modifications?

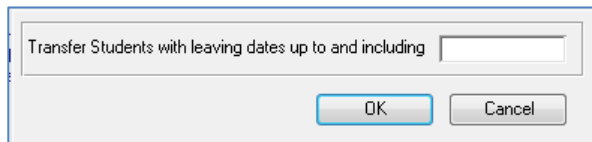
Yes No

- Click **Yes**
- Close Speed Edit

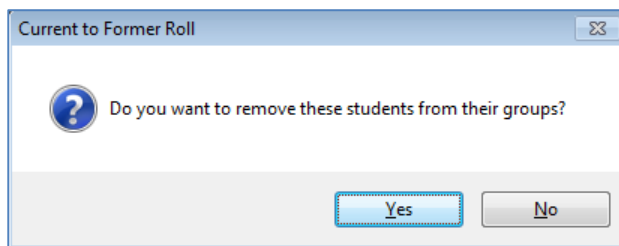
## Admin > Utilities



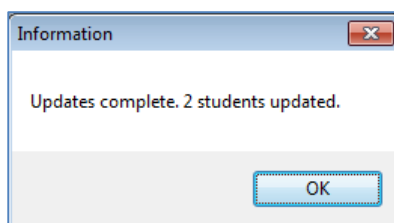
- Double-click **Current Roll > Former Roll**



- Enter TODAY's date as the students' **Leave Date**
- Click **OK** to moving the students
- Click Yes confirm you want to move them on these dates



- Click **Yes** to remove students from their Groups



## General > Student Details

- Locate **Cameron** and **Kane Smith** on the Former roll

**Note: Moving students to the Former roll in groups does not allow the option of saving a record of their teaching sets.**

## 4.4 Assigning Schools 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.

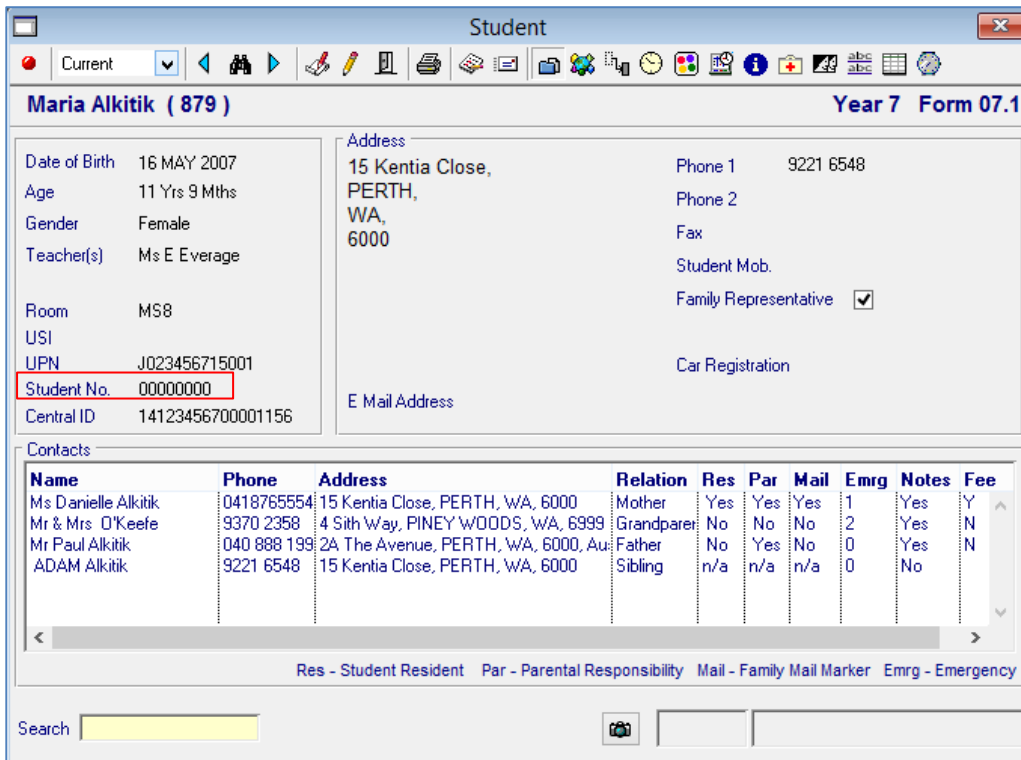
Opening this Utility allows you to apply SCSA Student Numbers to a year group.

### Activity

The Year 7 students do not have their SCSA Student Numbers. Before running the utility, we will check to make sure they have not been applied.

#### General > Student Details

- Click Student Search 
- Load all the Year 7's as a browse set



**Student**

Current

**Maria Alkitik ( 879 )** **Year 7 Form 07.1**

Date of Birth 16 MAY 2007  
Age 11 Yrs 9 Mths  
Gender Female  
Teacher(s) Ms E Everage  
Room MS8  
USI  
UPN J023456715001  
**Student No. 00000000**  
Central ID 14123456700001156

Address  
15 Kentia Close,  
PERTH,  
WA,  
6000  
E Mail Address

Phone 1 9221 6548  
Phone 2  
Fax  
Student Mob.  
Family Representative ☒  
Car Registration

Contacts

Name	Phone	Address	Relation	Res	Par	Mail	Emrg	Notes	Fee
Ms Danielle Alkitik	0418765554	15 Kentia Close, PERTH, WA, 6000	Mother	Yes	Yes	Yes	1	Yes	Y
Mr & Mrs O'Keefe	9370 2358	4 Sith Way, PINEY WOODS, WA, 6999	Grandparent	No	No	No	2	Yes	N
Mr Paul Alkitik	040 888 199	2A The Avenue, PERTH, WA, 6000, Au	Father	No	Yes	No	0	Yes	N
ADAM Alkitik	9221 6548	15 Kentia Close, PERTH, WA, 6000	Sibling	n/a	n/a	n/a	0	No	

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

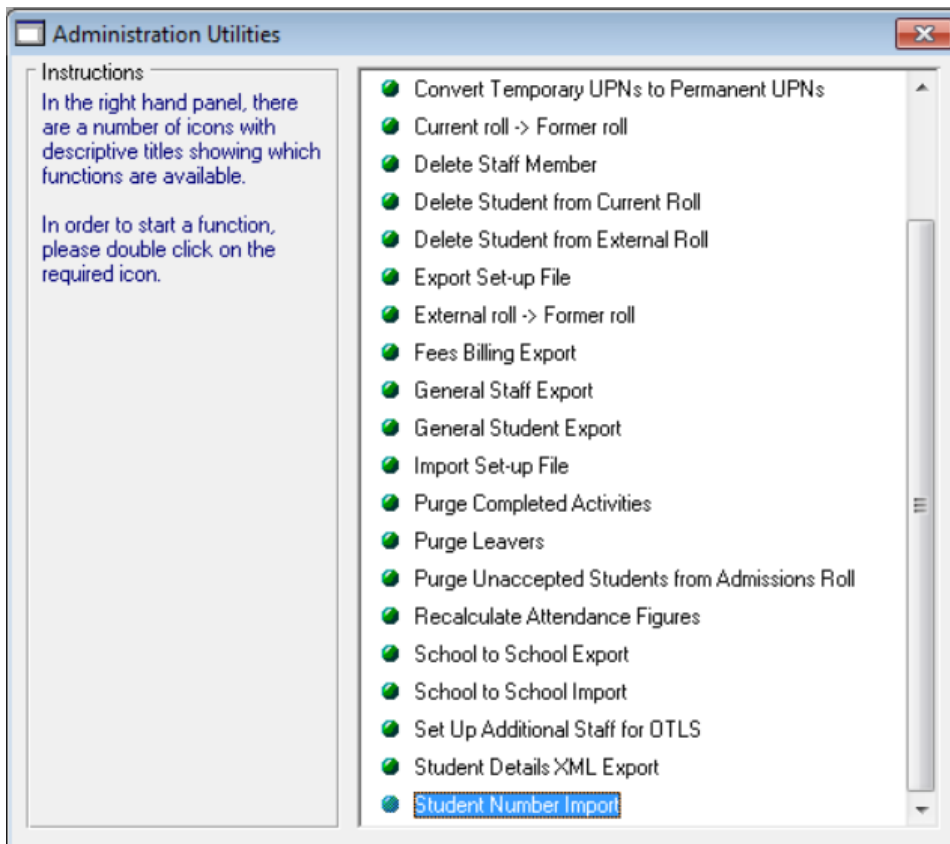
Search

- Scroll through and view the student numbers are 00000000

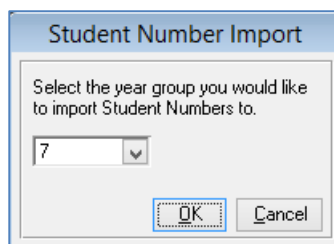


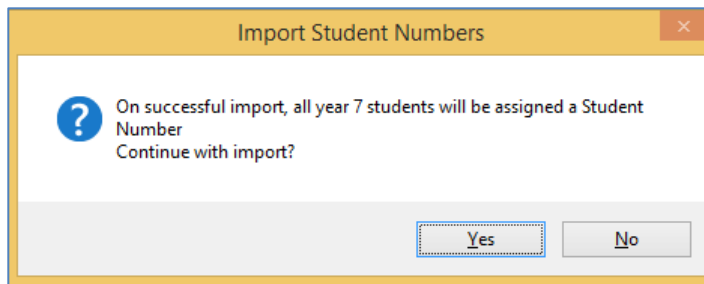
## Activity

### Admin > Utilities > Student Number Import

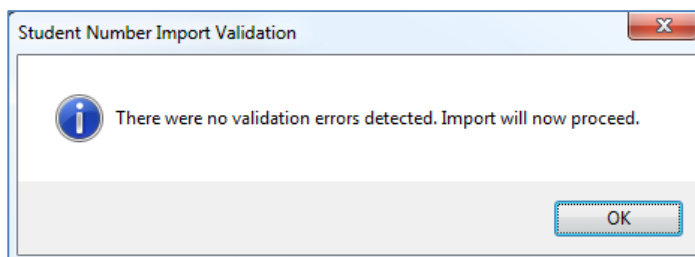
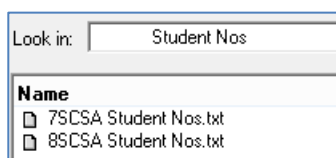


- Select **Year 7** from the drop down list and click **OK**

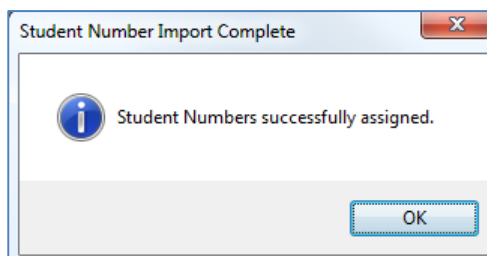
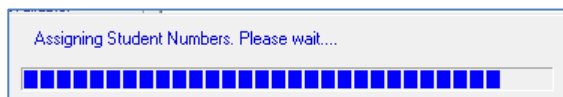




- Click Yes
- Navigate to **C:/keys/Integris/Inbox/StudentNos**
- Highlight the **7CCNos** text file and click **Open**



- Click **OK** to the Validation message
- The import will commence



- Click **OK**
- View the Year 7s SCSA Student Numbers through **Student Details**

## 5 Exporting and Importing Student Data

It is important that all schools use the SIS School to School Export and Import processes to enrol new students.

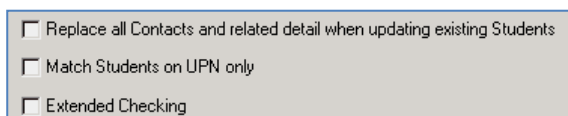
It is possible to electronically export and import student data without losing any information or the information being overwritten.

The data transfer procedure consists of 2 steps

Step 1 Feeder school completes the School to School Export of student administration data. This file is emailed to the receiving school for importing.

Step 2 Receiving school completes the School to School Import of student administration data.

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 and what data is retained or overwritten according to the selections made.



☐ Replace all Contacts and related detail when updating existing Students  
☐ Match Students on UPN only  
☐ Extended Checking

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

***Match Students on UPN only***–recommend leaving this un-checked.

***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 the exporting school has ticked the ☐ Retain on transfer box for behaviour records). These records will be in grey in the Behaviour Management screen for the student
- If using the **Student Details XML Export Utility**, schools may elect to export **ALL Behaviour Records** or only those marked as **Retain on Transfer**
- Attendance records summary

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

### Transfer of data between primary and secondary schools in preparation for end of year

Student data is usually transferred to the secondary school 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 the production of contributions and charges information. This means that the process may be spread over a number of terms.

### Transfer between schools during the year

The process is used when a student or students move between schools during the school year.

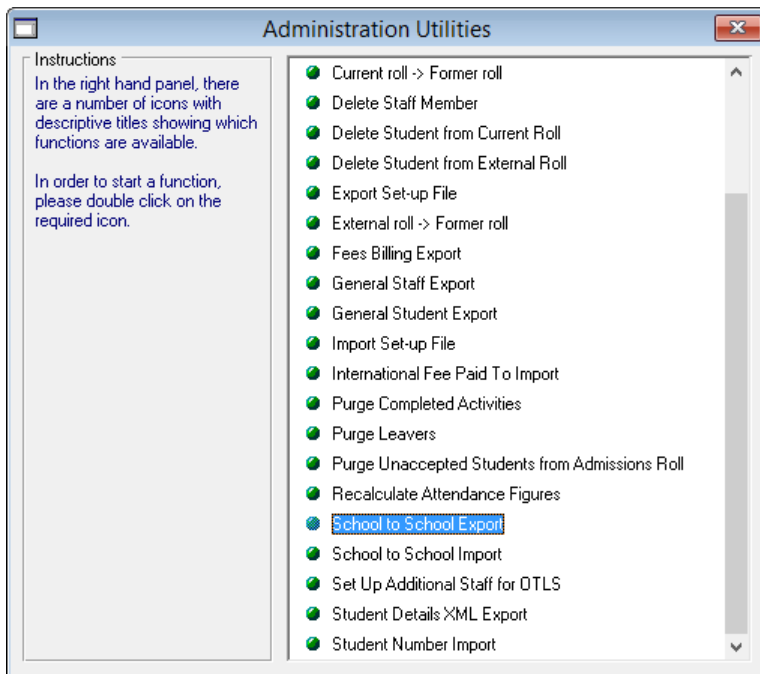
**Note: In all cases, students should be enrolled onto the Admissions Roll and then transferred to the Current Roll upon arrival at the destination school.**

## 5.1 Exporting Student Information

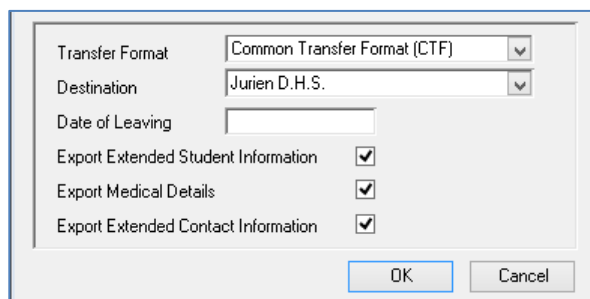
### 5.1.1 School to School Export

#### Activity

##### Admin > Utilities

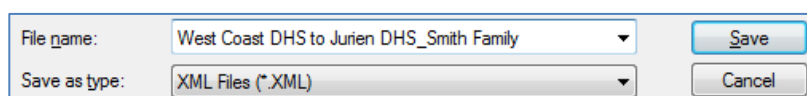


- Double click on **School to School Export**
- Enter the Destination of **Jurien DHS** and TODAY'S date as the **Date of Leaving**
- Ensure each of the Export options are checked

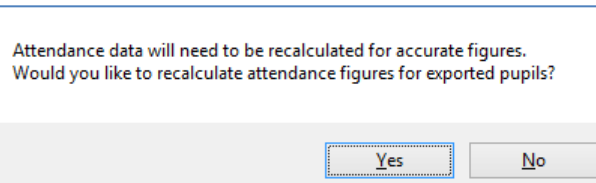


- Click **OK**
- Give the export file a name, for example **West Coast DHS to Jurien DHS\_Smith family**

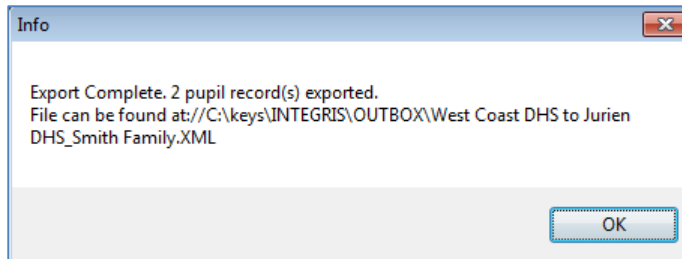
**Note: This is the Department of Education's recommended protocol for naming Admin export files.**



- Click **Save**



- 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**

**Note: This activity can be completed because the Smith family had already been given a Leave Date, Destination and moved to the Former Roll.**

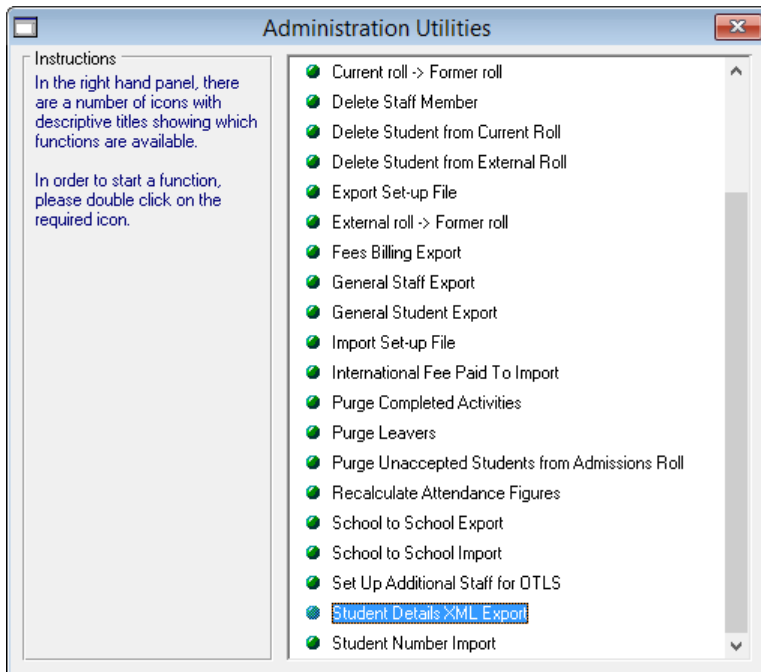
### 5.1.2 Students Details XML Export

Usually a school will export student data using the School to School Export function as outlined above. The Student Details XML Export allows student details to be exported without students requiring a leave date or destination, that is the students remain in the system but their export file can be emailed from the location to which it has been saved.

Schools can elect to do a Full Export or Partial Export of student data if using the Student Details XML Export. If selecting a Partial Export schools may choose to export ALL Behaviour Records or only those that have been marked as Retain on Transfer.

## Activity

### Admin > Utilities > Student Details XML Export



- Click  Find Students
- Enter the following information to locate Linda So

The 'Student Search' window shows search criteria: Surname/Ref. No. 'SO' and Roll Status 'Former'.

- Click **Find**

The 'XML Export' window displays the following student details:

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

- Click **Next**
- Select **Partial Export**
- Check Attendance History and All Behaviour Records
- Enter the **Destination** of **Northampton D.H.S**



The XML Export dialog box is titled "XML Export" and includes a close button (X). It features a logo with a red arrow and a hard drive icon. The text reads: "This utility allows you to generate an XML export file of students in the Common Transfer Format (CTF)."

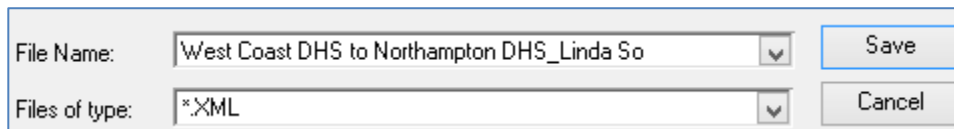
Below this, a message states: "You must specify whether you would like to perform a Full Export containing all possible export sections, or a Partial Export which may contain just the Attendance History or Behaviour sections. You must also select the Destination School that will be receiving this file."

The "Export Type" section has two radio buttons: "Full Export" (unselected) and "Partial Export" (selected). To the right of these are three unchecked checkboxes: "Export Extended Student Information", "Export Medical Details", and "Export Extended Contact Information".

Below the radio buttons are two checked checkboxes: "Attendance History" and "All Behaviour Records". There is also an unchecked checkbox for "Behaviour Records (Retain on transfer only)".

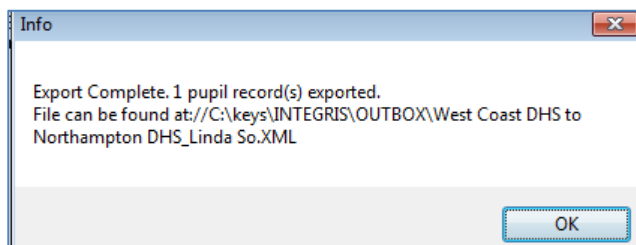
The "Destination School" is selected from a dropdown menu showing "/4093 - Northampton D.H.S.". At the bottom are three buttons: "<< Previous", "Export", and "Cancel".

- Click **Export**
- The export file should be saved to the outbox



The Save dialog box shows the "File Name" field with the text "West Coast DHS to Northampton DHS\_Linda So" and a dropdown arrow. To the right is a "Save" button. Below this, the "Files of type" field is set to "\*.XML" with a dropdown arrow, and a "Cancel" button is to its right.

- 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



The Info dialog box is titled "Info" and contains the following text: "Export Complete. 1 pupil record(s) exported. File can be found at: //C:\keys\INTEGRIS\OUTBOX\West Coast DHS to Northampton DHS\_Linda So.XML". At the bottom right is an "OK" button.

- Click **OK** and close the Transfer window by clicking **Cancel**

The export file may now be sent to the destination school as an email attachment.

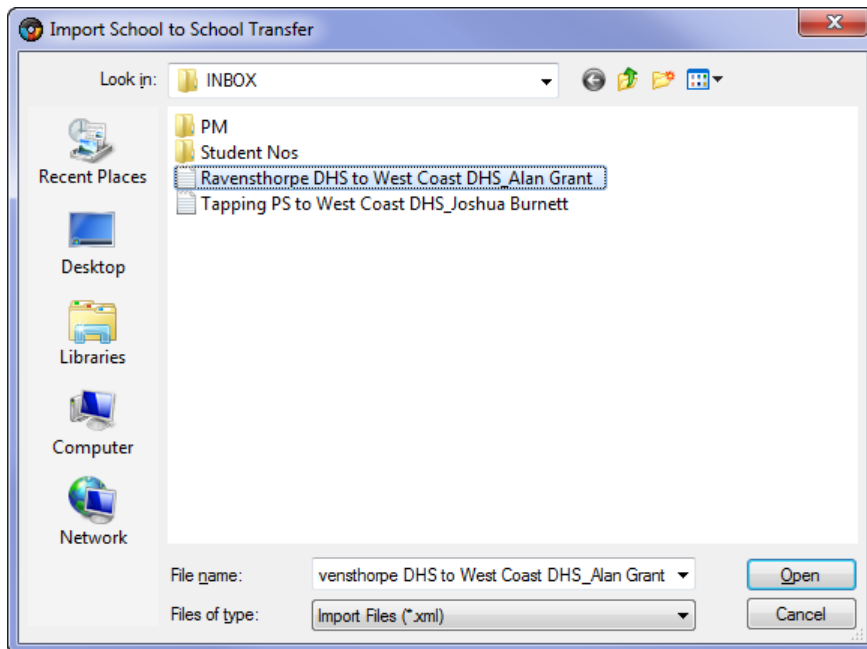


## 5.2 Importing Student Data


### 5.2.1 School to School Import to the Admissions Roll

#### Activity

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



- Highlight the file ***Ravensthorpe DHS to West Coast DHS\_Alan Grant*** and click ***Open***
- Leave ***Admissions*** selected

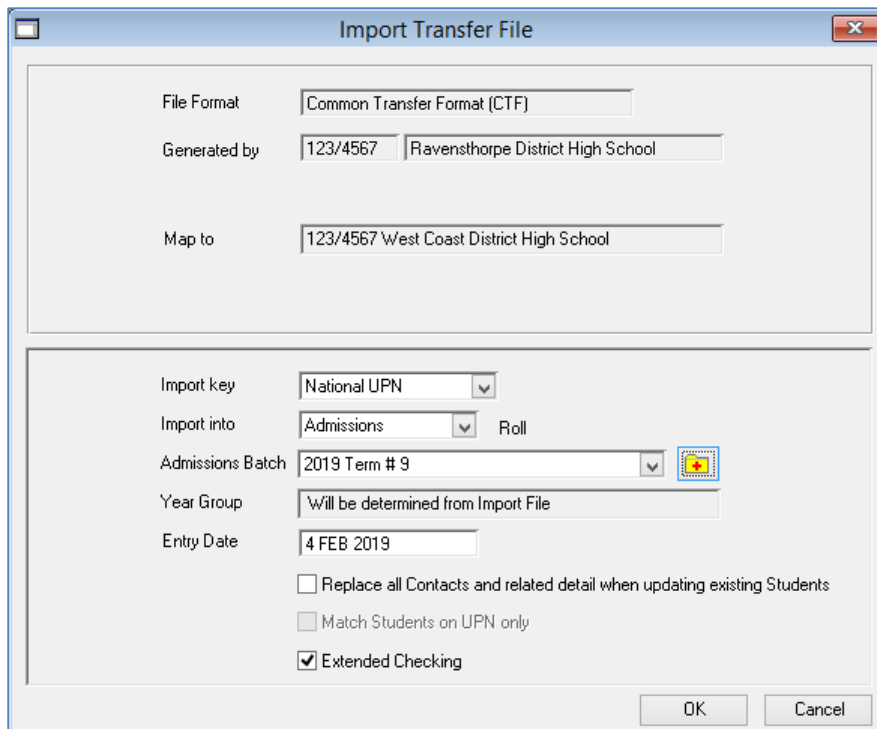
Import key	National UPN	
Import into	Admissions	Roll
Admissions Batch	n/s	

- Click Add 
- Give the Batch an appropriate name and click ***OK***

New Batch	
Please enter the name of the batch	
<input type="text" value="2019 Term #"/>	
<input type="button" value="Cancel"/>	<input type="button" value="OK"/>

- Leave the ***Entry Date*** as TODAY
- Check ***Extended Checking*** (this ensures that possible duplicate records may be displayed)

<input type="checkbox"/> Replace all Contacts and related detail when updating existing Students
<input type="checkbox"/> Match Students on UPN only
<input checked="" type="checkbox"/> Extended Checking

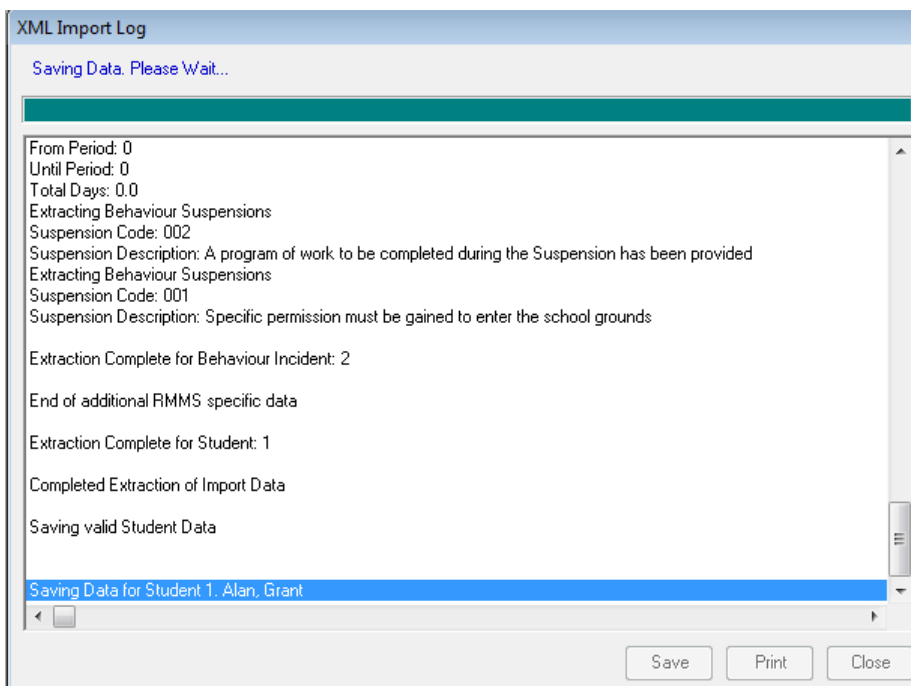


The 'Import Transfer File' dialog box contains the following fields and options:

- File Format:** Common Transfer Format (CTF)
- Generated by:** 123/4567 Ravensthorpe District High School
- Map to:** 123/4567 West Coast District High School
- Import key:** National UPN
- Import into:** Admissions Roll
- Admissions Batch:** 2019 Term # 9
- Year Group:** Will be determined from Import File
- Entry Date:** 4 FEB 2019
- ☐ Replace all Contacts and related detail when updating existing Students
- ☐ Match Students on UPN only
- ☒ Extended Checking

Buttons: OK, Cancel

- Click **OK**



The 'XML Import Log' window displays the following text:

Saving Data. Please Wait...

---

From Period: 0  
 Until Period: 0  
 Total Days: 0.0  
 Extracting Behaviour Suspensions  
 Suspension Code: 002  
 Suspension Description: A program of work to be completed during the Suspension has been provided  
 Extracting Behaviour Suspensions  
 Suspension Code: 001  
 Suspension Description: Specific permission must be gained to enter the school grounds

Extraction Complete for Behaviour Incident: 2

End of additional RMMS specific data

Extraction Complete for Student: 1

Completed Extraction of Import Data

Saving valid Student Data

Saving Data for Student 1, Alan, Grant

Buttons: Save, Print, Close

- 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.

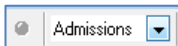
- **Close** the Import Log and Utilities

## 5.3 Moving Students to the Current Roll


### Activity

#### General > Student Details

- Locate **Alan Grant** on the **Admissions** roll


 Admissions


Search

- Click Edit 
- Enter his **Form** and new address and telephone details as shown below
- Check **Accepted** ☒ Accepted?

Student Alan Grant


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

Surname	Grant		Address	53 Brighton Road	
Legal Surname	Grant				
Prev. Surname			DOB	24 AUG 2005	
1st Name	Alan				
2nd Name					
3rd Name		<input checked="" type="radio"/> Male <input type="radio"/> Female	Town/Sub	SCARBOROUGH	
Preferred Name	Alan		State	WA	
eMail Address				Postcode	6019
				Country	
Year	7	Reference	48	Tel. 1	9446 6120
Form	07.1	Central ID	19123456700001173	Tel. 2	
House	Blue	Awaiting Notification of UPN	<input type="checkbox"/>	Fax	
<input checked="" type="checkbox"/> Accepted?		UPN	A000409807001	Student Mob.	
		Student No.	00000000	Car Registration	
		USI		Family Representative	<input checked="" type="checkbox"/>

 OK Cancel

- Click **OK**

Warning

 The vaccination schedule field is currently blank for this student. You are required to select one of the six categories from the drop-down box. For further information refer to the [Guidelines for recording and managing student immunisation data.](#)

Do you wish to continue?  
Click Yes to save, or No to edit the record.

Yes No

- Click Yes
- Close Student Details

## Admin > Utilities

- Double click **Admissions Transfer > Current Roll**

**Admissions Transfer to Current Roll**

This wizard will guide you through the process of transferring Admissions Roll students onto the Current Roll of your school.

Only those Admissions Roll students who have their 'Accepted?' checkbox ticked will be moved onto the Current Roll. This can be set either by editing the student within the Student Details area, or by selecting 'Acceptance Status (Admissions)' within Speed Edit.

Choose below how you would like to select the students to be transferred to the Current Roll.

☐ Transfer students with Acceptance Status of Yes, and Entry Date of

☒ Transfer all students with Acceptance Status of Yes, ignoring any Entry Dates that have been entered.  
Set the following Entry Date for all students who are transferred

Next student number will be 896

<< Back   Next >>   Cancel

- Select the second option (ignoring any entry dates) and leave TODAY as the **Entry Date**

**Note: If the first option 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.**

- Click **Next**

**Admissions Transfer to Current Roll**

The following students will be transferred to the Current Roll.

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

Ref.	Name	DOB	Gender	UPN	Entry Date	Transfer?
48	Alan Grant	24 AUG 2005	Male	A000409807001	26 FEB 2019	✓

**Note: Students can be deselected from this window if they have not arrived at school**

- Click **Finish** and **OK**
- Click **No** as we will not check for empty batches

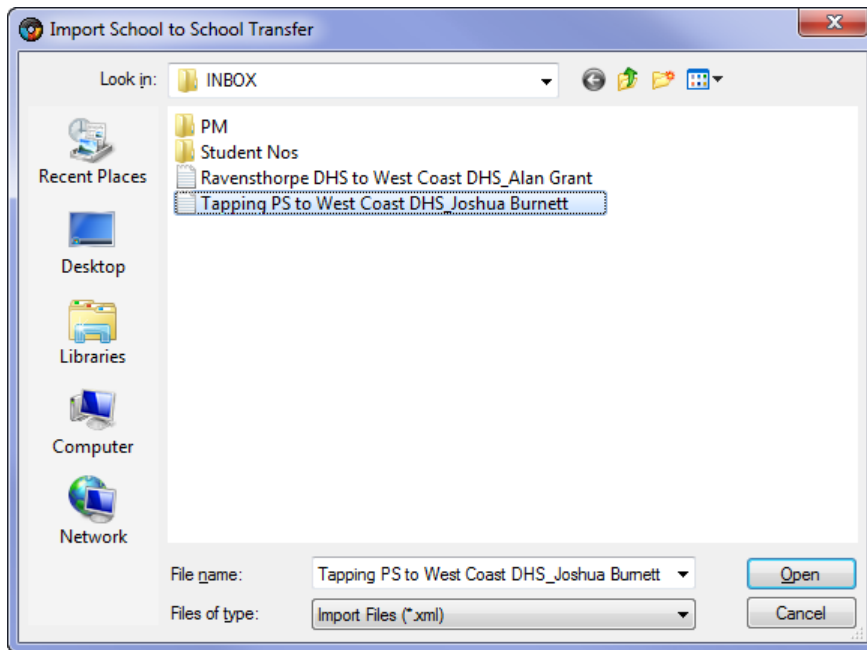
## General > Student Details

- Locate **Alan Grant** on the Current roll

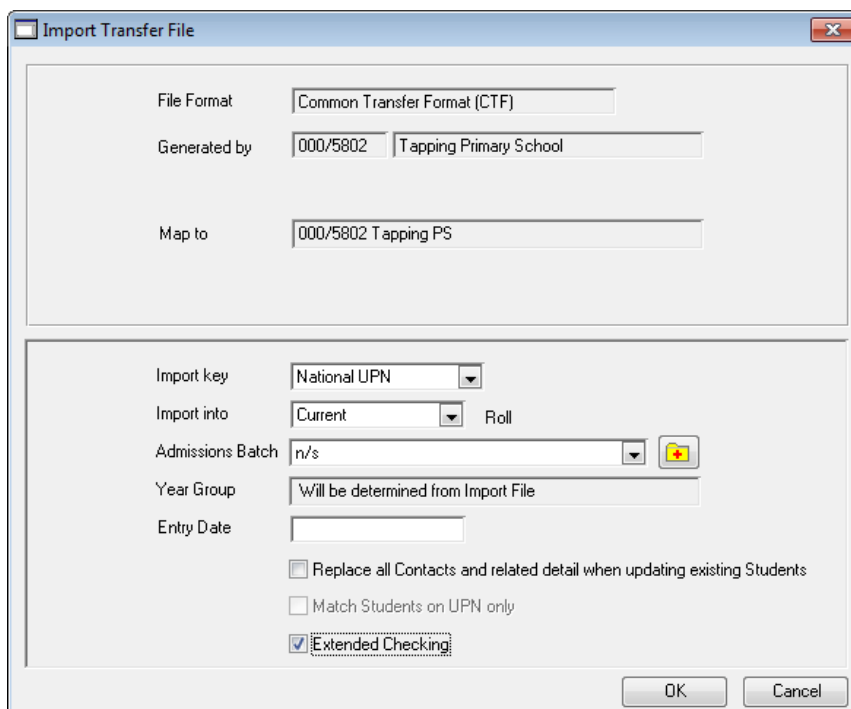
### 5.3.1 School to School Import to the Current Roll

## Activity

### Admin > Utilities > School to School Import



- Select the file for ***Tapping to West Coast\_Joshua Burnett*** and click ***Open***
- Change ***Import into*** to ***Current Roll***



- Leave the **Entry Date** as TODAY
- 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 student shown
- Select **Import into the selected existing student record, retaining the existing core details**

**Extended Import Checking for Possible Duplicates**

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

**Student in Import File**

UPN	Z123456710004	Date of Birth	19 AUG 2002
Surname	Burnett	Gender	Male
First Name	Joshua		

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

UPN	Surname	First Name	DOB	Gender	Roll	Year	Form
W023456715018	Burnett	Joshua	19 AUG 2002	Male	Current	7	07.1

**Action to be taken**

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

- Click **OK**

**Info**

Import Complete

- Click **OK** to Import Complete
- Close the window

A hard copy of the Transfer File may be printed by clicking the **Print** button

## General > Student Details

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

## 5.4 Advanced Admissions Batch Entry

Advanced Admissions Entry enables users to enter students in batches and then transfer the batch from the Admissions Roll to the current roll. Multiple students can be added to the batch as they apply for admission to the school. It is recommended that only basic information be entered in Advanced Admissions in event the student does not end up attending. The transfer process allows for the deselection of the student in the Transfer window if they have not arrived on their due start date and they will remain in the Transfer window until they either eventually arrive at the school or notification has been received that they will not be attending, whereby they can then be removed from the admissions list.

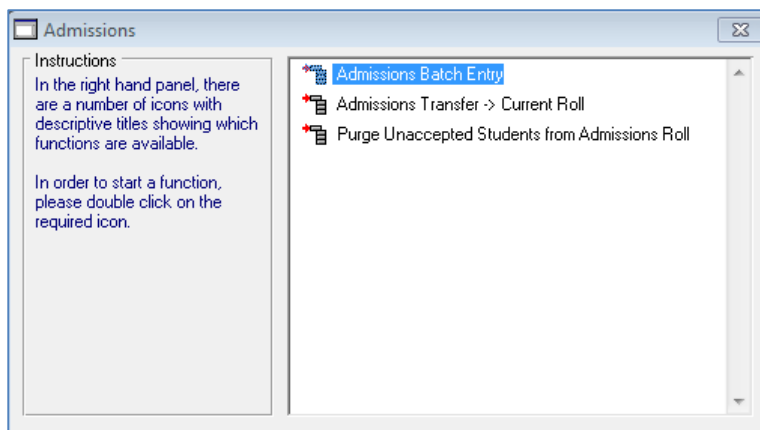
### Activity

There are two ways in which students can be entered using the Advanced Batch Entry function. The first option involves entering and editing details.

Madeline Crean is enrolling for next term. Her half-sister Helen Baverstock is already enrolled at the school. They have different fathers.

#### Admin > Admissions

- Double Click on **Admissions Batch Entry**



- Click **Add Batch** 
- Enter **2019 Term** (Next Term number)

Admissions Batch

No Batch selected

Student Details

Admission No: 0 Male Female

Surname:

First Name:

Preferred:

Date of B:

Year Gro:

Batch Me:

Admission:

**New Batch**

Please enter the name of the batch

2019 Term #

Cancel OK

Sort - this list can be sorted by clicking on the column headings.  
 Search - key \*x to jump to the first occurrence of 'x' in the list.  
 Then key + or - to move to the next / previous occurrence.

- Click **OK**

Click **Advanced Admissions Entry**

- Enter **Crean** in the Surname field

Surname: Crean

- Press **<Tab>** to move between the fields and the **Choose Sibling** window will display

Choose siblings

There are no students with matching surnames

Student Name	Reference	Year/Form

OK Cancel

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

General Parameters Dates Address Other U

Surname/Ref. No. BAVERSTOCK



**Clone Sibling Data**

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

---

Student Address: 12 St. Ettiene Gardens, ☒

Postcode: 6008 Phone 1: 9222 8754

Religion: ☒ Medical Practice: East Perth Medical Centre ☒

House: Green ☒ Doctor: Dr Carerra ☒

Health Card: NO ☒

---

Parent/Guardian 1: Mrs Hazel Baverstock

Relation: Mother Par: YES Res: YES Mail: YES Emrg: 1

Parent/Guardian 2: Mr Ron Baverstock

Relation: Father Par: YES Res: NO Mail: YES Emrg: 2 ☒

Other Contacts:


Name	Relation	Par	Res	Emrg
Mr Abe Steinway	Neighbour			3

- Click **Copy Data** to copy Helen Baverstock's details
- Continue to enter Madeline's details as shown below

**Advanced Admissions Entry**

Personal Info. | Parent/Guardian 1 | Parent/Guardian 2 | Emergency Contact | Additional Info. | Immunisation/Medical/New Details

---

Surname: Crean  Address: 12 St. Ettiene Gardens

Prev. Surname:

1st Name: Madeline

2nd Name:

3rd Name:

Preferred Name: Maddie

Town/Sub: WEST PERTH

State: WA

Postcode: 6008

Date of Birth: 24 JUL 2007

Tel. 1: 9222 8754

Tel. 2:

eMail:

☐ Male ☒ Female

Year: 7

Access Restriction: ☐

- Click on the **Parent Guardian 1** Tab
- Change the Relationship to **Stepmother** for Hazel Baverstock

- Click on the **Parent Guardian 2** Tab and edit the details as shown below

**Advanced Admissions Entry**

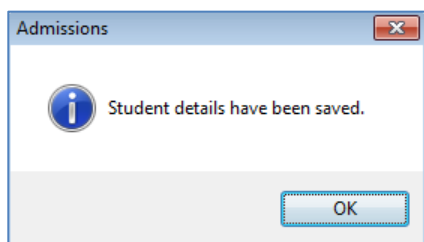
Personal Info | Parent/Guardian 1 | Parent/Guardian 2 | Emergency Contact | Additional Info | Immunisation/Medical/New Details

☐ No 'Parent/Guardian 2' for this student

Salutation: Mr Crean  
 Relationship: Father  
 Parental Responsibility: ☒ Student Resident: ☐  
 Family Mail Marker: ☐ Emergency: 2  
 Title: Mr Initials: P First Name: Peter  
 Surname: Crean  
 Occupation:   
 Work Name:   
 Work Phone:   
 Mobile: 0403 666 777  
 Address: 8 Whatley Crescent  
 Town/Sub: MT. LAWLEY  
 State: WA  
 Postcode: 6050  
 Main Lang OTE SAH: Not specified  
 Mainly speak English at home? ☐  
 School Education: Not stated/Unknown  
 Non-School Education: Not stated/Unknown  
 Occupation Group: Not stated or unknown

Clear OK Close

- Click **OK** to Save



- Click **OK**

**Admissions Batch**

Admissions Batch: 2019 Term 1

**Student Details**

Admission No: 49 ☐ Male ☒ Female

Surname: Crean

First Name: Madeline

Preferred Name: Maddie

Date of Birth: 24 JUL 2007

Year Group: 7

**Batch Members**

Admission No	First Name	Surname
49	Madeline	Crean

Sort - this list can be sorted by clicking on the column headings.  
 Search - key \*x to jump to the first occurrence of 'x' in the list.  
 Then key + or - to move to the next / previous occurrence.

**Note:** Data can be edited by using the Advanced Admissions Edit . Data can also be edited via Student Details > Admissions Roll.

The second option for entering students using the Admissions Batch Entry Function, is a quick way of entering bulk students using minimal information.

## Admin > Admissions

- In the Student Details window, click **Add Student**

**Student Details**

Admission No: 50 ☐ Male ☒ Female

Surname: Crean

First Name: Madeline

Preferred Name: Madeline

Date of Birth: 24 JUL 2002

Year Group: 7

The **Add Student** button (yellow plus icon) is highlighted with a red box.

- Enter the details as shown below

The screenshot shows the 'Admissions Batch' window. The 'Admissions Batch' dropdown is set to '2019 Term 1'. Under 'Student Details', the 'Admission No' is 0, 'Surname' is Pearce, 'First Name' is Emma, 'Preferred Name' is Emma, 'Date of Birth' is 1 MAY 2008, and 'Year Group' is 6. The gender is set to Female.

- <Tab>** or **<Enter>** to drop the details into the bottom window

Admission No	First Name	Surname
49	Madeline	Crean
50	Emma	Pearce

- Highlight a student to view their details or edit if necessary

The screenshot shows the 'Admissions Batch' window. The 'Admissions Batch' dropdown is set to '2019 Term 1'. Under 'Student Details', the 'Admission No' is 49, 'Surname' is Crean, 'First Name' is Madeline, 'Preferred Name' is Maddie, 'Date of Birth' is 24 JUL 2007, and 'Year Group' is 7. The gender is set to Female. The 'Batch Members' table is visible below, showing two students: Madeline Crean (Admission No 49) and Emma Pearce (Admission No 50). The first row is highlighted.

Sort - this list can be sorted by clicking on the column headings.  
 Search - key \*x to jump to the first occurrence of 'x' in the list.  
 Then key + or - to move to the next / previous occurrence.

- Close the Admissions Batch Entry Window

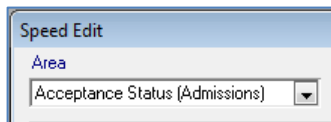
## 5.5 Moving Admissions Batch Students to the Current Roll

### Activity

Madeline Crean and Emma Pearce have been accepted as students at West Coast District High School.

#### Admin > Speed Edit


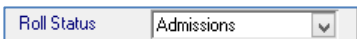

- From the Area menu, select **Acceptance Status (Admissions)**

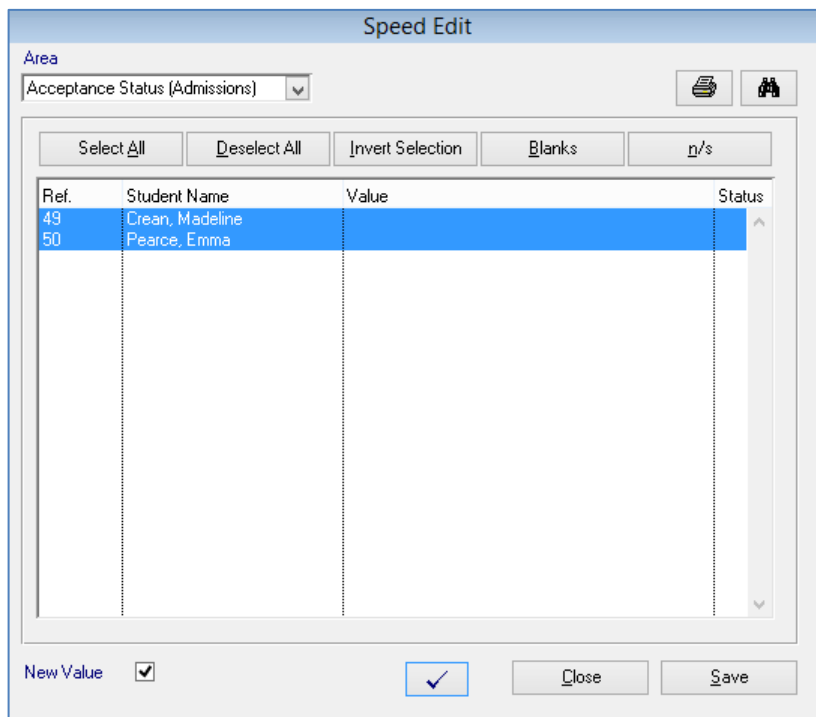


Speed Edit

Area

Acceptance Status (Admissions) ▼

- Click the  and select the **Admissions Roll** 
- Click 
- From the list of students, highlight **Madeline Crean** and **Emma Pearce**
- Click **Select** and **Yes**
- Highlight both students



Speed Edit




Area



Acceptance Status (Admissions) ▼

Select All Deselect All Invert Selection Blanks n/s

Ref.	Student Name	Value	Status
49	Crean, Madeline		
50	Pearce, Emma		

New Value ☒

- Tick the **New Value** box
- Click Apply Changes 
- Click  and **Yes** and **Close**

**Note:** Accepting students can also be done through **Student Details > Admissions Roll** and ticking the **Acceptance** box on each individual record.

## Admin > Utilities

- Double-click **Admissions Transfer** → **Current Roll**

**Admissions Transfer to Current Roll**

This wizard will guide you through the process of transferring Admissions Roll students onto the Current Roll of your school.

Only those Admissions Roll students who have their 'Accepted?' checkbox ticked will be moved onto the Current Roll. This can be set either by editing the student within the Student Details area, or by selecting 'Acceptance Status (Admissions)' within Speed Edit.

Choose below how you would like to select the students to be transferred to the Current Roll.

☐ Transfer students with Acceptance Status of Yes, and Entry Date of

☒ Transfer all students with Acceptance Status of Yes, ignoring any Entry Dates that have been entered.

Set the following Entry Date for all students who are transferred

Next student number will be 899

<< Back   Next >>   Cancel

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

**Note: If the first option 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.**

- Click **Next**

**Admissions Transfer to Current Roll**

The following students will be transferred to the Current Roll.

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

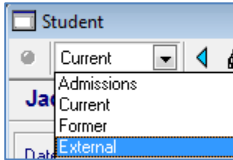
Ref.	Name	DOB	Gender	UPN	Entry Date	Transfer?
49	Maddie Crean	24 JUL 2007	Female			✓
50	Emma Pearce	1 MAY 2008	Female			✓

X

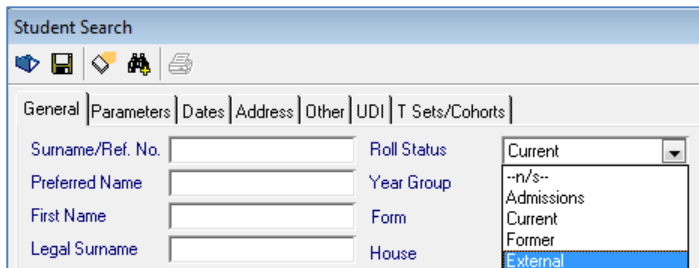
- Click **Finish**
- Click **Ok** to the **Transfer Complete** message
- Click **No** as you do not wish to check for Empty Batches

## 6 The External Roll

It is possible to enter essential information on 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.



When the external roll has been activated, it is possible to search the External Roll from the main student window or through the Find Student function

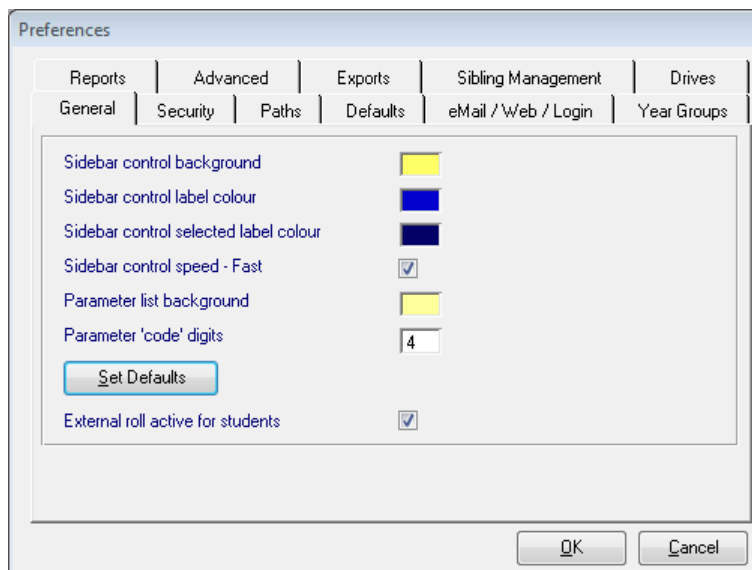


### 6.1 External Roll Active

#### Activity

**General > Control > Preferences > General tab**

- Check ***External roll active for students***



- Click ***OK***

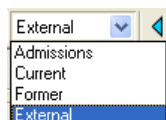
## 6.2 Adding a Student to the External Roll


### Activity

Justin Badley 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: **Badley**
  - He has no siblings at the school – Cancel the choose siblings window
  - First Name: **Justin**
  - DOB: **24/3/2008**
  - Gender: **Male**
  - Year: **7**
  - Form: **Form 7**
  - Address: **125 Watershed Road, FORRESTFIELD, WA, 6587**
  - Telephone: **08 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 Badley**



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

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

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

**Part Time Pattern**


Justin Badely

Attendance pattern for the week

Day	AM	PM
Monday		
Tuesday	✓	
Wednesday	✓	
Thursday		
Friday		

- Click **OK** and **OK** to Save


**Warning**

 The vaccination schedule field is currently blank for this student. You are required to select one of the six categories from the drop-down box. For further information refer to the [Guidelines for recording and managing student immunisation data](#).

Do you wish to continue?  
Click Yes to save, or No to edit the record.

- Click **NO** to continue to edit the record
- Change the Vaccination Schedule to **Not Provided**

**Immunisation Details**

Evidence provided ☐ Date Checked   Vaccination Schedule

- Click **OK** to save the record

## 7 Mail Merge

### 7.1 Introduction to 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

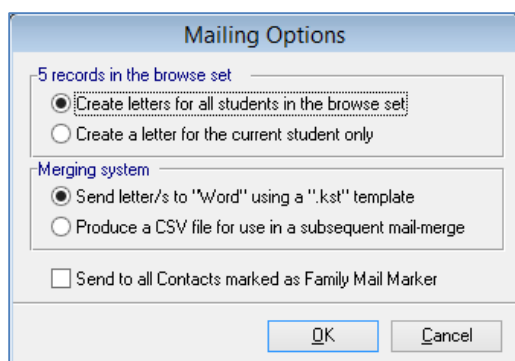
The first is by way of using mail merge fields available through the database. The Integris database is supplied with a mail merge function whereby administrative details such as students' names and addresses can be dynamically embedded into a MS Word template. These can then be saved as school letters.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

#### Option 2

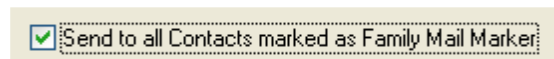
The second way is to create an export file into MS Word, which then allows users to use the MS Word mail merge functions to create their letters or other documents such as address labels.

#### 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 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).

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

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

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


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

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

## 7.2 Mail Merge: kst format

Using the kst method, the user creates a letter template prior to selecting contacts to whom 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).

### 7.2.1 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		
25 June 2013 (note – this is a Word Date field. It can be used in your letter templates)		
Field Name	Displays	Notes
Known Name(UK)	<KnownName>	Student Details
Preferred Name(Australia)	<PreferredName>	
First Name	<FirstName>	
Second Name <span>New!</span>	<SecondName>	
Surname	<Surname>	
Legal Surname	<LegalSurname>	
DOB	<DOB>	
Age	<Age>	
Year/Class (UK)	<Year/Class>	
Year/Form (Australia)	<Year/Form>	
Class (UK)	<Class>	
Form (Australia)	<Form>	
Class Tutor 1(UK)	<Tutor1>	
Class Tutor 2(UK)	<Tutor2>	
Form Teacher 1(Australia)	<Teacher1>	
Form Teacher 2(Australia)	<Teacher2>	
Year	<Year>	
SEN Stage	<SENStage>	
House	<House>	
Ethnicity (UK)	<Ethnicity>	
Indigenous Status (Australia)	<Indigenous Status>	
Religion	<Religion>	
Mother Tongue <span>New!</span>	<MotherTongue>	
Previous School	<PrevSch>	
Entry Date	<EntryDate>	
Destination School	<DestSch>	
Leave Date	<LeaveDate>	
CentrisID	<CentrisId>	Student Address details
Reference	<Reference>	
UPN <span>New!</span>	<UPN>	
ExamCandNo (UK)	<Exam No.>	
Student Number (Australia)	<Student No.>	
Email	<Email>	Student Address details
Phone 1 <span>New!</span>	<Phone1>	
Student Address (Line)	<StuAddressLine>	
Student Address (Block)	<StuAddressBlock>	
Student Address (Split)	<StuAddShortBlock> <StuAddTown> <StuAddCountyState> <StuAddPostcode> <StuAddCountry>	

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

- Open a new Microsoft Word document (This will be used for the letter template.)
- Type the body of the letter.

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

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

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

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


## Activity

A sample letter can be found on page 17 of the Administration Manager Supplement.

- Navigate to **C:\Keys\Integris\MMTPL\Letters** to open **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:

- View how **<Surname>** appears in **Student.kst**
- Type **<Surname>** into your Transfer Note



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.**


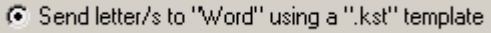
- Continue to copy and paste, or type merge fields into your transfer note (Hint: Use the example in the Administration Manager Supplement on page 24).
- When all merge fields have been added **File > Save As**
- Enter the file name as **"Transfer Note.kst"**

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

- Click **Save**

## 7.2.2 Using the kst template to create letters

### General > Student Details

- Load a browse set of students to whom the letter will be sent
- Click Send Letter 
- Select the **".kst"** option 
- Make other selections as appropriate
- Click **OK**
- Navigate your way to the folder where the letter template has been stored
- Double click on the name of the template, for example **transfer note.kst**

If any editing needs to take place:

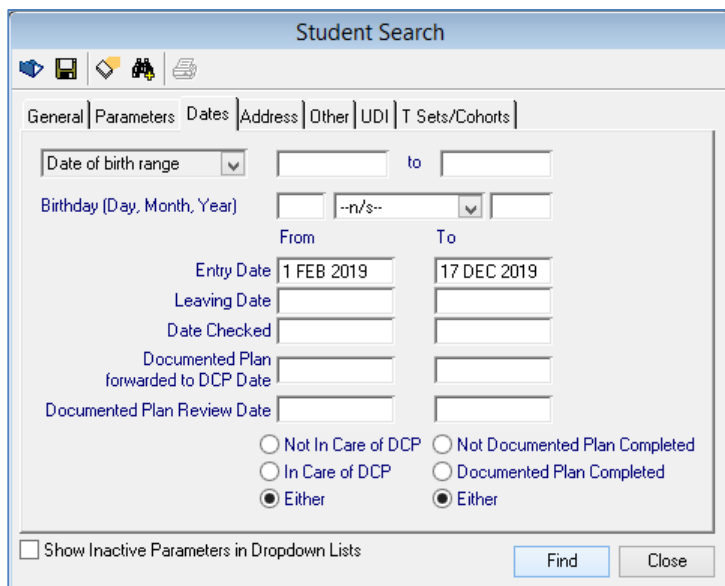
- Open MS Word and open the template document
- Make and save any changes, close the template and use it again

## Activity


### General > Student Details

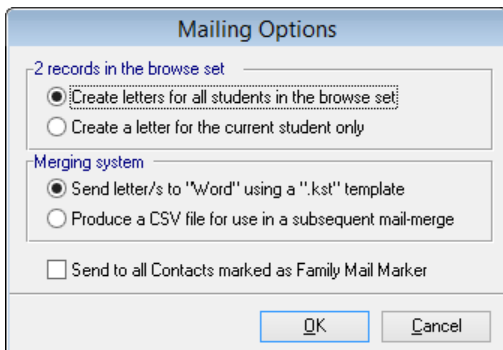
Send Transfer Notes for the students who started at West Coast District High School this year.

- Find  the students with an entry date of this year.



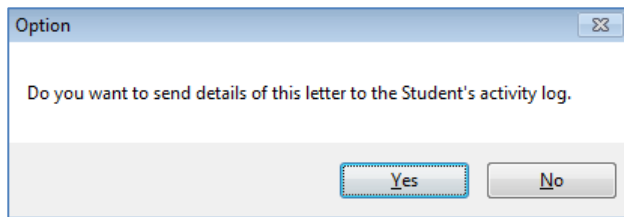
The 'Student Search' dialog box is shown with the 'General' tab selected. It contains various search criteria fields. The 'Entry Date' field is set to '1 FEB 2019' and the 'Leaving Date' field is set to '17 DEC 2019'. The 'Documented Plan' section has radio buttons for 'Not In Care of DCP', 'In Care of DCP', 'Not Documented Plan Completed', and 'Documented Plan Completed'. The 'Either' option is selected for both 'Documented Plan' and 'Documented Plan Review Date'. There is a checkbox for 'Show Inactive Parameters in Dropdown Lists' and 'Find' and 'Close' buttons at the bottom.

- Click Send Letter 
- Select the following options




The 'Mailing Options' dialog box is shown. It has a section for '2 records in the browse set' with two radio buttons: 'Create letters for all students in the browse set' (selected) and 'Create a letter for the current student only'. Below this is the 'Merging system' section with two radio buttons: 'Send letter/s to "Word" using a ".kst" template' (selected) and 'Produce a CSV file for use in a subsequent mail-merge'. There is also a checkbox for 'Send to all Contacts marked as Family Mail Marker' and 'OK' and 'Cancel' buttons at the bottom.

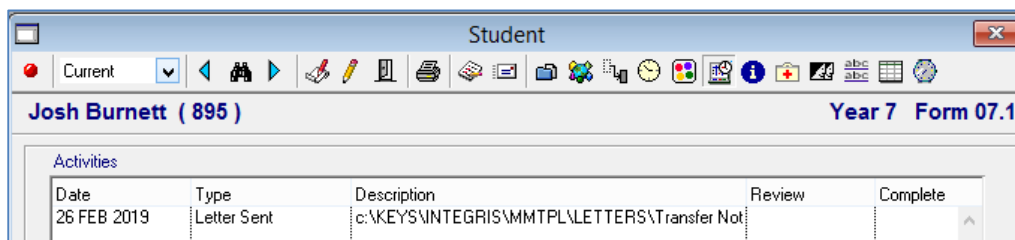
- Click **OK**
- Select **Transfer Note.kst**
- Click **Open**
- Check the Transfer Note has merged correctly



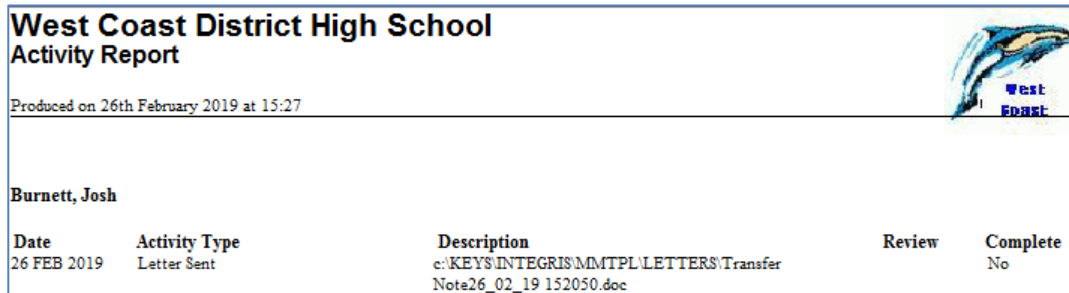
- Click **Yes**
- View the Transfer Notes
- Close the Transfer Notes

## DO NOT CLOSE WORD


- Click Student Activity 
- View the new students' records



- Highlight the Transfer Note and click **Print**



Details for the Transfer Note are displayed

- Close the Transfer Note and click  **Open Sent Letters in MS Word**
- Close Student Details



## 7.3 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.

#### 7.3.1 Create an Export (.csv) File

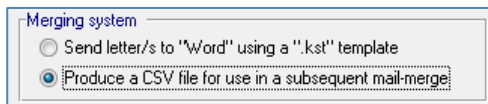
- **Find** the student/s for whom you wish to send a letter

This creates a browse set.

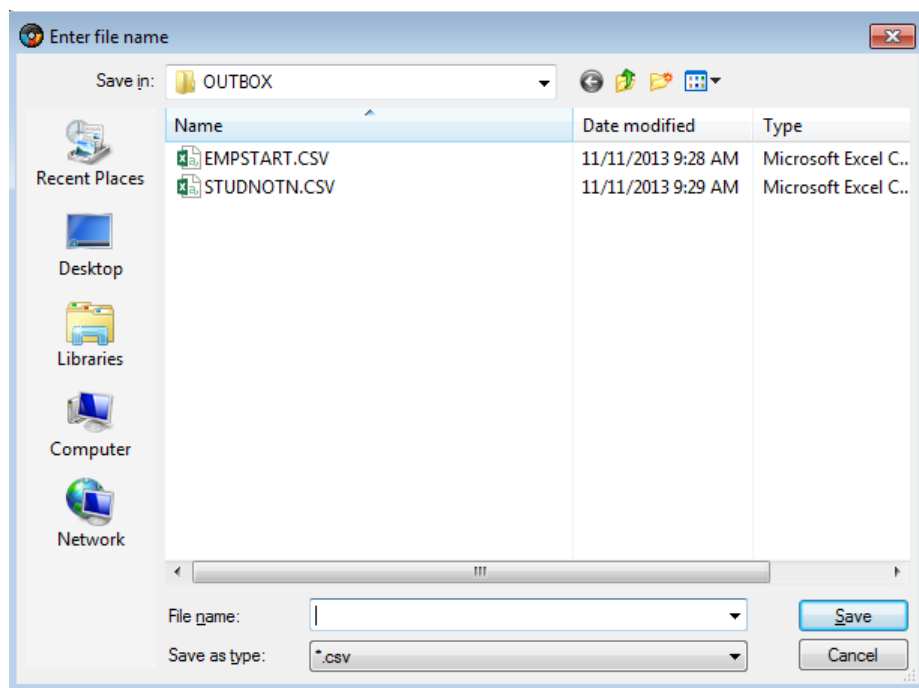
- Click **Send Letter**  in the Student Details window

The Mailing Options window opens.

- Select the **CSV** option



Click **OK**



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

This file can now be used in Microsoft Word, or other word processing packages, to create letters, labels or other merged items.

## Activity:

### General > Student Details

- Find  the **Senior Choir**

**Student Search**

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

Surname/Ref. No.  Roll Status

Preferred Name  Year Group

First Name  Form

Legal Surname  House

Group Type

Group

Contact Surname

Global Name Search

Terms in School

☒ Not Specified

☐ More than

☐ Less than

☐ Equal to

☐ Show Inactive Parameters in Dropdown Lists

Find Close


- Select All** the students from the list

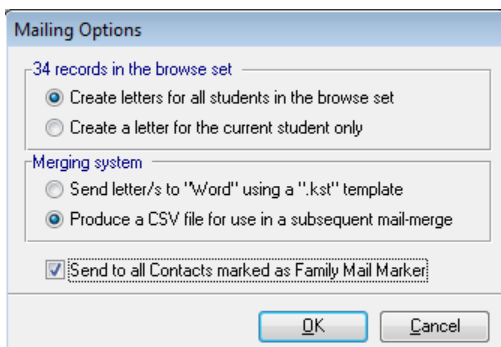
**Student Search Results**

Reference	Surname	Preferred Name	Year	Form	Date of Birth
7	Aspinall	Simone	9	09.2	15 MAR 2005
12	Bennett	Tracey	9	09.3	11 MAY 2005
17	Bloggs	Merika	9	09.1	15 MAR 2005
22	Braddon	Braydie	9	09.2	15 MAR 2005
27	Busuttil	Sacha	9	09.3	6 JAN 2005
29	Campbell	Ashleigh	11	11.2	3 APR 2003
31	Carless	Matthew	8	08.3	13 DEC 2005
32	Carter	Christine	9	09.1	15 MAR 2005
37	Clark	Gemma	9	09.2	21 NOV 2004
42	Cunliffe	Aaron	9	09.3	27 OCT 2004
47	Dent	Kaitlyn	9	09.1	11 MAY 2005
49	Dexter	Renee	11	11.3	11 DEC 2002
63	Etheridge	Chloe	10	10.2	7 AUG 2003
68	Fitton	Rhys	10	10.3	5 JUL 2003
73	Fullgrabe	Kirsten	10	10.1	14 APR 2004
74	Fulter	Michael	11	11.3	11 DEC 2002

Total records found

Back Select Close

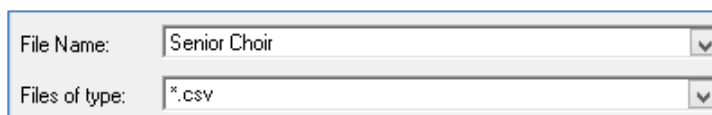
- Click Send Letter 
- Select the following options



The 'Mailing Options' dialog box shows '34 records in the browse set'. Under the first section, 'Create letters for all students in the browse set' is selected. Under the 'Merging system' section, 'Produce a CSV file for use in a subsequent mail-merge' is selected. The checkbox 'Send to all Contacts marked as Family Mail Marker' is checked. 'OK' and 'Cancel' buttons are at the bottom.

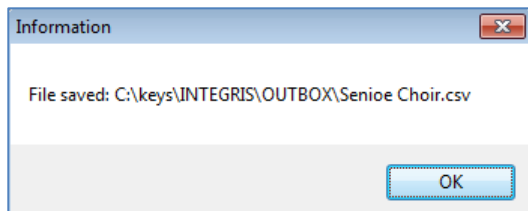
- Click **OK**
- Name the export file **Senior Choir**

**Note: The file defaults to save in the Integrus Outbox, however you can save the file wherever you wish. For training purposes you may use the Desktop.**



A dialog box with two fields: 'File Name:' containing 'Senior Choir' and 'Files of type:' containing '\*.csv'. Both fields have dropdown arrows on the right.

- Click **Save**



An 'Information' dialog box with a close button (X) in the top right. The text inside says 'File saved: C:\keys\INTEGRIS\OUTBOX\Senioe Choir.csv'. An 'OK' button is at the bottom right.

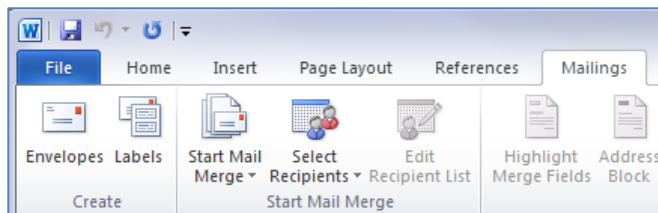
- Click **OK**

### 7.3.2 Creating a Mail Merge Letter in Word

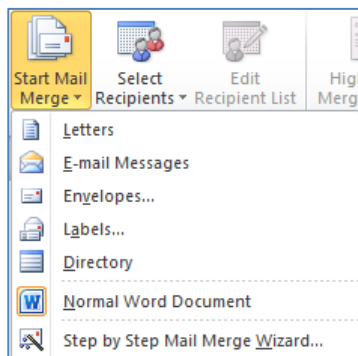
#### Activity

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

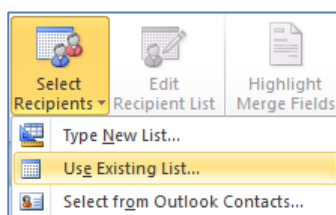
- Open a new Microsoft Word document and type the letter
- Click on the **Mailings** Menu



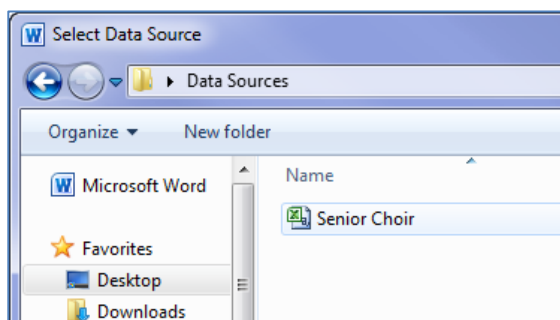
- Click on the small arrow at the bottom of the **Start Mail Merge** icon



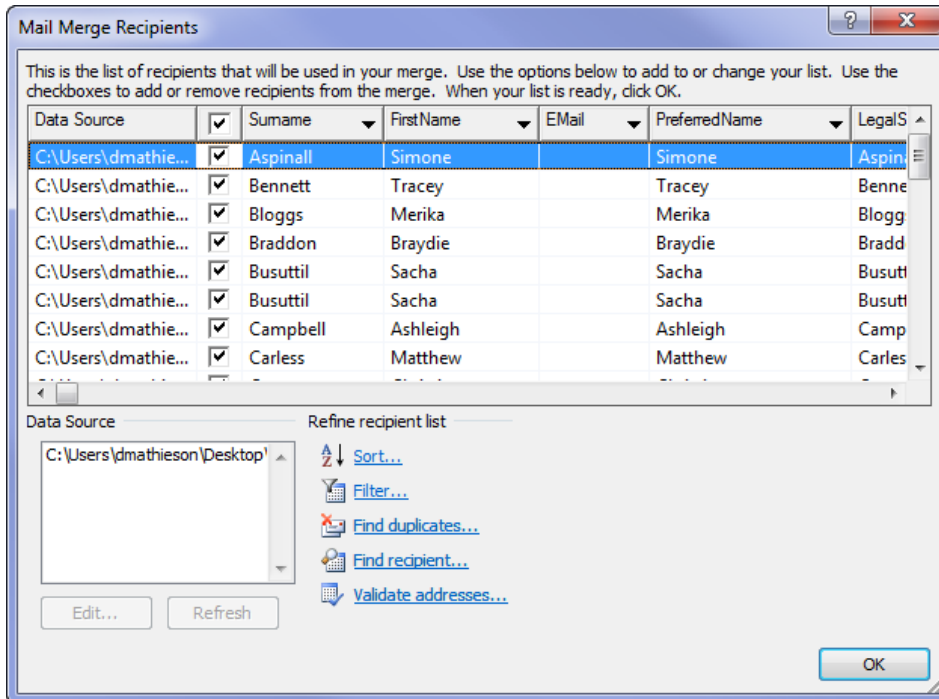
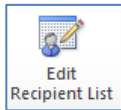
- Select **Letters**
- Click on Select Recipients and choose **Use Existing List**



- Browse to the csv file on your desktop



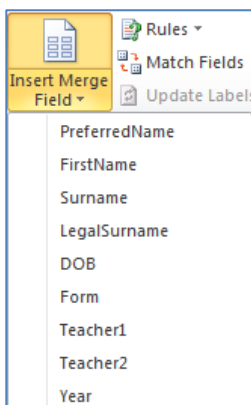
- Highlight and Click **Open or Double Click**
- Click the Edit Recipient List icon



- Click **OK** for all recipients or select those required

You are now ready to start creating your letter

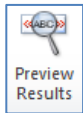
- Place your cursor where you want the first address line in your document to appear
- Click on the small arrow at the bottom of the **Insert Merge Field** icon



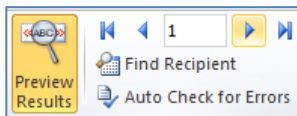
All available Mail Merge fields will show in this list.

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

Use the Sample on Page 22 of your Supplement to insert the remaining merge fields.  
Click **Preview Results** when you have completed your letter



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

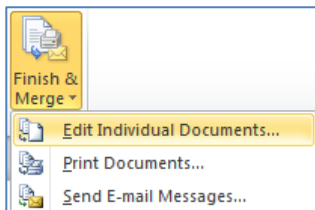


If there are mistakes in your letter:

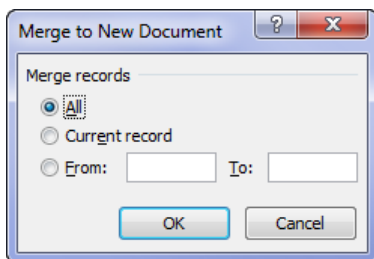
- Click **Preview Results** again and make any changes required

When you are happy with your letter:

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



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

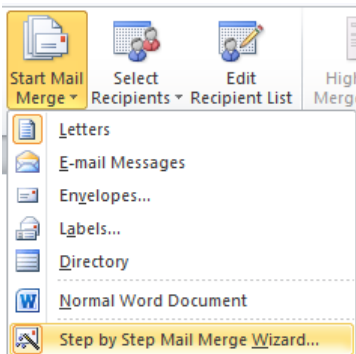


- View your merged letters
- Close the letters but do not close word

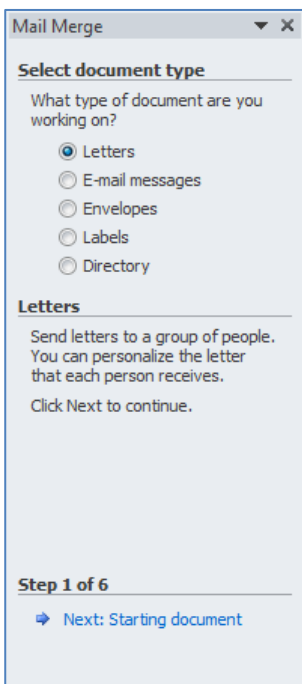
### 7.3.3 Using the Mail Merge Wizard

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

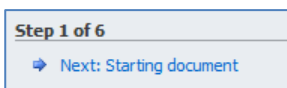
- Select **Step by Step Mail Merge Wizard** from the **Start Mail Merge** Icon



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

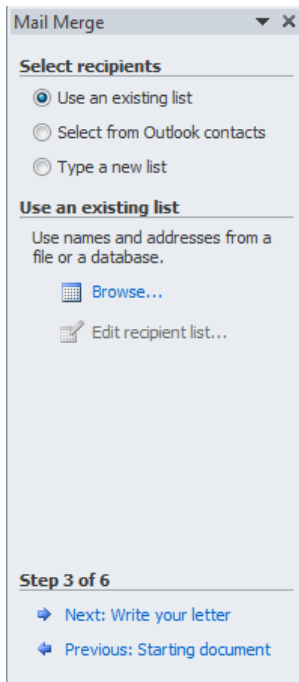


- Select the document you require and Click on **Next: Starting document**

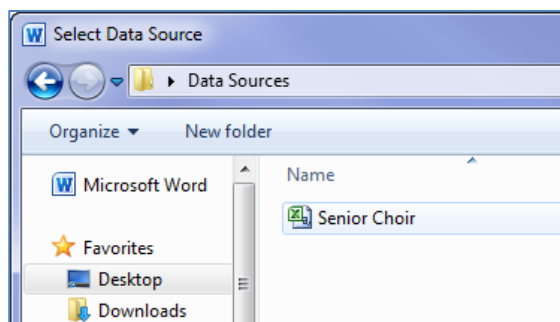


- Click **Next: Select Recipients**

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

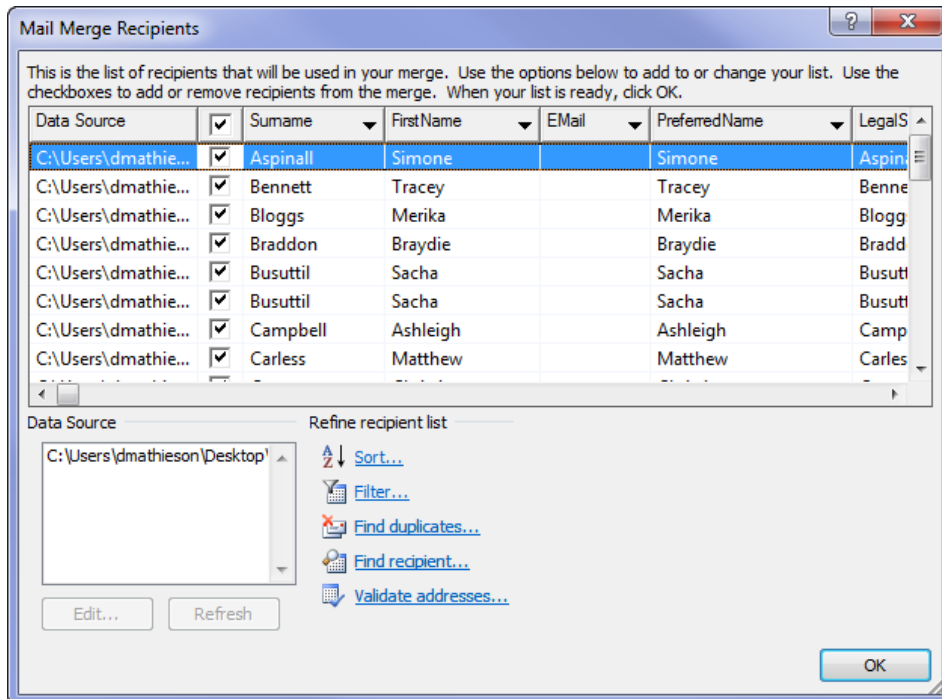


- Navigate to where you have saved your data source and Open the file

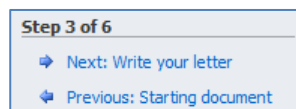




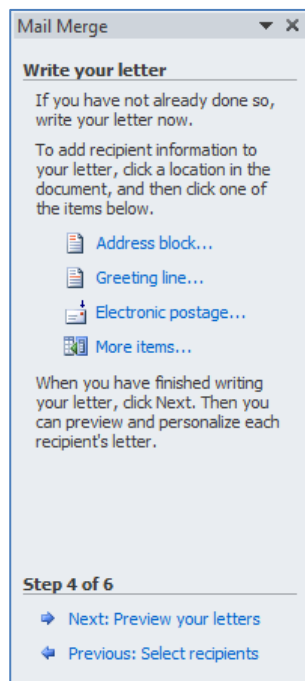
- View your Recipient List and select the recipients required and click OK



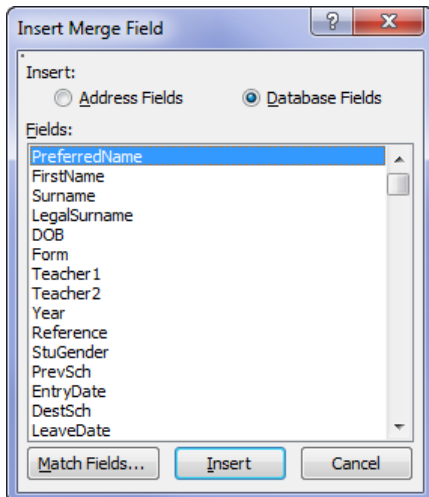
- Click Next: Write your letter



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



The available fields will display

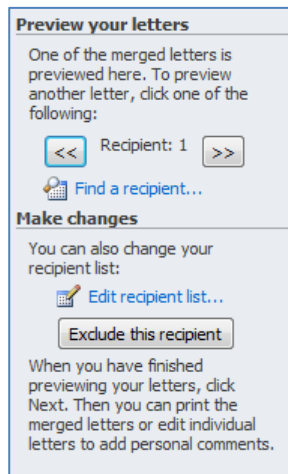


**Note: Fields can be inserted by double clicking or highlighting and clicking Insert. If you need to re-position your cursor in the document, you must close this window, move your cursor and click on More Items again.**

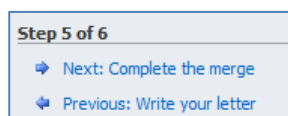
Once you have inserted all your items and typed your document:

- Click on **Next: Preview your Letters**

You can scroll through and view all recipients' letters or edit the recipient list at this point.



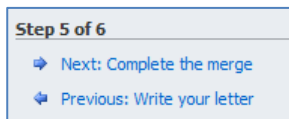
- If you find errors, click **Previous: Write your letter**



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

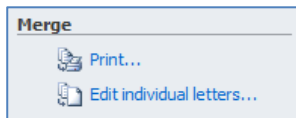
If you are ready to finish the Mail Merge:

- Click Next: Complete the merge

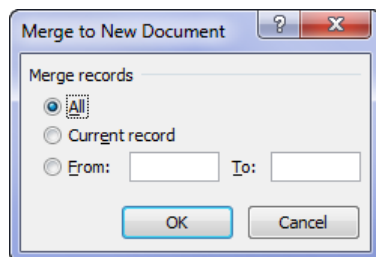


Letters can be printed at this point. If you wish to open the letters as a new document:

- Click on Edit individual letters



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



### 7.3.4 Create Student Activity Record for Letter Sent

Producing a Mail Merge data source for MS Word does not result in an activity record in Integris. We can use a short kst letter to create an Activity Log Record

#### Activity:

- In Word type a short letter similar to the one below
- Make sure you include **<FirstName>** and **<Surname>** as Mail Merge Fields using <>

Mail Merge Letter sent to <FirstName> <Surname> for the following activity/event

Activity: Choir Festival


Date Sent: Use *Insert Date and Time* from the MS Word Toolbar

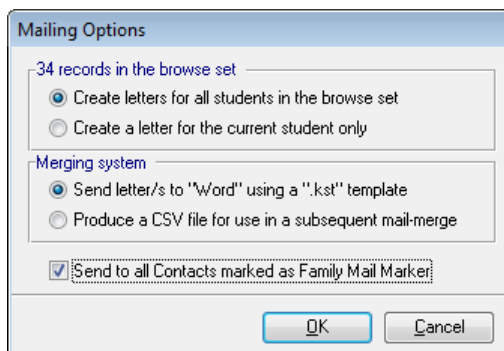
Letter Saved to: S: \Students\Letters\Music

- Save the letter on your **Desktop** as ***"Mail Merge letter Choir Festival.kst"***

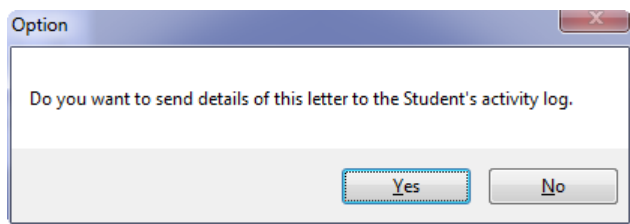
#### General > Student Details

The Senior Choir Browse Set should still be there.

- Click on Send Letter 
- Select the options below



- Click **OK** and navigate to where you saved the ***Mail Merge Choir Festival.kst*** letter



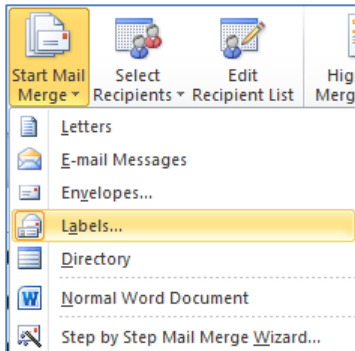
- Click **Yes**
- View the Students' Activity Logs

### 7.3.5 Create Address Labels

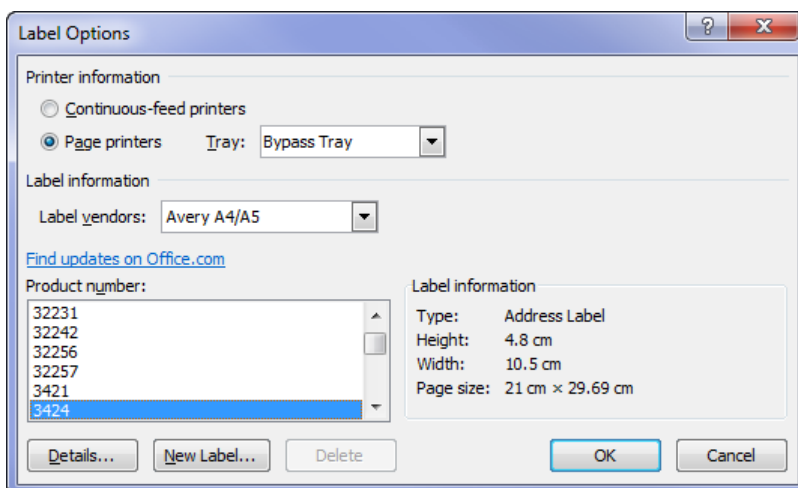
It is possible to create Address Labels for the students for whom you have created the mail merge documents or letters.

## Activity

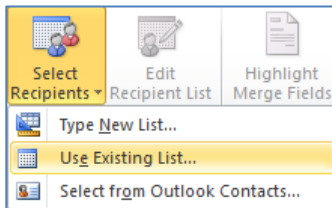
- Click on the Mailings Menu in Word
- Click on Start Mail Merge and select Labels



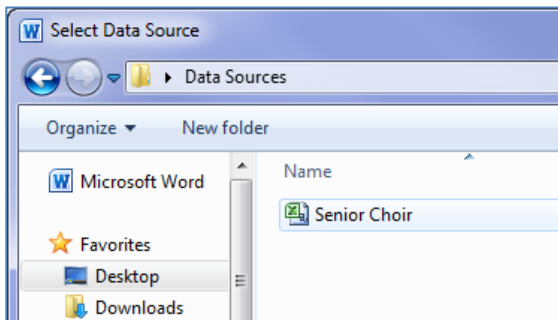
- Make the following selections and click **OK**



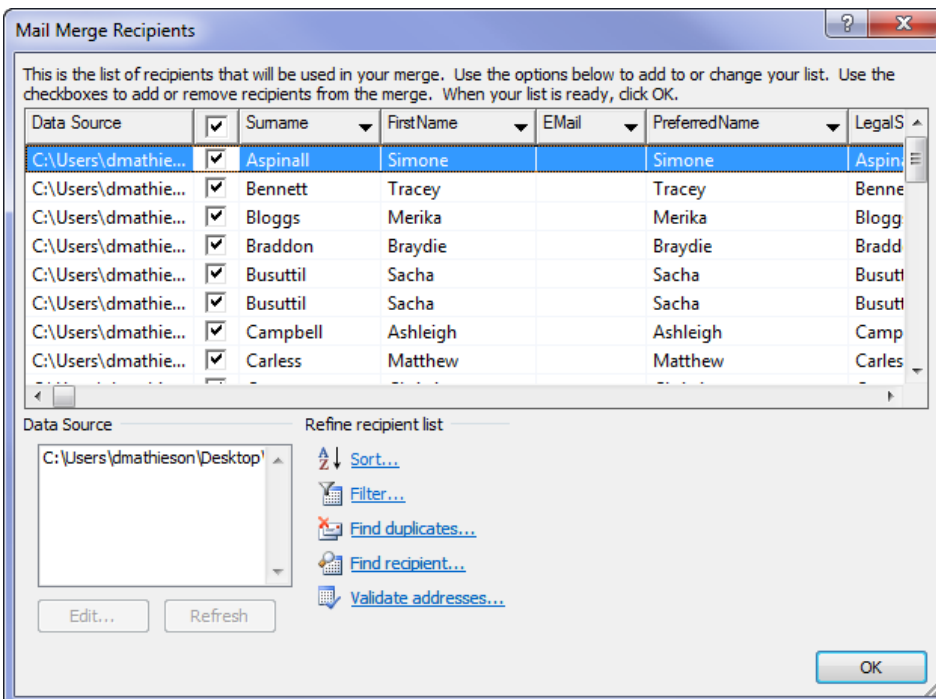
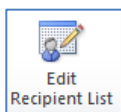
- Click on **Select Recipients** and **Use existing list**



- Browse to the csv file on your desktop



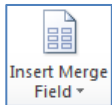
- Double Click** or Highlight the file and click **Open**
- Click the Edit Recipient List icon



- Click **OK** for all recipients or select those required

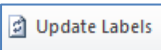
You are now ready to start creating your labels.

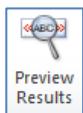
- Click **Insert Merge Field**



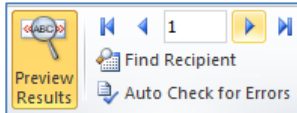
- Insert the mail merge fields shown below

«AddeeSalutation»  
«AddeeAddL1»  
«AddeeAddTown» «AddeeAddState» «AddeeAddPostCode»

- Click  Update Labels
- Click **Preview Results** when you have completed your labels



- Preview other labels by scrolling through the recipients with the scroll arrows

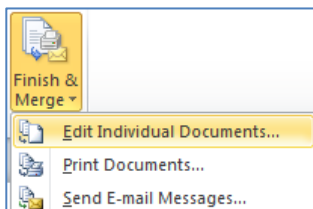


If there are mistakes in your labels:

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

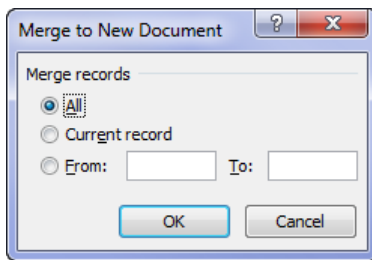
When you are happy with your labels:

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





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



- View your merged labels

<p>Ms Aspinall 3 Requa Crescent WEST PERTH WA 6008</p>	<p>Mr and Mrs Bennett 12 Minilya Loop SUBIACO WA 6009</p>
<p>Mr and Mrs Bloggs 7 Anzio Court LEEDERVILLE WA 6010</p>	<p>Mr and Mrs Braddon 72b Parkin Street WEST LEEDERVILLE WA 6011</p>

## 8 User Defined Information

User Defined Information (UDIs) is used for storing any information specific to schools that does not already have a field in Student Details. It could be anything from Indigenous Language Groups to Internet Permissions. Once UDIs have been created they can be used to report on and find students.

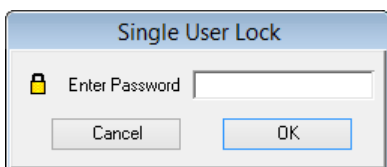
It is also possible to set up and maintain Staff and School UDIs.

### 8.1 Create a UDI

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

#### Activity

##### File > Single User Lock

A dialog box titled "Single User Lock" with a lock icon. It contains a text field labeled "Enter Password" and two buttons: "Cancel" and "OK".

- Enter your password

A dialog box titled "Locked Message" with a lock icon. It contains a text area for a message, a text field for the duration (set to 1.00 hrs), and two buttons: "View Users" and "OK".

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

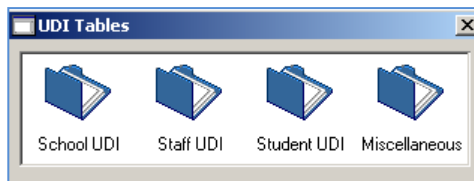
- Click **OK**

This icon appears under the Menu Bar:

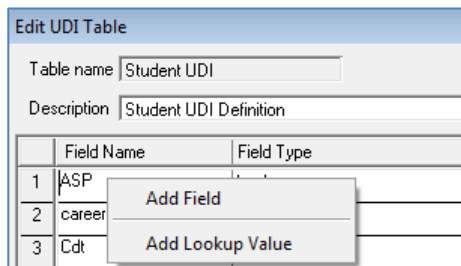


Create a field to record permission to use students' images in various media.

**General > Control > UDI Definitions**




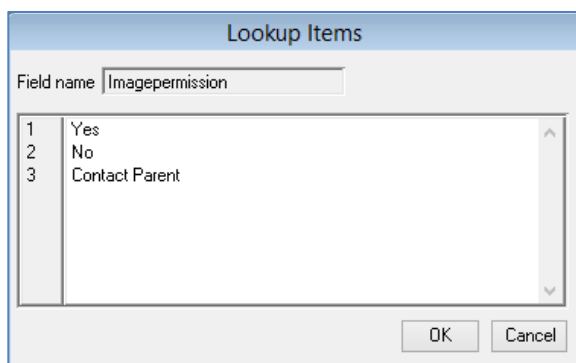
- Double click **Student UDI**
- Right click in the white pane under the **Field Name** heading



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

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

- **<Tab>**
- From the drop-down menu, select **Lookup**
- Click Edit 
- Type **Yes** and **<Tab>**
- Type **No** and **<Tab>**
- Type **Contact Parent** and click **OK**

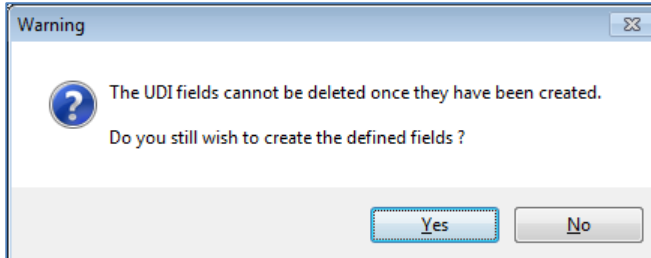


- Enter the **Description: Image Permission**

- Check ***Index***

26	Imagepermission	Lookup	N/A	Image Permission	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
----	-----------------	--------	-----	------------------	-------------------------------------	--------------------------	--------------------------	--------------------------

- Click ***OK***

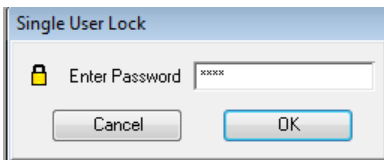


- Click ***Yes***

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

## Return to Multi-user mode

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



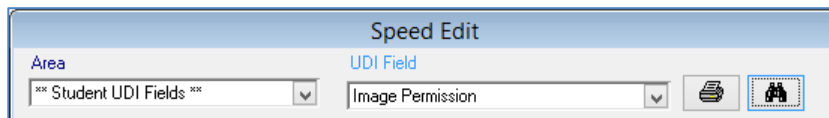
- Type your password
- Press ***<Enter>*** or click ***OK***


## 8.2 Speed Edit UDI

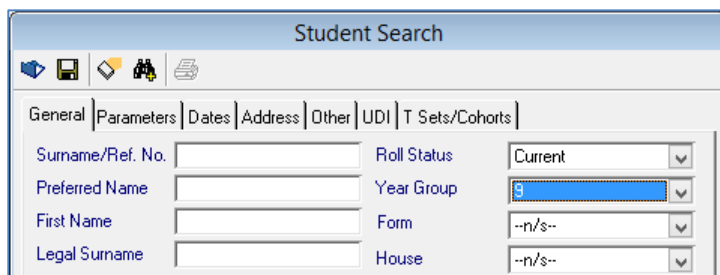
**Speed Edit the UDI Image Permission for all Year 9 students.**

**Admin > Speed Edit**


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



- Select Image Permission from the **UDI Field** menu
- Find  the **Year 9** students



- Click **Find**, **Select** and **Yes** to load all students into the Speed Edit window
- Highlight some of the students in the list
- Select **Yes** from the **New Value** menu

- Click Apply Changes 
- Enter **No** or **Contact Parent** or leave **Blank** for the remaining students
- Click **Save** and **Yes**

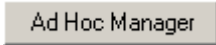
**General > Student Details**

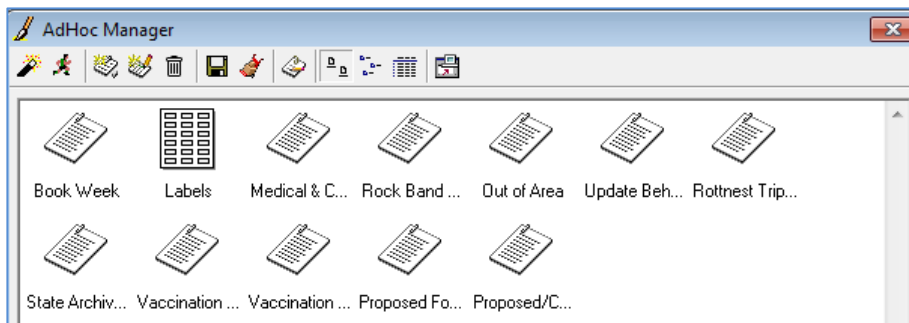
- View the UDIs  for the Year 9 students


## 8.3 Ad Hoc Reports

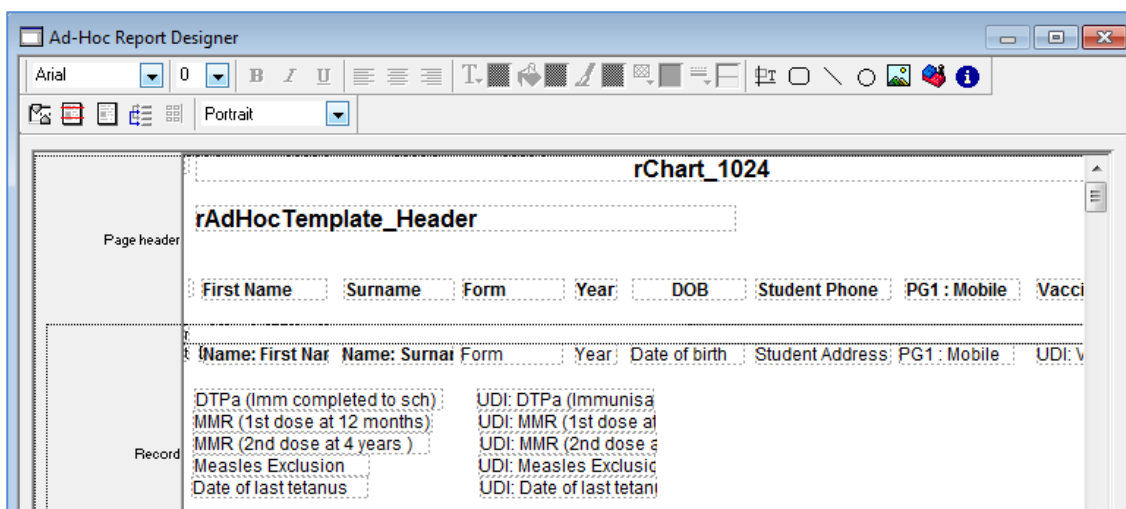
### Admin > Reports > Ad Hoc Reports > Ad Hoc Manager

Users can create their own reports using the Ad Hoc section under the main reporting menu.

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



To create a new report, click on the Ad Hoc Wizard icon.  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, added or deleted to change the whole layout of the report.

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

Use the  buttons to change the view of the ad hoc reports.

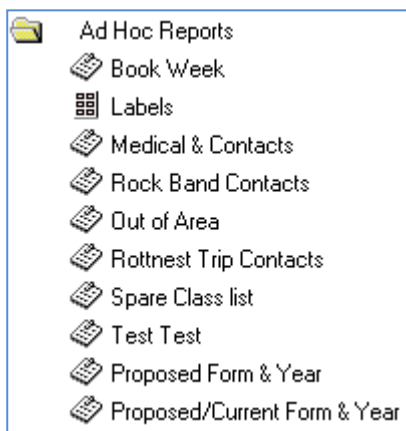
Reports can be:

- modified using Modify Report 
- copied using Copy Selected Report 
- renamed using Rename Selected Report 

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

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 and select students or load a saved query
- **Print** the report

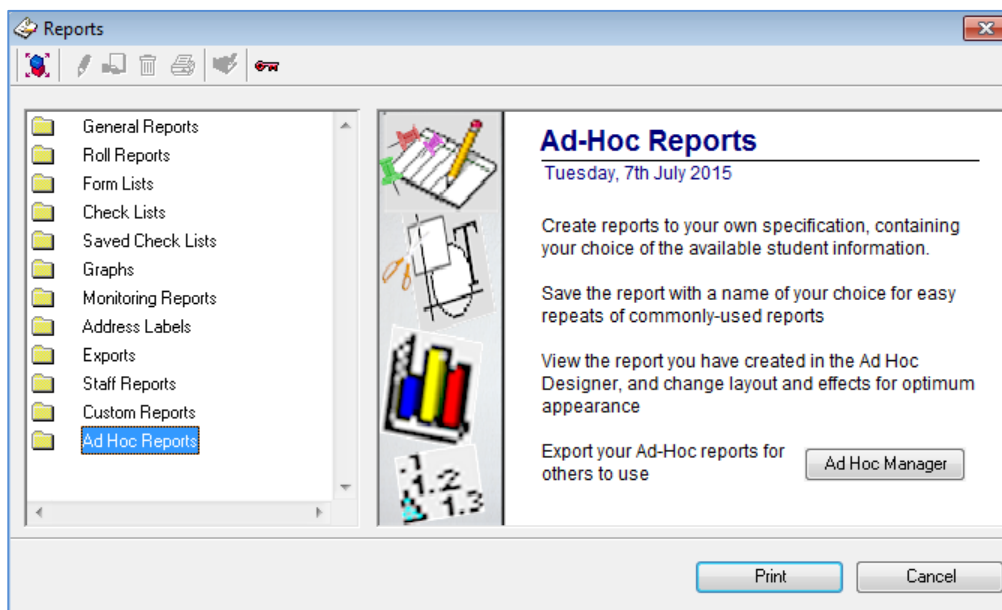
### 8.3.1 Simple Ad Hoc Reports


## Activity

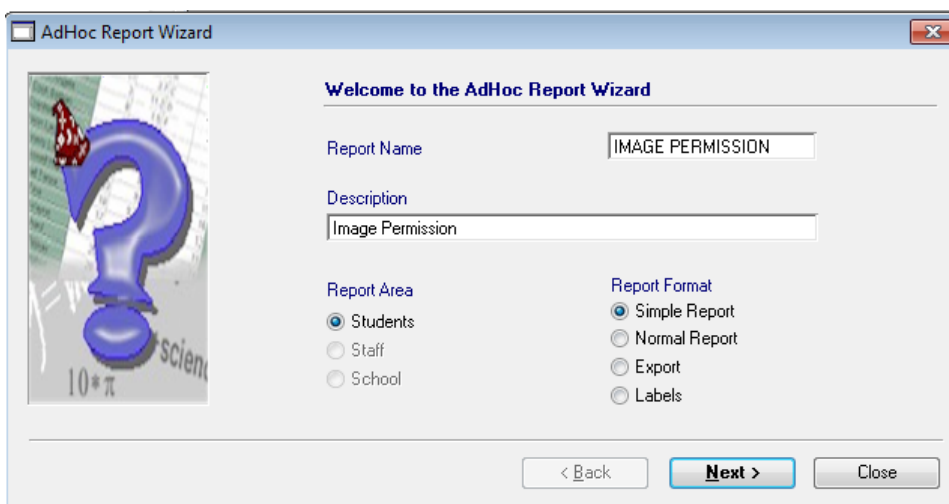
### Admin > Reports > Ad Hoc Reports

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

- Click **Ad Hoc Reports**



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




- Click **Next**



Check the following fields:

- Form
  - Name: First Name
  - Name: Surname
  - UDI: Image Permission
- Click **Next**
  - Leave the **Selection Criteria** as **ALL**
  - Click **Next**
  - Select the following **Print/Sort Options**:

Print / Sort Options

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

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

Print Order

Form


**Name: Surname**


Name: First Name

UDI: Image Permission

Either - use the buttons below to move the selected field to the required position

Or - drag and drop the fields into their correct positions in the list box to the left.

 Up

 Down

- Click **Next**
- Click **Create**
- Click the column header (in bold) **Form**
- Change the font size to **12**
- With **Form** still selected, click **Text Colour**
- Double click **Name: Surname** and change it to **Surname**
- Change the font size to **12** and select a suitable colour
- Continue to format the remaining column headers

rAdHocTemplate\_Header

**Form** **Surname** **First Name** **Image Permission**

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

The screenshot shows the 'Reports' window. On the left, a list of reports includes 'Book Week', 'Contact Information', 'Image Permission' (highlighted), 'Labels', 'Medical & Contacts', 'Out of Area', 'Proposed Form & Year', 'Proposed/Current Form & Year', 'Rock Band Contacts', 'Rottnest Trip Contacts', 'State Archives Report', 'Update Behaviour Incident Data', 'Vaccination Schedule DOB on c', and 'Vaccination Schedule DOB on c'. The right pane has a 'Titles' section with 'Main Title' set to 'Image Permission' and 'Page Footer' empty. Below this is a 'Select' dropdown menu and a 'New Query' button. At the bottom are 'Print' and 'Cancel' buttons.

- Click **New Query**
- Find the students in **Year 9**
- Print the report to the screen

**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.

### 8.3.2 Normal Ad Hoc Reports

These reports are used when the following fields are required in a report:

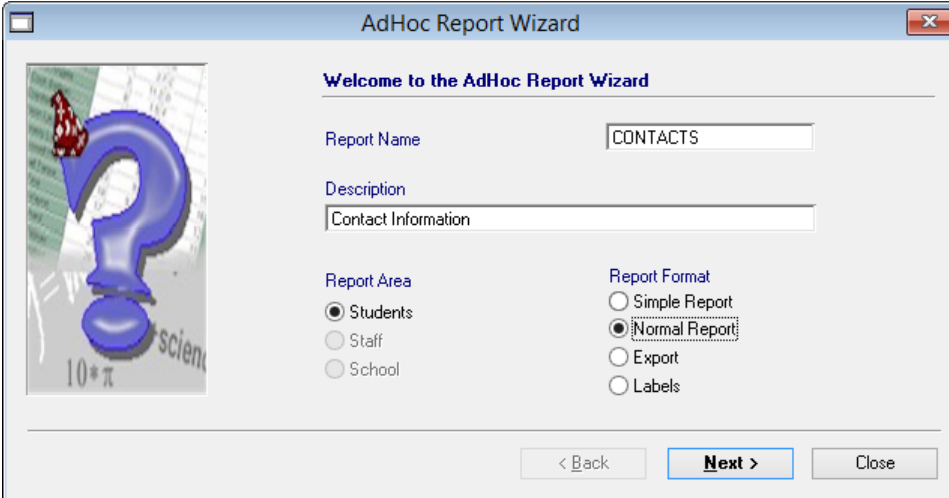
<input type="checkbox"/>	Activities
<input type="checkbox"/>	Medical Details
<input type="checkbox"/>	Contacts
<input type="checkbox"/>	Groups
<input type="checkbox"/>	Movement History

## Activity

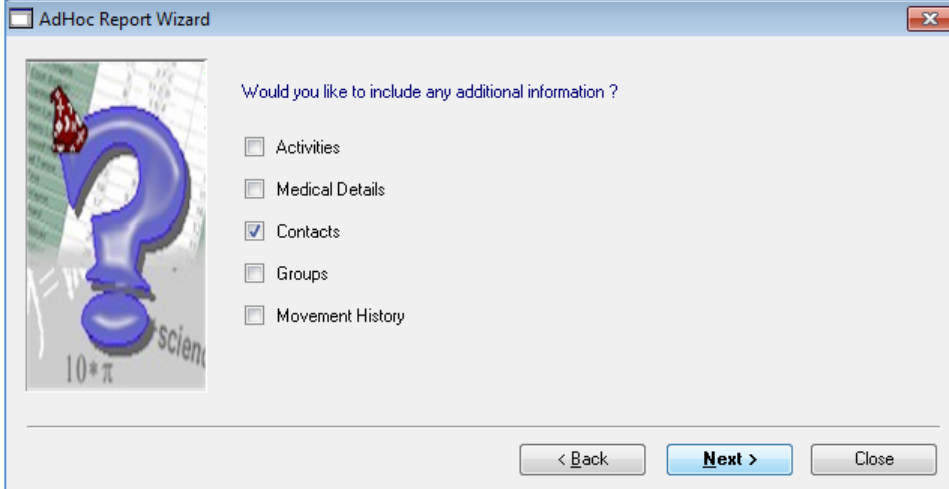
### Admin > Reports > Ad Hoc Reports > Ad Hoc Manager

Create a Normal report for Contacts information, including the students' First Names, Surnames and Forms.

- Select **Ad Hoc Reports**
- Click **Ad Hoc Manager**
- Click Create a new report 
- Enter a **Report Name** and **Description**



- Select **Normal Report**
- Click **Next**
- Select **Contacts**



- Click **Next**

Select the fields:

- Form
  - Name: First Name
  - Name: Surname
- Click **Next**
  - Leave the Selection Criteria at **All** and click **Next**
  - Make the following selections

Field	Print	Sort	Total	Page
Form	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Name: First Name	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	<input type="checkbox"/>
Name: Surname	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>

- Click **Next**
  - Select the following Print Order: **Form, Surname, First Name**
  - Click **Next**
  - Click **Create**
- In the Ad Hoc Report Designer window, format the report as you wish
  - Close the Ad Hoc Report Designer window and the Ad Hoc Manager window
  - Print the report for students in **Year Group 8**

## 9 Admin Reports

There are many reports available in Integris. We will view a few that may be particularly useful.

### 9.1 General Reports

#### 9.1.1 Medical Conditions

#### Activity

Admin > Reports > General Reports > Medical Conditions

- Sort by **Form**
- Check **Include Daily Management Plan**
- Select all students on the Current Roll

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

- Titles:** Main Title: Medical Conditions; Page Footer: (empty)
- Sort:** A list on the left contains 'DOB', 'Gender', and 'Year'. A table on the right has columns 'Sort Field', 'Total', and 'Page'. The first row shows '1' in the 'Sort Field' column.
- Select:** A dropdown menu shows 'Selected Subset 510 ...'. A 'New Query' button is next to it. The checkbox 'Include Daily Management Plan' is checked.
- Buttons:** 'Print' and 'Cancel' buttons are at the bottom right.

- **Print** the report to the screen

## 9.2 Roll Reports

### 9.2.1 Parent/Guardian 1 Phone and Address

**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

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

- Titles:**
  - Main Title: Parent/Guardian 1 Phone and Address
  - Page Footer: (empty)
- Sort Fields:**

	Sort Field	Total	Page
1	Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- Select:** (empty dropdown)
- Options:**
  - ☒ Include Student Number
  - ☐ Include Year Group
  - ☐ Include Form

Buttons: Print, Cancel

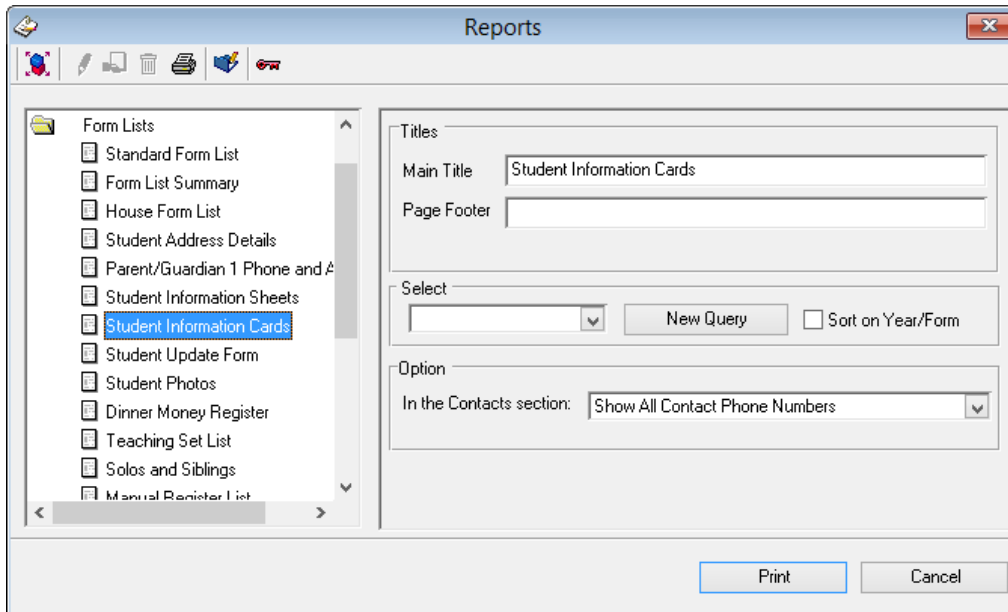
- Click **Print**

## 9.3 Form Lists

### 9.3.1 Student Information Card

#### Admin > Reports > Form Lists > Student Information Card

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



The screenshot shows a software window titled "Reports". On the left is a tree view under "Form Lists" containing items like "Standard Form List", "Form List Summary", "House Form List", "Student Address Details", "Parent/Guardian 1 Phone and Address", "Student Information Sheets", "Student Information Cards" (highlighted with a blue selection box), "Student Update Form", "Student Photos", "Dinner Money Register", "Teaching Set List", "Solos and Siblings", and "Manual Register List". On the right, the "Titles" section has a "Main Title" field with "Student Information Cards" and an empty "Page Footer" field. Below this is a "Select" section with a dropdown menu, a "New Query" button, and a "Sort on Year/Form" checkbox. The "Option" section has a label "In the Contacts section:" followed by a dropdown menu showing "Show All Contact Phone Numbers". At the bottom right are "Print" and "Cancel" buttons.

- Click **Print**

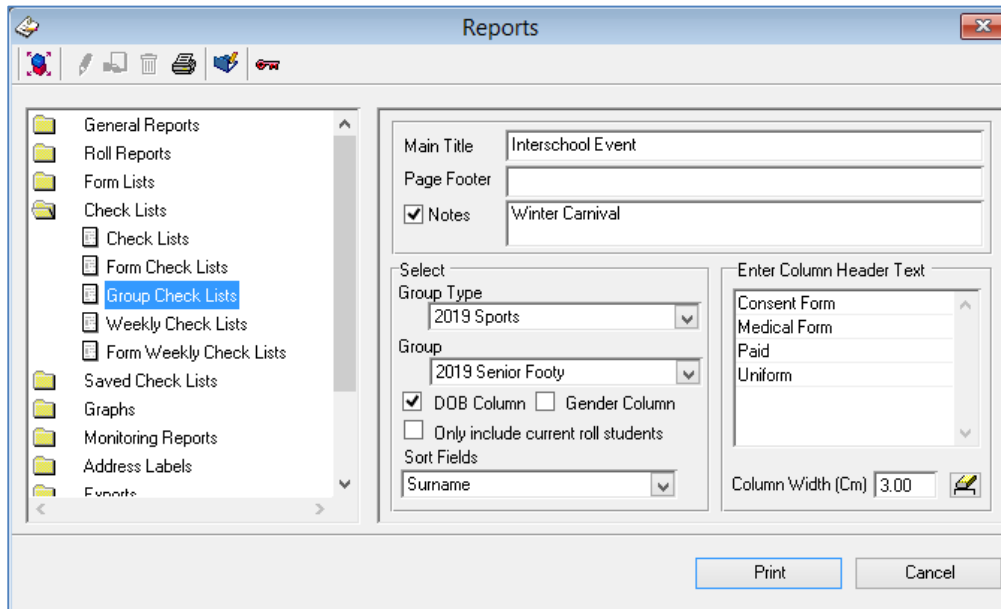
## 9.4 Check Lists


### 9.4.1 Group Checklist

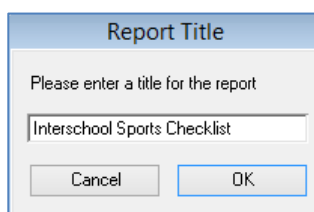
#### Activity

##### Admin > Reports > Checklists > Group Checklist

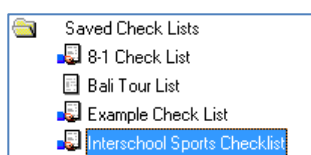
- Enter the following information



- Print** the report to the screen
- Close the report, but not the report definition
- Click Save as Custom Report 
- Rename the saved Checklist to **Interschool Sports Checklist**



- Click **OK**
- Click Allow Custom Report to be used by others 



- Close the Checklists and Saved Checklists folders



## 9.5 Address Labels

### 9.5.1 Family Mail

#### Activity

**Admin > Reports > Address Labels > Family Mail**

- Select **Standard Labels 8x3**
- Use **New Query** drop down list to select the saved query **Family Rep's**

The screenshot shows the 'Reports' application window. On the left is a tree view with folders for 'Form Lists', 'Check Lists', 'Saved Check Lists', 'Graphs', 'Monitoring Reports', and 'Address Labels'. Under 'Address Labels', there are several report types: 'Student Resident', 'Emergency', 'Family Mail' (which is highlighted), 'Parental Responsibility', 'All Contacts', 'Fees Billing', 'Student Address', and 'Student Details'. The main area is titled 'Stationery Setup' and contains a diagram of a label with dimensions: 'Top Margin' 1.37, 'Left Margin' 0.63, 'Label Width' 6.67, and 'Label Height' 3.39. To the right of the diagram, it says 'Measurements are in cms' and 'Standard Labels' with a dropdown menu showing '8 X 3'. Below the diagram, there is a 'Labels Across' field set to '3'. At the bottom, there is a 'Select' section with a 'Query' dropdown set to 'Family Reps', a 'New Query' button, and a 'Salutation' dropdown set to 'Title, Initials and Surname'. There are also three checkboxes: 'Include Name' (checked), 'Include Year' (checked), and 'Include Form' (checked). At the very bottom are 'Print' and 'Cancel' buttons.

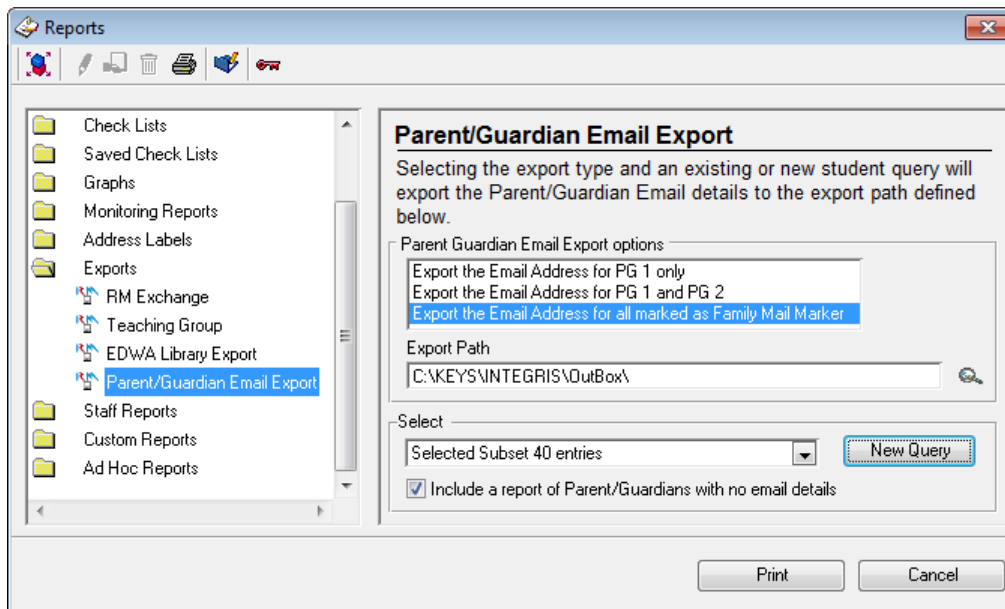
- **Print** to the screen

## 9.6 Exports

### Activity

#### 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 7**



- 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)**

# 10 Timetable Reports

## 10.1 O&M Reports-Teaching Sets

### 10.1.1 User Defined Teaching Set Lists

#### Activity:

Timetabling > Reports > O&M Reports –Teaching Sets > User Defined Teaching Set Lists

- Select the radio button **Teacher**
- Select **Harris Barclay**

The screenshot shows the 'Reports' window. On the left, a tree view lists various report categories, with 'User Defined Teaching Set Lists' selected. The main area has three tabs: 'Select', 'Sort', and 'Includes'. The 'Timetable' section contains several dropdown menus: 'TT Year' (2019), 'Cycle' (2019-05), 'Date Range' (28 JAN 2019 - 12 APR 2019), 'Day' (All), and 'Period' (All). Below these, the 'Teacher' radio button is selected, and a list of teachers is displayed, with 'HARRIS Barclay, Harris' highlighted. At the bottom, there are checkboxes for 'Use Preferred Name' and 'Show Teaching Sets lists and Period information for all Periods selected.' The 'Print' and 'Cancel' buttons are at the bottom right.

- Click the **Sort** tab
- Sort by **Subject**

The screenshot shows the 'Sort' tab. The 'Information' section contains text: 'The default sort is by Teaching Set, Day and Period, Surname, then First Name. Selecting Sort by "Day and Period" will result in a sort first by Day and Period, then by Teaching Set. Teaching Set sorts will precede Student Sorts.' The 'Sorts' section has a table with the following data:

	Sort Field	
Day and Period		
Teacher		
Department		
Gender	1 Subject	
DOB		
Form		
Year		

- Select the **Includes** tab
- Check **Student Form, Parent/Guardian Name, and Parent/Guardian Phone**
- Enter **6** in **Number of Columns**

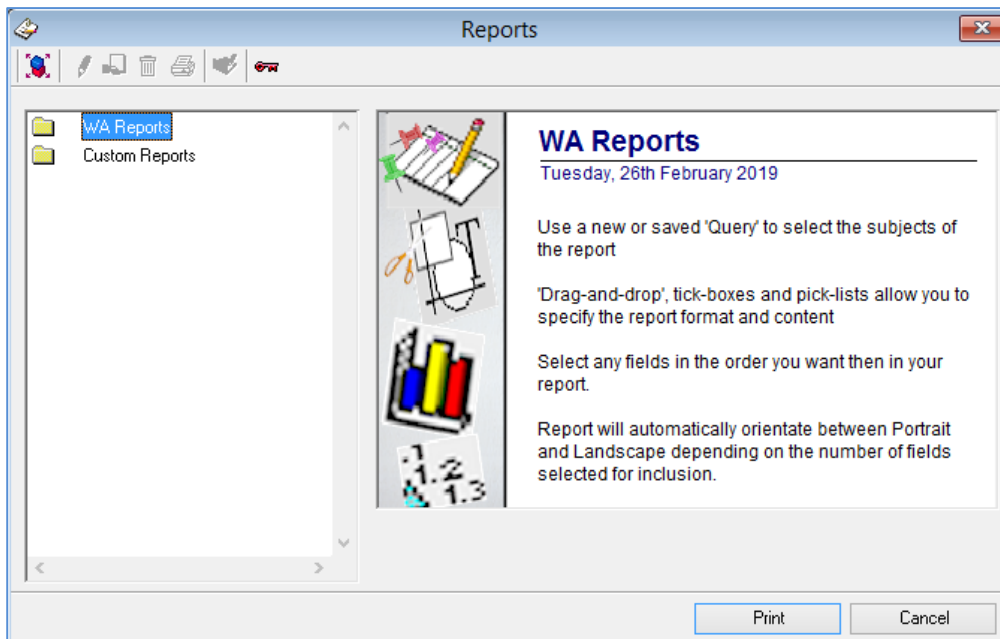
The screenshot shows the 'Reports' window with the following details:


- Titles:**
  - Title: User Defined Teaching Set Lists
  - Footer: (empty)
- Select | Sort | Includes:**
  - Order:**
    - ☐ Student Reference Number
    - ☐ Student Year Group
    - ☒ Student Form
    - ☐ Student Gender
    - ☐ Student DOB
    - ☐ Student Address
    - ☐ Student Telephone
    - ☐ Student Mobile
    - ☒ Parent/Guardian Name
    - ☐ Parent/Guardian Address
    - ☒ Parent/Guardian Phone
    - ☐ Parent/Guardian Mobile
    - ☐ Parent/Guardian E-mail
- Check List Columns:**
  - Select the number of columns you would like to appear in the check list. The width of these columns will be calculated by dividing the available space remaining by the number of columns selected. You can select up to 50 columns
  - Number of Columns: 6
  - Check Column width (cm): 1.12
  - Orientation: Portrait
  - Available space (in cm) remaining: 6.705

- **Print** the report to the screen
- **View** then close the report
- Run the report again, however select **Department** or **Subject/Teach Set** from the **Select** tab and choose from the Department list or the Subject/Teaching Set list.

# 11 WA Reports

WA Reports > Reports > WA 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.

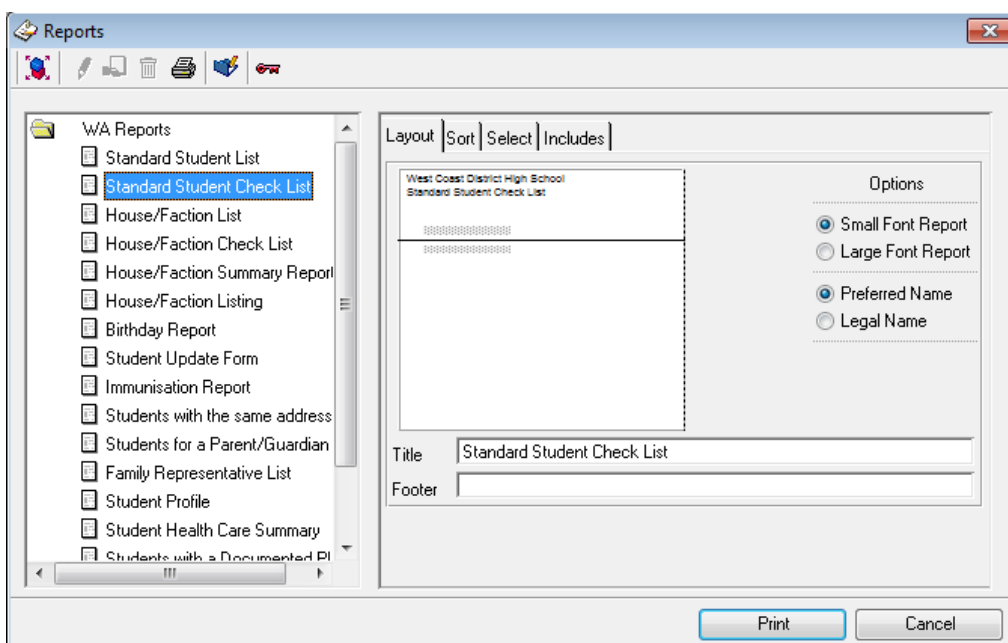
### 11.1.1 Standard Student Checklist

It is possible to create checklists in WA Reports for Forms, Year Levels, Groups or Teaching Sets. A check list can be created to cover multiple groups of students, which is done through the Advanced Search function. This allows the user to customise the report to suit their purpose.

#### Activity:

#### WA Reports > Reports > WA Reports > Standard Student Checklist (Using the Advanced Search function)

- Select the Standard Student Check List



- On the **Layout Tab** enter a suitable name for the report

The screenshot shows the 'Layout' tab of a report configuration window. The window has tabs for 'Layout', 'Sort', 'Select', and 'Includes'. The 'Layout' tab is active, showing a preview of the report header with the text 'West Coast District High School Choir Festival'. Below the preview, there are fields for 'Title' (containing 'Choir Festival') and 'Footer'. To the right, under the 'Options' section, there are four radio button options: 'Small Font Report' (selected), 'Large Font Report', 'Preferred Name', and 'Legal Name'.

- On the **Sort Tab** double click **Year** and check **Total** and **Page**
- Double click on **Sex** and **Surname**

The screenshot shows the 'Sort' tab of the report configuration window. The window has tabs for 'Layout', 'Sort', 'Select', and 'Includes'. The 'Sort' tab is active, showing a list of fields on the left and a table of sort fields on the right. The fields on the left are 'First Name', 'DOB', 'House', and 'Form'. The table on the right has columns for 'Sort Field', 'Total', and 'Page'. The 'Sort Field' column contains 'Year', 'Sex', and 'Surname'. The 'Total' and 'Page' columns have checkboxes. The 'Year' row has both checkboxes checked. The 'Sex' and 'Surname' rows have both checkboxes unchecked.

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

- On the **Select** tab, click the **Student Find** radio button

☐ Subject/Teach Set  
☒ Student Find

- Click on **New Query**
- Find the **Group Type 2019 Music** and **Group 2019 Senior Choir**

Student Search

General Parameters Dates Address Other UDI T Sets/Cohorts

Surname/Ref. No.  Roll Status

Preferred Name  Year Group

First Name  Form

Legal Surname  House

Group Type

Group

- Click **Find**
- On the Search Results Screen click on Advanced Find 

This saves the first search and allows you to add another.

- Click Add 
- Find the **Group 2019 Junior Choir**

Student Search

General Parameters Dates Address Other UDI T Sets/Cohorts

Surname/Ref. No.  Roll Status

Preferred Name  Year Group

First Name  Form

Legal Surname  House

Group Type

Group

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

The Junior Choir Students have been added to the group. The Advanced Find can be used again to select more students if required.



**Student Search Results**

Reference	Surname	Preferred Name	Year	Form	Date of Birth
875	Arrowsmith	David	7	07.1	8 OCT 2006
774	Brown	Lana	7	07.1	7 MAR 2007
825	Content	Damien	5	Room 5	19 DEC 2008
821	Davids	Chelsea	7	07.1	20 JUN 2007
828	Delamare	Graeme	5	Room 5	7 AUG 2008
830	Desilva	Haley	5	Room 5	19 DEC 2008
831	Dudney	Jenna	7	07.1	20 JUN 2007
836	Edwardo	Jacob	5	Room 5	19 DEC 2008
835	Edwards	Justin	5	Room 5	24 MAR 2009
837	Ellard	Kate	6	Room 6	8 MAY 2008
839	Elliott	Katherine	5	Room 5	7 AUG 2008
841	Etheridge	Kirsty	7	07.1	8 OCT 2006
843	Farmer	Kristy	5	Room 5	19 DEC 2008
852	Farnton	Steven	5	Room 5	7 AUG 2008
805	Goddard	Tim	7	07.1	7 MAR 2007
858	Gray	Thi reth	4	Room 4	3 OCT 2009

Total records found **27**

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

The Senior and Junior choir are now added to the group

**Advanced Student Find**

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

Ref.	Surname	Preferred Name	Year	Form	Date of Birth
875	Arrowsmith	David	7	07.1	8 OCT 2006
7	Aspinall	Simone	9	09.2	15 MAR 2005
12	Bennett	Tracey	9	09.3	11 MAY 2005
17	Bloggs	Merika	9	09.1	15 MAR 2005
22	Braddon	Braydie	9	09.2	15 MAR 2005
774	Brown	Lana	7	07.1	7 MAR 2007
27	Busuttil	Sacha	9	09.3	6 JAN 2005
29	Campbell	Ashleigh	11	11.2	3 APR 2003
31	Carless	Matthew	8	08.3	13 DEC 2005
32	Carter	Christine	9	09.1	15 MAR 2005
37	Clark	Gemma	9	09.2	21 NOV 2004
825	Content	Damien	5	Room 5	19 DEC 2008
42	Cunliffe	Aaron	9	09.3	27 OCT 2004
821	Davids	Chelsea	7	07.1	20 JUN 2007
828	Delamare	Graeme	5	Room 5	7 AUG 2008
47	Dent	Kaitlyn	9	09.1	11 MAY 2005


Total students selected **61**

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

- On the **Includes** tab, check **Student Sex** and **Student Form**
- Enter the **Column Labels** and **Widths** as shown

Column Label	Width
<input checked="" type="checkbox"/> Consent	2.000
<input checked="" type="checkbox"/> Medical	2.000
<input checked="" type="checkbox"/> Paid	2.000
<input checked="" type="checkbox"/> Bus Transport	3.000
<input checked="" type="checkbox"/> Parent Transport	3.000
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Available Space (in Cm) remaining: 5.965

- **Print** the report to the screen
- Click on Save as a Custom Report 
- Name the report **Choir Festival Checklist** and click **OK**

Report Title

Please enter a title for the report

Choir Festival Checklist

Cancel OK

The Report is saved in the Custom Report Folder.

Custom Reports

- class list
- Temp Home Room List
- Choir Festival Checklist

**Note: As Advanced Searches cannot be saved in this version of Integrus, only the set up in the other Tabs will be saved in this example**

## 11.1.2 Student Profile Report

### Activity:

#### WA Reports > Reports > WA Reports > Student Profile

- Click on Student Profile Report Icon



This provides a shortcut to the WA Reports Sidebar and defaults to the Student Profile Report

- Enter the From date as **01 Feb 2018** and the To date as **Today**
- Click **New Query**
- Choose **Form 8.1** and click **Find**
- Highlight the first four students in the list and click **Select** and **Yes**

- Select 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**

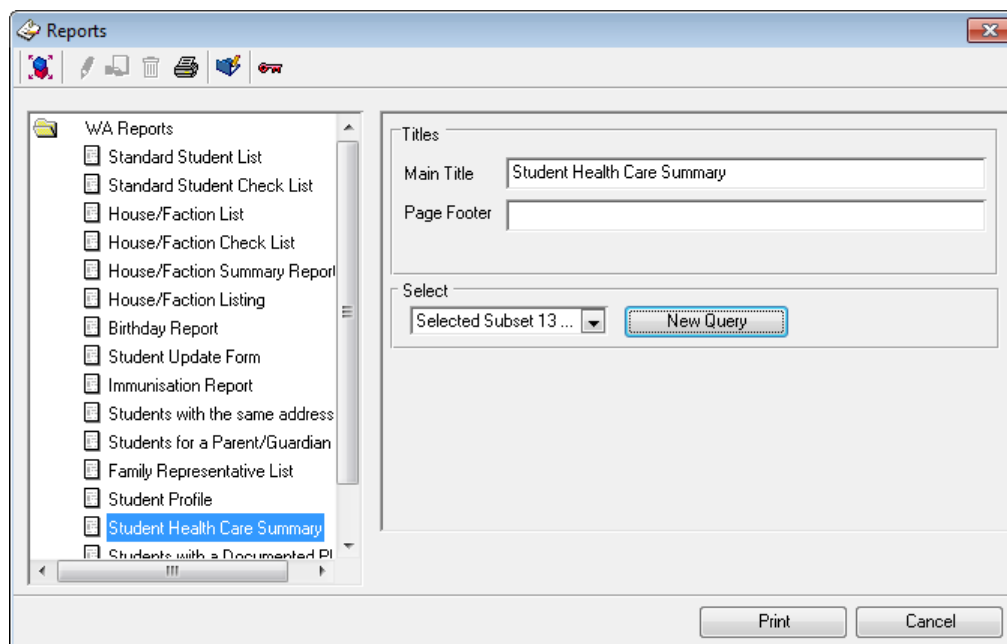
- Click **Print**
- View then close the report

### 11.1.3 Student Health Care Summary (Form 1)

## Activity

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

- Click on **New Query**
- Select all the students in **Year Group K**
- Type in a footer message



- Click **Print**

**Note: Printing this form through the WA Reports will not create a letter sent in the student's activity log record.**

# 12 Index

## A

Accessing Help .....	12
Activity Parameters .....	14
Ad Hoc Reports .....	116
Ad Hoc Reports > Ad Hoc Manager.....	119
Ad Hoc Reports.....	114
Address Labels.....	106
Admin Reports.....	121
Admin Reports-Address Labels.....	125
Admin Reports-Check Lists .....	124
Admin Reports-Form Lists .....	123
Admin Reports-General Reports.....	121
Admin Reports-Roll Reports .....	122
Admissions Roll.....	48
Admissions Transfer to Current Roll .....	52
Advanced Search .....	130

## C

<b>Change User</b> .....	11
Checklists.....	130
Create UDI .....	110
Creating a Mail Merge Template in Word .....	96

## E

Exporting and Importing Student Data.....	63
Exporting Student Information.....	65
Exports.....	126
External Roll.....	83, 84
External Roll Active.....	83

## F

Family Mail Marker.....	32, 33
Family Mail-Address Labels .....	125
Family Representative List.....	40
Family Representatives .....	36, 37
Find Student .....	24
Flagging Family Mail Markers.....	33
Flagging Family Representatives .....	37
Former Roll .....	54

## G

Group Checklist .....	124
-----------------------	-----

## H

Health Care Conditions Review Date.....	47
---	----

## I

Import.....	73
Importing Student Data .....	69

## K

<b>kst86</b> , 88, 90	
kst Template .....	88

## L

Linking Siblings .....	39
Lock Terminal.....	11
Logging On .....	10

## M

Mail Merge.....	86
Mail Merge using csv format .....	93
Mail Merge Wizard .....	99
Mail Merge: kst format .....	88
Make Siblings the Browse Set .....	24
Medical Conditions .....	121
Medical Details Report.....	45
Medical Record-Editing.....	42
Medical Reports .....	45
Medication Report .....	46

## O

Online Manuals and Training Notes.....	140
--	-----

## P

Parameters.....	14
Parameters-School Activity Types.....	16
Parameters-Student Activity Types.....	15
Parent/Guardian 1 Phone and Address .....	122
Parent/Guardian Email Export .....	126
<b>Password</b> .....	11

## Q

Quick Search .....	23
--------------------	----

## R

Re-Admissions Form .....	56
<b>Report Destination</b> .....	11

## S

Saved Checklists.....	124
School Activities-Editing.....	22
School Activity.....	20
School Activity Types .....	16
School to School Export .....	65
School to School Import.....	69, 73
Schools Curriculum and Standards Authority-Student Numbers.....	60
Simple Ad Hoc Reports.....	116

Simple Student Search .....	23
Speed Edit .....	113
Speed Edit UDI .....	113
Standard Student Checklist .....	130
Student Activities Report .....	19
Student Activity .....	17
Student Activity Types .....	15
Student Details .....	23
Student Health Care Summary .....	137
Student Information Card .....	123
Student Profile Report .....	135
Student Records-Editing .....	32
Students Details XML Export .....	66
Support .....	140
System Preferences .....	13

## **T**

The File Menu .....	11
Timetable Reports .....	127
Timetable Reports-Teaching Sets .....	127

Timetable Reports-User Defined Teaching Set Lists .....	127
Training Outcomes .....	9
Training Program .....	8
Transfer File .....	64

## **U**

Unlocking the terminal .....	11
User Defined Information .....	110

## **W**

WA Reports .....	129
WA Reports-Standard Student Checklist .....	130
WA Reports-Student Health Care Summary .....	137
WA Reports-Student Profile Report .....	135

## **X**

XML Export .....	66, 67
------------------	--------

## 13 Support

Should you require support please contact the **Customer Service Centre (CSC)** at the Department of Education.

Contact details below:

### 13.1 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.

### 13.2 Fax (CSC)

9264 4701

Please include your *ID number*, *contact details* and a *brief description* of the problem.

### 13.3 Email (CSC)

[customer.servicecentre@education.wa.edu.au](mailto:customer.servicecentre@education.wa.edu.au)

Please include your *ID number*, *contact details* and a *brief description* of the problem.

## 14 Online Manuals and Training Notes

### 14.1 Civica

Online manuals and training notes are available to download in PDF format from the Civica Education website.

[www.civicaeducation.com.au](http://www.civicaeducation.com.au)

Select online manual login.  
Username: school  
Password: help

### 14.2 STIMS Project

The Department's Student Information Management Project (STIMS) website has numerous fact sheets and support documents for all SIS Administration modules.

<http://www.det.wa.edu.au/intranet/stims>