Guide

Details

Win School®

Version 4.2

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Written by Tony Yip of Chancery Software Ltd.

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Introducing Details

Overview

In Details, you create and edit course, teacher, student, and resource information. All other modules draw this information from Details.

The data you enter in Details is used to track information about courses, teachers, students, and resources in other modules such as Report Cards and Scheduler.

General procedures for using Details are provided in “Using the Details Module” on page 3.

Procedures for entering and processing details on courses, teachers, students, and resources are in the following sections. You can also generate and print reports on any of the information.

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Using the Details Module

Setting Up Details

We strongly recommend you close other applications while using Win School.

Before using Details, use School Setup to set up structures for data entry in Details. Codes, lists, fields, flags, Custom tabs, and Multi-Data tabs information are created and modified in School Setup for use in Details.

If you find a popup menu in Details with no items listed, you have not created a list in School Setup. The same applies to unlabelled fields and flags. Close Details, open School Setup, and add information.

Using the Details Module

The Details module has 4 parts used to create, edit, and delete records:

- Course Details
- Teacher Details
- Student Details
- Resources Details

Details manages information for 2 purposes:

- record-keeping and calculation in Attendance, Report Cards, or Scheduler
- displaying in Query or reports

Running Details with Other Modules

Some restrictions apply to using Details when more than 1 module is running at the same time.

- With any other module, you cannot start Course Details or Teacher Details.
- With School Setup, you have view-only access to all dialogs except the Edit Points & Credits dialog for Report Cards.
- With Scheduler, you have view-only access to teachers and courses. Scheduler cannot be run if teachers or courses are open in Details.
- Changes you make in Details appear in other modules and for other users shortly after you save those changes.

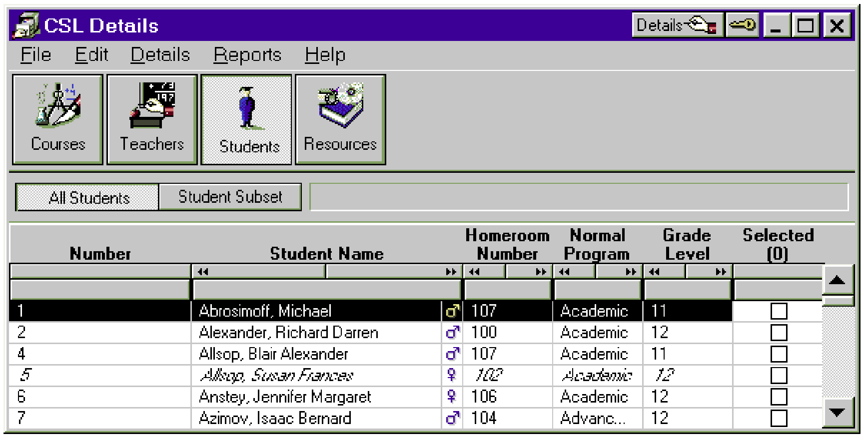
Running Details in Multi-User Mode

With Win School multi-user, many users can use Details at the same time, if they edit different records. The last person to save the data has their changes saved.

Only 1 user at a time can edit status codes, conduct codes and student comments. View-only access to this data is indicated by a padlock beside the field. When the user with edit access closes that dialog, the data updates, the lock disappears, and the computer beeps.

Using the Main Window

There are 4 view icons at the top of the Main window in Details: Courses, Teachers, Students, and Resources. These icons are dimmed and inactive if you do not have password access to that information.

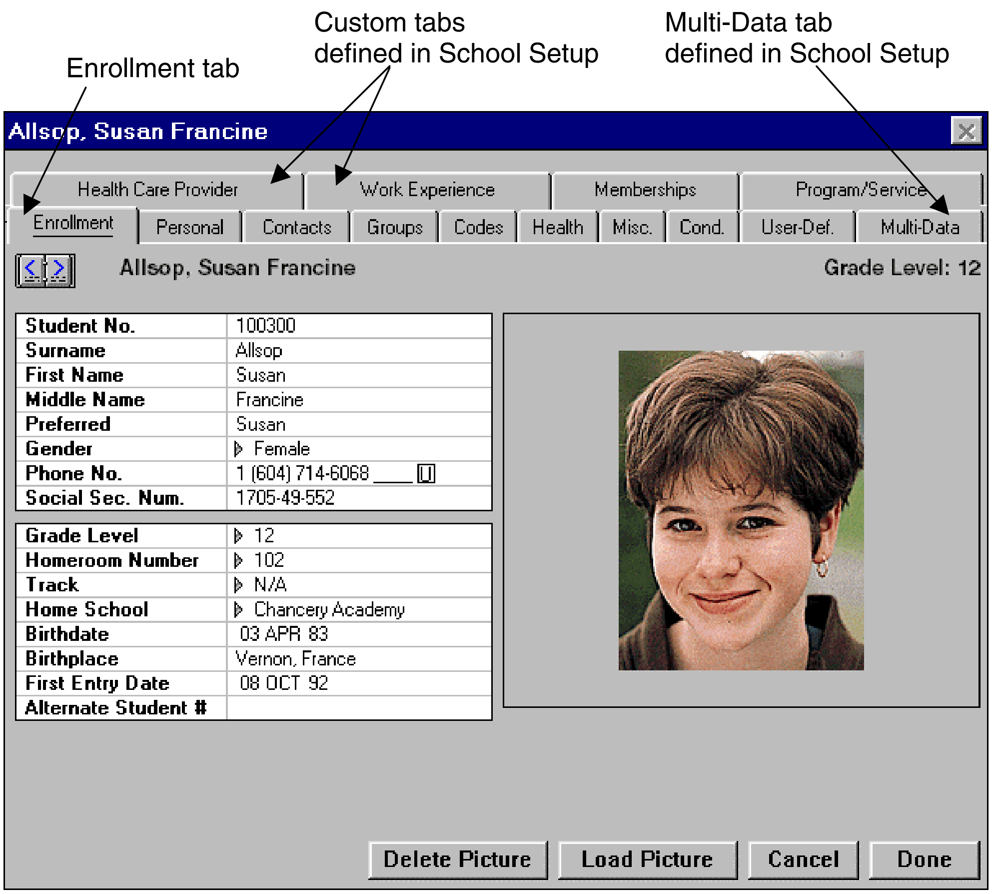


- To see a view, click the view icon or use the key combination Ctrl-F1 to Ctrl-F4 for Courses to Resources respectively.
- To create a record from the Main window, make sure you are in the right view, then choose New from the File menu.
- To open the record for an item in the Main window, double-click it.
- To change the information in a column with VCR buttons, click the chevron and select what you want to see.
- Inactive students are displayed in italics.

  You can hide inactive students by choosing Hide Inactive Students from the Edit menu.

Using Tabs

In Details, you enter or edit data in tabs.



- Open a tab by double-clicking a record name in the Main window.
- Switch to another tab for that item by clicking on a different tab. You can define custom tabs from the Tabs menu in School Setup.
- Use keyboard shortcuts to move quickly to other records or tabs:

Previous Record	F3	
Next Record	F4	
Previous Tab	Shift-F3	
Next Tab	Shift-F4	

- To create a record from the Main window, use the New command from the File menu.
- If a padlock appears to the left of the record name, you have view-only password access to that information. You can look at, but not edit, the record.

If a padlock appears next to a field, you are running the multi-user version of Win School, and another user is working on that record. When the other user finishes, the data updates, the lock disappears, and the computer beeps.

Using and Editing Popup Menus

A pencil or wedge icon indicates a popup menu. The pencil means you can edit and select from the field, the wedge means you can only select.

Homeroom Number	▶ 103
Home Languages	German
Ethnic Categories	Canadian
Birthdate	Nov 14, 1950
Date Hired	May 30, 1988
Administrator	▶ No

To select from a popup menu:

- Click and hold on the text to the right of the icon, then scroll.

  OR

- Click and type the first few letters of the entry you want.

To add an item to a popup menu:

1 If a pencil appears to the left of the popup, click the field and press Ctrl-E. Existing items can only be changed in School Setup.

2 If the dialog contains a Short Code column, type any code of up to 4 characters that does not already appear in the list.

3 Click Add.

Editing Dates

To edit a date:

- Click the field and type.

  Some date fields can be set to N/A. Select the month and type `N/` or press Backspace.

Editing Phone Numbers

All phone number elements are optional. The letters L or U indicate listed or unlisted numbers.

Working with Data and Records

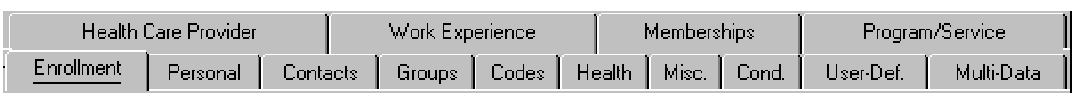
This section describes the basics of entering and maintaining information in Details. You can use time-saving techniques, such as using keyboard shortcuts to move to different records or tabs, or use different ways to select a range of records.

Entering Data

At the start of a new school year, enter course information first, then enter teacher, student, and resource information, in that order. After that, you can enter new students, teachers, courses, and resources in any order.

To enter new records:

1. From the Main window, click the icon for Courses, Teachers, Students, or Resources.
2. From the File menu, choose New. An empty set of tabs appears.
3. Press Tab to move from one field to the next, or click the mouse in the field you want to edit.
4. Click the tabs to display different groups of information.



Saving Data

You cannot save a new or existing record until you type the name (last name for student or teacher) and ID number.

- Click Done to save and close the dialog, or click New in the top left corner of the dialog to save the record and start a new one.
- To discard a new record or changes to an existing record, click Cancel.
- You can use the Next Record and Previous Record button  to save changes and move to other records without closing and re-opening the dialog.

Duplicating Data

To save time, duplicate records, then edit them:

- Highlight a record in the Main window, then from the File menu, choose Duplicate.

Sibling records can be created this way. Just change the name, grade and personal information.

Teacher and course records can be duplicated and assigned to different tracks.

Fields that are not duplicated are Students' Activities, Comments, Groups, Status Codes, User-defined Codes and Conduct. The custom defined fields, codes, and lists in Multi-Data tabs are also not duplicated.

Selecting Records

You can select records quickly using a combination of these methods:

- Click the checkbox in the Selected column. The checkbox is checked. Click the checkbox again to deselect the record.
- Shift-click an unselected checkbox to select all records.
- Shift-click a selected checkbox to deselect all records.
- Control-Shift-click an unselected checkbox to select all records from that record to the end.
- Control-Shift-click a selected checkbox to deselect all records from that record to the end.
- Control-click an unselected checkbox to select all records from that record to the last record displayed in that window.
- Control-click a selected checkbox to deselect all records from that record to the last record displayed in that window.

The Selected column title shows, in parentheses, how many records are selected.

You can also select records using Select/Replace/Assign from the Edit menu. See "Selecting Data" on page 10.

You can work with only the selected records by copying them to a subset. See "Using a Data Subset" on page 18.

Importing Data

Import student, teacher, or course information from other databases or other programs with Win School's ASCII Transfer module. See the Win School System Administrator Guide and the ASCII Transfer Guide.

Deleting Data

When deleting students, create or update an Archive file to contain historical student information from Details and Report Cards.

If a student or teacher leaves during the current school year, make them inactive instead of deleting them. If you entered information for the student in the current year database, we recommend you delete the student in the next year database after Year End processing, not the current year.

You can hide inactive students by choosing Hide Inactive Students from the Edit menu.

For more information on Year End processing and managing Archive files, see the Win School System Administrator Guide.

To delete records:

1 Select records in the Main window by clicking the checkbox in the Selected column.

2 From the File menu, choose Delete and click Selected.

3 For students, click Yes to archive or No to delete without archiving.

Removing References and Locks

A reference is when another module, such as Scheduler, is referring to a record. A lock is when another user is modifying a record. The lock is removed when that user saves the changes.

You must remove the reference or lock before you can delete the record. If you try to delete a referenced or locked record, the message “Some records weren’t deleted because they had other references or were currently locked by another user” appears.

To remove references and locks:

1 If you are on a Multi-user system, go to the Shell.

2 From the Shell menu, choose Administrator Log to see if someone else is using the record in Details. If so, the record cannot be deleted until they close the record.

3 Start Scheduler.

- For a student, clear the student’s course requests, and all classes from the student’s timetable.
- For a teacher, remove all classes from the teacher’s timetable.
- For a course, remove all requests and sections for the course.

Using Custom Tabs and Multi-Data Tabs

You can define Custom tabs and Multi-Data tabs containing fields, lists, and codes. These are in addition to the user-defined fields, flags, lists, and codes.

In School Setup, use the Tabs menu to define fields, lists, and codes for students, teachers, and courses. You can also specify which tabs in Details show the data.

Working with information in Custom and Multi-Data tabs is the same as working with information in other tabs.

Changing Multiple Records

Use the Select/Replace/Assign command in the Edit menu to change multiple records based on criteria you define.

- Select finds and selects data. You can edit or report on this data.
- Replace replaces existing data with new data.
- Assign assigns new data to selected records.

Select/Replace/Assign is a powerful command. Back up your data before using this command, so you can restore if necessary. Replace data in a few records first, to make sure you have set the command correctly.

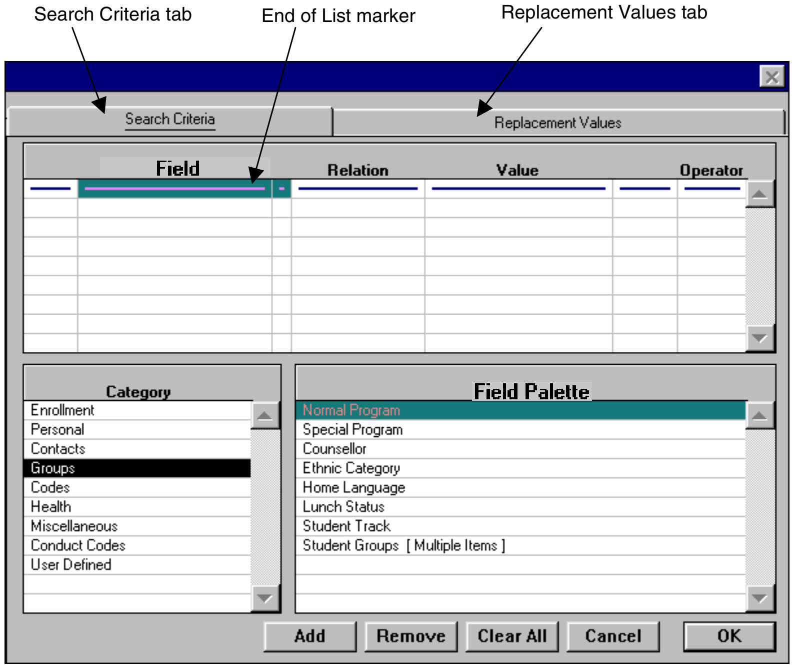
Selecting Data

To find and select data elements without changing them, you need only to use the Search Criteria tab. Each search condition includes a Field, Relation, Value, Operator, and sometimes, Brackets.

Fields

Use fields to define both the data you want to select, and the data to replace the found data. Fields identify specific data elements within the database, such as Student Name, and Gender.

You can define field formats for name, date, and other data, in any field with a yellow page icon beside it. Double-click the yellow page icon to change its format.



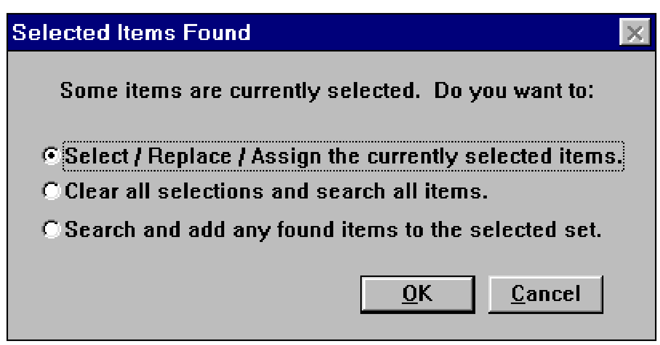
To select data:

1 In the Main window, select the view you want.

2 From the Edit menu, choose Select/Replace/Assign. If it is dimmed, you do not have access to the function. Check with your System Administrator.

3 If no items are selected in the Main window, the Select/Replace/Assign dialog opens displaying the Search Criteria tab.

If you already have items selected in the Main window, the Selected Items Found dialog appears. Select a radio button and click OK to display the Search Criteria tab.



4 In the upper list of the Search Criteria tab, make sure the End of List marker is highlighted. If not, highlight the End of List marker – the horizontal bar under the last field.

5 In the lower-left list, click the category from which you want to choose fields. For example, click Enrollment.

6 In the Field Palette list, double-click the field you want to search for. Or highlight the field and click Add. For example, double-click Student Homeroom. The item appears in the Field column in the upper list.

7 In the Relation column, click and hold to display options, then choose one.

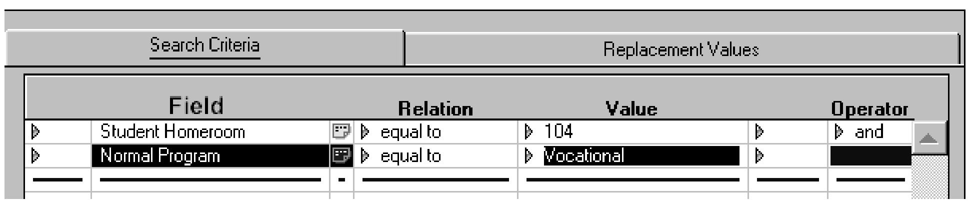
8 In the Value column, click and hold to display values, then choose one. For example, choose 104 as the Homeroom.

9 If you want to search for more than 1 field, use the Operator column to specify how to join the fields. Click and hold the Operator and choose “and” or “or”.

For details on using Relation, Values, and Operators, see the appropriate section following this procedure.

10 Repeat steps 4 to 8 to add another field.

For example, make sure the End of List marker is highlighted, then choose Groups in the Category list, and double-click Normal Program in the Field Palettes list. In the Value column, click and choose Vocational.



If you use “and” and “or” for several fields, use the appropriate brackets to set up the order of operation. Brackets are in the columns preceding Field and following Value. See “Using Brackets” on page 15.

You can define the formats for fields by double-clicking the icon to the right of the Field column. If the icon is not yellow, there are no formats defined.

11 Click OK to begin the search.

When the search process is complete, the items that match your search criteria are selected in the Main window.

You can copy the selected items to the subset by choosing Copy Selected to Subset from the Edit menu.

Work in the subset to edit the selected records, include them in reports, or perform additional replace and assign functions. See “Using a Data Subset” on page 18.

Setting Relation

You search by setting up a Field, which includes a Relation, Value, Operator, and sometimes, Brackets.

Relation	Definition
Equal to	The field data must exactly match the Value.
Not equal to	The field data can be anything but an exact match with the Value.
Contains	The field data must include the Value.
Not contains	The field data must not include the Value.
Start with	Text only. The characters at the beginning of the field data must exactly match the Value.
End with	Text only. The characters at the end of the field data must exactly match the Value.
Start at	The field data can be the same as the Value or come after it alphabetically or chronologically.
End at	The field data can be the same as the Value or come before it alphabetically or chronologically.
Greater than	The field data must be greater than the Value.
Greater or equal	The field data can be the same as or greater than the Value.
Less than	The field data must be less than the Value.
Less or equal	The field data can be the same as or less than the Value.
Not applicable	Constraints based only on Student Conduct, Status, and User-defined Codes. If only 1 field in the group is applicable to the constraint, the other fields are set up as not applicable.

Assigning Value

- To assign a value for most fields, put the cursor in a Value cell and type a value.
- You can leave Value empty for a text field, after the “equal to” or “not equal to” relation. The template then looks for items that either have no data entered in the field, or that have any data entered in that field.
- Yes/No flags, checkboxes, popup menu fields, and dates always have some value, if only N/A, so they are never empty.
- The Value for a numeric field defaults to zero if you leave it empty.

Choosing Operator

Constraints are separated by either “and” or “or.” Use the popup menu to toggle between the 2 options. The order of the constraints is important when you have a mixture of “and” and “or.”

Use “and” when you want each item to meet more than 1 constraint.

The following examples compare the search results using different operators when searching for Grades 5 and 6 in Homerooms 100 and 101.

For example, to select a list of Grade 5 students in Homeroom 100, the grade must be 5 and the homeroom must be 100.

Student	Grade is 5	Hmrm is 100	Grade is 5 and Hmrm is 100
Grade 5, Hmrm 100	Yes	Yes	Yes
Grade 5, Hmrm 101	Yes	No	No
Grade 6, Hmrm 100	No	Yes	No
Grade 6, Hmrm 101	No	No	No

The same criteria, separated by “or,” generate a much longer list.

Student	Grade is 5	Hmrm is 100	Grade is 5 or Hmrm is 100
Grade 5, Hmrm 100	Yes	Yes	Yes
Grade 5, Hmrm 101	Yes	No	Yes
Grade 6, Hmrm 100	No	Yes	Yes
Grade 6, Hmrm 101	No	No	No

For a list of Grade 5 and 6 students, students would not be in 2 grades at the same time.

Student	Grade is 5	Grade is 6	Grade is 5 or Grade is 6
Grade 5	Yes	No	Yes
Grade 6	No	Yes	Yes
Grade 7	No	No	No

Using Brackets

Use brackets to set up the order of operation when using a mix of “or” and “and” operators. When you include more than 2 or 3 search criteria, the logic of the expressions is more complex — particularly if you have a mixture of operators. As a result, records may not be found.

The order in which you list criteria is important. Data is analyzed for the first criterion, then the second, and so on. Only data that meets all the criteria is selected.

Examples

When the order of operation is simple, don’t use brackets, as in these 2 examples:

grade = 11 or homeroom = 104 or grade = 10 or homeroom = 101

grade = 11 and homeroom = 104 and grade = 10 and homeroom = 101

When the order of operations is not simple, use brackets to indicate the order, as in this example:

(grade = 11 or homeroom = 104) and (grade = 10 or homeroom = 101)

Replacing Data

The Replace function replaces data in records selected by the Search Criteria.

Use the Replace function when global data changes are needed or when you’re preparing data for a new year. For example, this function is useful if you want to move all students in one homeroom to a different homeroom, or give all students in one homeroom the same counselor.

When using the Replace function, define both the Search Criteria tab and Replacement Values tab in the Select/Replace/Assign dialog. The Replacement Values tab also has a Field and a Value column.

The Replacement Method column is only needed when you use a Group field. See “Choosing a Replacement Method” on page 17.

When you click OK, Select/Replace/Assign completes the entire process of search, select, replace, and assign without intervention.

When replacing a student status code, you cannot replace or delete the first Entry enrollment code.

To replace data:

1. Complete the Search Criteria tab.
2. Complete the Replacement Values tab. If necessary, define the formats of fields. Click OK to start the replacement.

   To check the data that was replaced, look at individual records.

Assigning Data

The Assign function both replaces data and enters new data in selected records. Assign writes data to selected fields, whether the fields already hold data or are empty.

Assign is often used to prepare data for a new year, for example, assigning all students in one homeroom to another.

You can also use Assign when new data does not relate to existing data. For example, manually selecting students to be assigned to a counselor.

Use Assign after selecting records, then assign a new condition.

To assign, use only the Replacement Values tab on selected records. Do not use the Search Criteria tab.

You cannot replace or delete a student's first Entry enrollment status code.

To assign data:

1 Select the view and the records to assign data.

2 From the Edit menu, choose Select/Replace/Assign.

3 In the Selected Items Found dialog, choose the "Select/Replace/Assign the currently selected items" radio button. Click OK.

4 Click the Replacement Values tab and choose the field(s).

5 Click OK to assign the data.

Changing Codes and Group Records

You can include multiple fields in the Search Criteria tab, or you can use a group field, such as status codes or student groups. A group field includes a series of items and is identified by [Multiple Items] following the name in the Field Palette column.

You can use only one group field in a search, replace, or assign. If you need more than one group field, repeat the search, replacement, or assignment for each group.

In the Search Criteria tab, you can change the Relation, Value, and Operator of each item in the group field, and you can add and change brackets. See "Setting Relation," "Assigning Value," "Choosing Operator," and "Using Brackets" on pages 13 to 15.

In the Replacement Values tab, use the title in the first line of the group field to choose a replacement method. You can also change the Value and Replacement Method for each item in the group.

To delete a group field, highlight its title in the upper list and click Remove. You cannot delete items within a group, you must delete the whole group.

Choosing a Replacement Method

How you define the Search Criteria depends on the Replacement Method you choose. You must set up Replacement Values for all replacement methods. The table below lists each Replacement Method, what it does, and its Search Criteria requirements.

			Sample Results of Each Replacement Method		
Replacement Method	**What It Does**	**Search Criteria Requirements**	**Existing Data**	**Replace-ment Data**	**Results**
Add to existing	Adds the replacement data at the end of the existing data.	None. No reference to existing data is required for an addition.	Photo Club Yearbook	Drama Club	Photo Club Yearbook Drama Club
Replace first match	Replaces only the first matching occurrence of the data.	Required. Fields must correspond to the Replacement Values set.	Photo Club Yearbook	Drama Club	Drama Club Yearbook
Replace all matches	Replaces all matching occurrences of the data.	Required. Fields must correspond to the Replacement Values set.	Photo Club Yearbook	Drama Club	Drama Club Yearbook
Delete first match	Deletes only the first occurrence of the data.	Optional. If selected, the first matching occurrence of the data is deleted. If not selected, the first existing group is deleted.	Photo Club Yearbook	none	Yearbook
Delete all	Deletes all occurrences of the data.	Optional. If selected, all matching occurrences of the data are deleted. If not selected, all occurrences are deleted.	Photo Club Yearbook	none	all groups deleted

Example of Selecting and Replacing a Group Field

1. In Students view in the Main window, choose Select/Replace/Assign from the Edit menu, then click the Groups Category, and double-click Student Groups [Multiple Items].
2. To replace only the group name, choose Baseball as the Value for the Student's Group.

For all the other items in the group, choose not applicable in the Relation column.

	Field	Relation	Value		Operator
(	Student Groups				
	Student's Group	equal to	Baseball		and
	Group Membership Start Date	not applicable	Jan 07, 98		and
	Group Membership End Date	not applicable	Jun 07, 98	)	

3 Click the Replacement Values tab.

4 In the Replacement Values tab, click the Groups Category, then double-click Student Groups [Multiple Item].

5 In the Replacement Method column on the right, choose replace all matches.

6 For the Student's Group, choose Choral Group for the Value, and applicable for the Replacement Method.

7 Leave not applicable as the Replacement Method for everything else, then click OK. Win School completes the search, select, and replace.

Field	Value	Replacement Method
Student Groups		replace all matches
Student's Group	Choral Group	applicable
Group Membership Start Date	Jun 09, 98	not applicable
Group Membership End Date	Jun 09, 98	not applicable

The search is on the group name and only the name is replaced or assigned. The dates are ignored.

Using a Data Subset

Use a data subset to work with non-sequential records. Select records in the Main window, copy them to the Subset window, then work with them as you would in the Main window. Changes you make to a subset are saved just as they would be in the Main window.

When you work with dialogs in a subset record, the and buttons move through the subset records, not the main records.

To use a data subset:

1 Select records in the Main window.

2 From the Edit menu, choose Copy Selected to Subset.

3 Click the Subset button under the view icons to work with the subset. Any changes you make to the subset are saved exactly as they are in the Main window.

4 To clear the subset, choose Clear Subset from the Edit menu.

5 To return to the Main window, click the All button under the view icons.

Recording Transfers in Student Records

Use Transfer Recording to keep track of transfers for homeroom, grade, track, and normal program. Turn on Transfer Recording in School Setup to log transfers within the current school year. Use the Transfer Editor in Details to display and edit student transfers.

Transfers are ordered by type and date in lists. Each transfer type has its own list. The first start date in each list is the date of enrollment and cannot be changed. This is the first date that the student joined the homeroom, grade, track, or normal program.

If you add transfers, each transfer defaults to the next sequential date.

Each transfer of any type must have a unique date.

If you have a large database, recording transfers might slow down Win School.

To turn on transfer recording:

1 Quit Details.

2 Start School Setup.

3 From the School menu, choose Transfer Recording, then click Yes to log changes.

4 Click OK.

5 Quit School Setup.

To display and edit transfers:

1 Start Details.

2 Highlight a student record.

3 From the Edit menu, choose Transfer Editor.

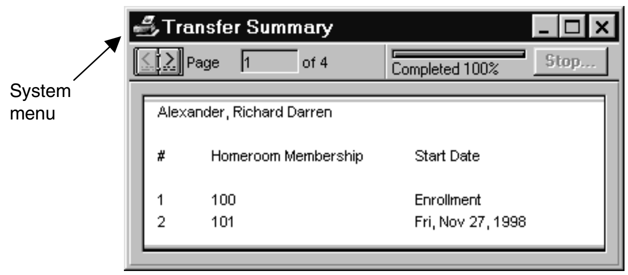
- To change a transfer, choose from the popup menu in the homeroom, track, grade, or program list.

- To change a date, highlight the date and type the new one, pressing Tab to move from month to day to year.
- To add a transfer, click the list where the transfer is being added, then click Add.

  Choose the appropriate option from the popup menu.

  Type the effective transfer date.
- To print a transfer report, click Print to display the report. To send the report to the printer, choose Print from the System menu.

  The System menu is the icon directly to the left of the window title.



For a more compact version of this report, see "Student Transfers Report" on page 65.

Entering Course Details

Overview

Course information is required for the Scheduler and Report Cards modules. After you create courses in Details, you can create classes, which are the sections of each course, in Scheduler or Report Cards.

If you only use the Attendance module, and do not record attendance by class, you do not need to enter course information in Details.

Changes cannot be made to the following fields in Course Details after you create sections for a course:

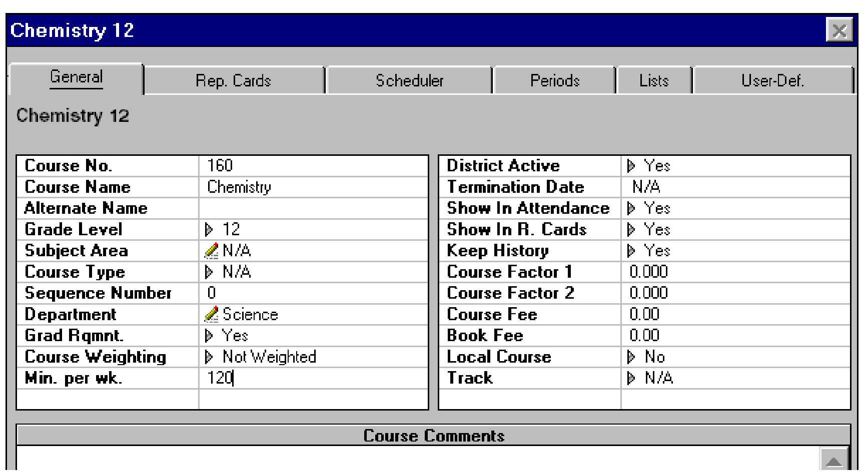
Tab	**Field**
Scheduler	Course length (in terms) Scheduling Credits Use in Scheduler District Use Only
Periods	No. of unique block letters

For both elementary and high schools, courses are directly related to marks. If different marks are reported for different subjects such as Language Arts, Social Studies, or Arithmetic, create one course for each different subject.

Each tab is discussed in order from left to right, top to bottom, as it is displayed in Details.

General Tab

The General tab contains basic information about each course.



Course No.

Course numbers can have up to 9 characters, common or unique, numeric or alphanumeric, as you defined in School Setup. To use Scanning to enter student requests, course numbers must be unique and numeric.

Course Name

Course names can have up to 20 characters. Do not include grade levels in course names. If you use Scheduler, make the Course Name or the Alternate Name as concise as possible. Some columns might be too narrow to display all 20 characters.

Alternate Name

Optional. Alternate names can be up to 20 characters. Some users have 2 versions of the course name, one abbreviated. Other users have a version of the name for internal use only (Honors Math 11) and another for timetables and reports (Math 11). Both fields are available in Scheduler, and you can toggle between them. In Report Manager, you can create reports showing the Course Name or Alternate Name.

Grade Level

You must set up grades in School Setup. The grade of a course is used by Scheduler to determine required and requested status for various students in various courses. If a course, such as Lunch or Study Hall, has no grade, choose N/A.

Subject Area and Course Type

Optional. You can set up Subject Areas and Course Types in School Setup, Courses menu. For example: Special Education, English Second Lang., Apprenticeship, or College Prep. Or you can classify by type of work, for example: Academic, Project, or Lab.

Sequence Number

Optional. You can sort courses and classes by their sequence number in lists and reports. If a specific order is required on report cards, such as academic courses first, use sequence numbers. Low numbers appear first in the list, and you can type numbers up to 32,000.

Department

Optional. You can set up departments in School Setup, Details Lists menu.

Grad Rqmnt.

Optional. Choose Yes for students who must pass the course to move to the next grade. This setting does not affect Scheduler. If set to Yes, a student who fails the course has a Failed status in class rank calculation in Report Cards.

Course Weighting

Optional. You can make weighted and regular GPA calculations in Report Cards. The weighted calculations benefit students taking more demanding courses. Usually, schools weigh academic courses.

Min. per wk.

Optional. Number of minutes per week of instructional time for 1 class of the course. You can report on this figure in custom reports. Otherwise, it is not used by Win School.

District Active

Optional. Set this to Yes for courses being taught in the current year, and set to No for courses not being taught, but being retained for future years.

Termination Date

Optional. In most cases, the date should be N/A. If the course is going to be withdrawn from your curriculum, type its termination date.

Show in Attendance

If you take class or period attendance, set this field to Yes. Set courses such as Lunch to No, so they don't appear in the Attendance module.

Show in R. Cards

For the Report Cards module. For courses you want to appear in Report Cards, set to Yes. For courses such as Lunch and Homeroom, set to No.

Keep History

If Show in Attendance is set to Yes, then you must set Keep History to Yes. If you do not take attendance for this course, set to No.

When you set Keep History to Yes, Scheduler keeps a historical roster of the class, so that Attendance and Scanning show who was in each class on any given day, even if the students transfer out of the class.

If Keep History is set to No, the historical roster is not kept, which saves disk space, but you cannot track attendance for that class.

If you use Scheduler and keep period attendance, set Keep History to Yes for most classes. For courses such as Lunch, set to No.

Course Factor 1 and 2

Not currently used.

Course Fee and Book Fee

Optional. If your school charges a fee for courses or books, type the fee.

Local Course

Optional. Choose Yes if the course was created by someone at your school and is not normally taught at other schools.

Track

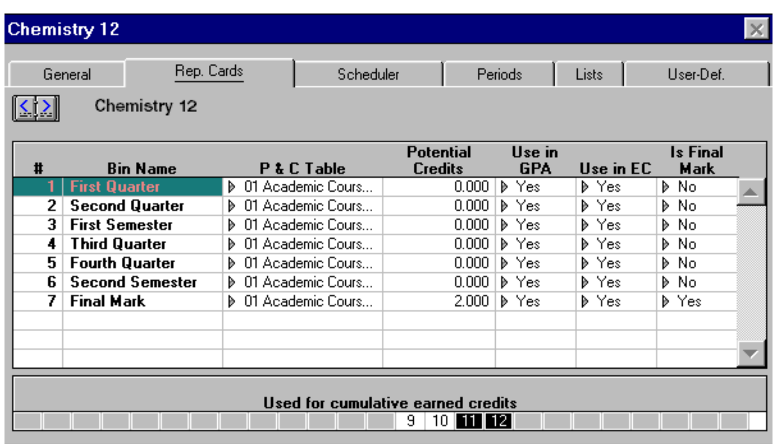
If your school is a year-round school or if you use the Track field for another purpose, choose a track. A course can belong to only 1 track. You must create a separate course for each track in which a course is taught. Duplicate data to build courses quickly; see “Duplicating Data” on page 8.

Rep. Cards Tab

All information in this tab is for the Report Cards module.

All Report Card bins created in School Setup are listed in this tab. The 5 columns following the Bin Name column match fields that appear for each bin in the Report Cards module. In this tab, set the default values for the course in the Report Cards module.

Initial default values are read from Details and entered into Report Cards. Later changes are not read by Report Cards. To update bin information from Details, use Clear/Set Bin Info in Report Cards.



P & C Table

For each bin, choose the Points & Credits table to be used for this course. Up to 15 Points & Credits tables can be created in School Setup.

Potential Credits

If you change a Potential Credit, use Clear/Set Bin Info Report Cards to update the change.

The potential credit value of a course is the maximum number of credits a student can earn in the course.

Type the number of potential credits each bin represents. If potential credits are awarded using 1 final mark only, put the full potential credit value in any bin that can contain the final mark. If final marks are a combination of several bins, divide the potential credits among those bins.

If you use a GPA or earned credit formula that weights marks using potential credits, type a potential credit value in any bin that can be used for GPAs or earned credit totals. Potential credit value must reflect weighting.

A bin with zero potential credits counts as zero and is not included in calculations.

Use in GPA and Use in EC

Set Use in GPA to Yes for all bins containing marks to be used in GPA calculations.

Set Use in EC to Yes for all bins containing marks to use in earned credit calculations.

In the Report Cards module, the Used in GPA and Used in E. Credits checkboxes will be selected for these bins. If you change a Use in GPA or Use in EC setting, run Clear/Set Bin Info in the Report Cards module to apply those changes to bins you have already edited.

Is Final Mark

Set Is Final Mark to Yes for bins to be used for the final GPA and earned credit calculations.

If final marks are a combination of several bins, choose Yes for each bin. If no mark is found in a bin, that bin is not included in the average.

If a student has marks in more than 1 bin in which Is Final Mark is selected, grade points from those bins are averaged and credits are totaled.

Used for cumulative earned credits

Select the grades of students who can have credit for the course added to their cumulative earned credits.

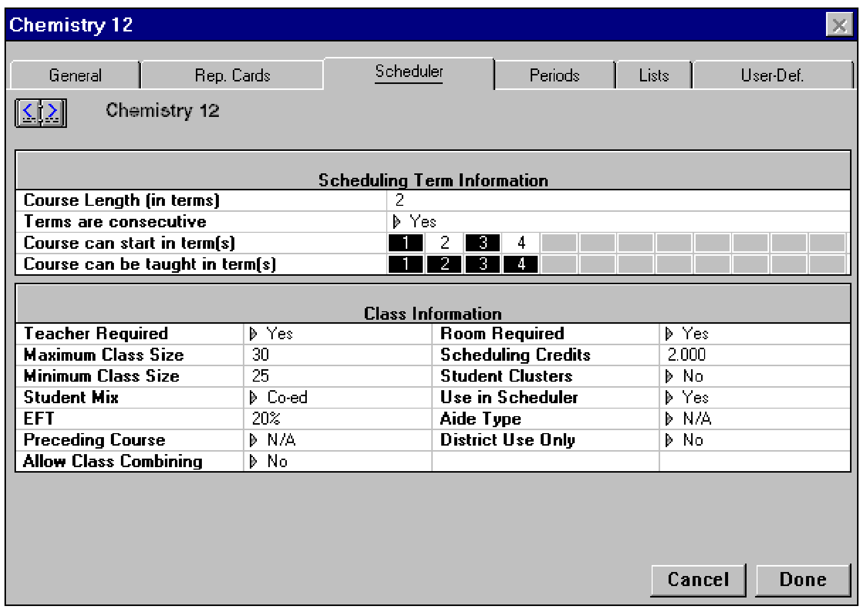
If any student can get credit, select all grades.

If Grade 12 students cannot get credit for a Grade 8 course, deselect Grade 12.

Grades defined as Not Used in School Setup do not appear in this list.

Scheduler Tab

The information in this tab is for the Scheduler module.



Course Length (in terms)

Type the number of terms that 1 section of this course will be taught.

The number and date ranges of terms are created in the School Setup module, Set Scheduler Terms menu. The number of terms you created is shown in Course can start in term(s), and Course can be taught in term(s).

Terms are consecutive

Choose Yes if the course runs for more than 1 term and those terms must be consecutive.

Course can start in term(s)

Select the terms in which classes can start for the course. The length of the course can restrict the possible starting terms.

Create number and date-ranges of terms in School Setup, Set Scheduler Terms menu.

Course can be taught in term(s)

Select the terms in which classes can be taught for a specific course.

Create number and date-ranges of terms in the School Setup module, Set Scheduler Terms menu.

If your school is a year-round school, it is imperative that you deselect the terms that are holidays for the course track.

Teacher Required

Choose Yes so the Scheduler module will not place students without a teacher. The Assign Students option of Scheduler can manually override and place students without an assigned teacher.

Select No for courses such as Lunch.

The Create Timetable function in Scheduler always tries to schedule classes with teachers and rooms, whether or not Yes is selected. If you want to schedule a class with no teacher, either schedule it manually, or, in Scheduler, check the “Ignore rooms and teachers” checkbox in the Create Timetable dialog in the Schedule menu.

Maximum Class Size

Type the maximum number of students that can take 1 section of this course. Scheduler uses this number to calculate the minimum number of sections necessary to fill requests for the course.

Minimum Class Size

Type the minimum number of students that can take 1 section of this course. No matter what number you use as the minimum class size, if the course has a request, Scheduler will create at least 1 section of the course.

You can select minimum class size based on an average class size. Use the following formula:

Minimum size = (2 x Average size) - Maximum size

If you want an average class size of 25 and the maximum is 30, you would type a minimum of 20:

Minimum size = (2 x 25) - 30

Minimum size = 50 - 30

Minimum size = 20

Do not set your Minimum class size to a very low number. Use the formula provided. Otherwise, too many sections will be created in Scheduler. In the Scheduler module, you can manually change the number of sections.

Student Mix

If you want, choose any gender restrictions for this course. Student request and student timetable windows in Scheduler display gender restrictions. Assign Required in Scheduler will not generate requests for a course for students who do not meet its gender restrictions.

EFT

Optional. Type the percentage of a full-time teacher load that teaching a class of this course would represent.

Equivalent Full Time (EFT) report in the Scheduler module uses these values to calculate the teacher resources used by each course and department.

Preceding Course

Optional. Choose any course that students must be scheduled into before being scheduled into this course. All sections of the Preceding Course will be scheduled in a prior term before any sections of the course you are defining.

Allow Class Combining

Optional. If the course can be combined with another, choose Yes.

Room Required

Choose No for courses such as Lunch. Choose Yes for most courses.

The Assign Students function in Scheduler places students in a section only if a room is required. To place students in the class anyway, use an Assign Students option.

Scheduling Credits

Optional. Type the maximum scheduling credit value of the course. You can use up to 3 decimal points. Scheduler uses this value to tally the number of credits requested and scheduled for each student. Scheduler compares Scheduling credit totals with the required credit total defined in School Setup for each program and grade.

Report Cards does not use Scheduling Credits, only Potential Credits as defined in the Rep. Cards tab, and the students' earned credits.

After sections have been set for a course, this field cannot be changed.

Student Clusters

Choose Yes if students in 1 or more programs take this course in student clusters. Identify which programs have students take this course in clusters by making this course Required for those programs in the Required view of the Lists tab.

Use in Scheduler

Choose No to prevent the course from appearing in course or class lists in Scheduler, and to prevent students from being scheduled into the course.

Aide Type

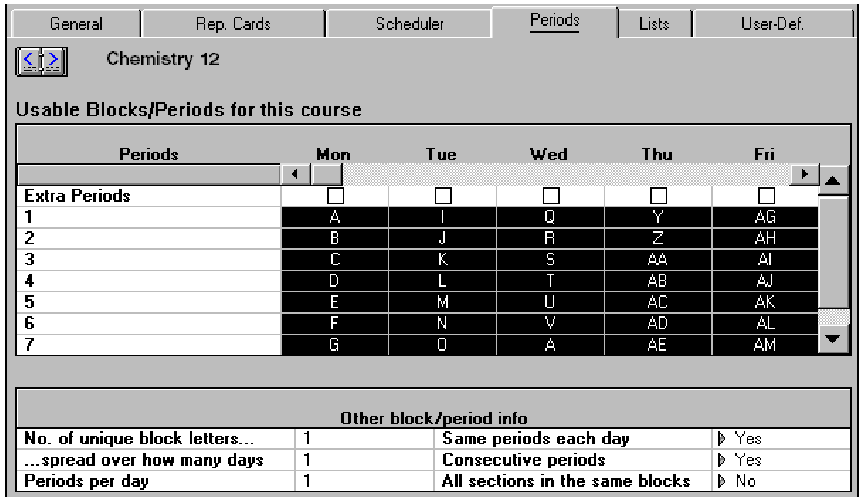
If the course requires teacher aides, choose an aide type, otherwise, choose N/A to ensure that no aide is assigned.

District use only

Choose Yes to have the course appear in course or class lists in Scheduler, but only when Show All District Items is also selected in Scheduler Preferences.

Periods Tab

The information in this tab is for the Scheduler module.



Usable Blocks/Periods for this course

Select the blocks, days, and periods into which the Create Timetable function can schedule the course. The selected blocks are also identified in the dialog where you manually schedule classes. Create Timetable will not schedule the course into deselected blocks, but you can do it manually.

If you have repeated blocks in your timetable, when you click one block letter, the same change is made for all copies of that letter. Whatever is scheduled in a block in one place in the timetable is scheduled in that block everywhere.

Do not be more restrictive than necessary. The more restrictive you are, the more difficult it will be to schedule your school. If a course can only be taught at a certain time, schedule it manually and lock it before using Create Timetable to schedule the rest of the classes.

- Click a block to select or deselect it.
- Shift-click any block to select or deselect all blocks.
- Control-click a block to select or deselect all blocks in that period.
- Control-right-click a block to select or deselect all blocks in that day.

Extra Periods

Select Extra Periods for days that a class meets extra times, or if a section of the course is taught more frequently on some days than on others, such as courses like band or theatre, when long rehearsals are needed.

Scheduler schedules the number of blocks per day, then divides any remaining blocks among the days with Extra Periods selected, according to the number of blocks you set.

If the extra period can be on any day, select Extra Period(s) on all days. Create Timetable picks as many days as necessary from those selected.

No. of unique block letters

Scheduler uses this number to determine whether or not a class is fully scheduled in the school timetable.

After sections have been set for a course, this field cannot be changed.

Type the number of blocks for 1 section of the course. If your block timetable has repeating blocks, count a repeated block only once.

Spread over how many days

Type the number of different days from which Scheduler should pick blocks for each section of this course. This number cannot be greater than the number of unique block letters.

If every day has all new block letters, the maximum number of days is the number of days in your cycle.

If your timetable has repeating blocks, type the number of days in which a new block letter is introduced. If all block letters appear on Monday, and Tuesday through Friday contain repetitions of Monday block letters, then the maximum number of days you can type is 1.

Periods per day

Type the number of periods per day 1 section of the course will be taught. If classes meet a different number of times on different days, type the lowest number (not zero). Select Extra Period(s) in the block timetable in this tab for all of the days in which the class meets or can meet more than the minimum number of times.

Same periods each day

Choose Yes if you want each section of this course to meet in the same period each day. Different sections can meet in different periods. If you select any Extra Periods, choose Yes for Same periods each day.

Consecutive periods

Choose Yes for periods to be consecutive in a day. If you select any Extra Periods, choose Yes for Consecutive periods.

All sections in the same blocks

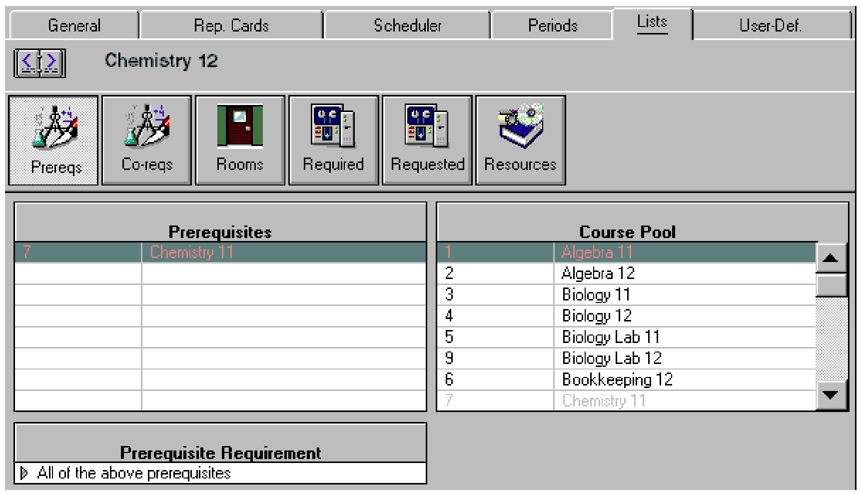
If you want all sections of this course to meet at the same time, choose Yes.

The course cannot belong to a Following Triplet or Linked Group.

Lists Tab

All the information in this tab is used by the Scheduler module.

- To move a listed item from the right column of the tab to the left column, double-click that item.
- To remove an item in the left column, select it and press Delete.



The icons under the course name change the display in the tab.

Prerequisites

Prerequisites are courses that must be passed before taking another course. In the student request and student timetable windows for each course, Scheduler shows completed prerequisites and lists missing prerequisites.

In the Course Pool list, double-click all Prerequisites for the course. In the Prerequisite Requirement popup menu, choose whether students have to meet one or all of the listed prerequisites.

Co-requisites

The Co-requisites list operates like the Prerequisites list. Co-requisites are courses students must take in the same term as another course. If Scheduler finds a co-requisite missing, it gives the student a request for the co-requisite.

In the Course Pool list, double-click all Co-requisites for the course.

Rooms

The Preferred Rooms list determines the rooms or room types in which the course can be taught. Restrict as little as possible.

If you can, give priority to either teacher room preferences or course room preferences, then be as restrictive as necessary with 1 set of preferences and as unrestrictive as possible with the other. Scheduler needs at least 1 common room for the course and teacher. Problems in scheduling are often caused by conflicting room preferences.

In the Room Pool list, double-click the rooms suitable for the course. If the course can be taught in any room, delete all room types from the Preferred Rooms list.

Required

Identifies the programs for which the course is required.

The course is identified as required in the Student Request and Student Timetable windows of Scheduler, for any student in one of these programs, in the same grade as the course, and meeting any gender restrictions for the course. The Assign Students function in Scheduler gives preference to required courses when filling student requests.

The Program Pool contains all normal programs, followed by all special programs, which are marked with asterisks.

The order of Required Programs is not important. A course can be required for a maximum of 20 programs.

In the Program Pool list, double-click the program for which this course is a requirement.

Requested

Identifies the programs for which you want to generate requests for students.

The Assign Required function in Scheduler gives a request for the course to any student in one of the programs, in the same grade as the course, and meeting any gender restrictions for the course.

The Program Pool contains all normal programs, followed by all special programs, marked with asterisks.

A course can be requested for a maximum of 20 programs. The order of items is not important.

In the Program Pool list, double-click the programs whose students should request this course.

Resources

Assign resources required for the course to a maximum of 20 per course. Resources records are created in Resource Details.

In the Resource Pool list, double-click the resources required for this course.

User-Def. Tab

The information in this tab is used only for custom reports.

The user-defined fields and flags named in School Setup appear in this tab. Type the data according to your school specifications. Up to 15 characters can be typed in text fields.

Custom Tabs (Courses)

Optional. The information in these tabs is used only for custom reports.

In addition to the data in the User-Defined tab, you can define up to 10 Custom tabs containing fields, codes, and lists.

Custom tabs appear in its own row. Only defined tabs appear. If you do not define any Custom tabs, then no Custom tabs appear.

The default access level for Custom tabs is None for all users other than the Administrator. Assign access levels in School Setup, Passwords menu.

To define Custom tabs, use the Custom Tab Designer in the Tabs menu in School Setup.

Multi-Data Tab (Courses)

Optional. The information in this tab is used only for custom reports.

In addition to User-Defined and Custom tabs, you can define a Multi-Data tab containing fields, codes, and lists.

You can define up to 2 titles or headings for the Multi-Data tab. Use the VCR buttons to switch headings.

Only the defined headings appear. If you do not define anything for the Multi-Data tab, it does not appear.

The default access level for Multi-Data tabs is None for all users other than the Administrator. Assign access levels in School Setup, Passwords menu.

To define the Multi-Data tab, use the Multi-Data Tab Designer from the Tabs menu in School Setup.

Scheduling Courses

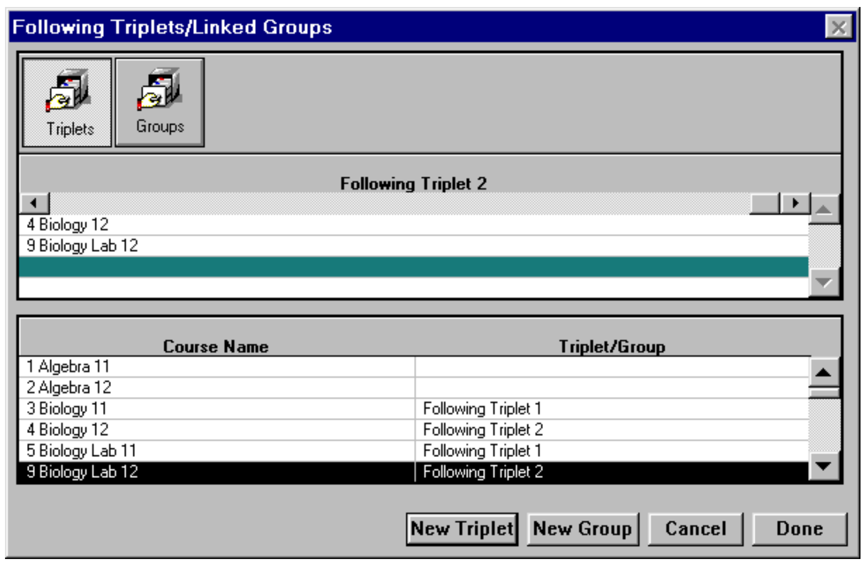
You can set up courses to be taught at the same time or in consecutive periods. You can also set up courses to be taught in the same period on different days or different terms.

Scheduling Courses in Consecutive Periods

To set up courses that must be taught in consecutive periods, use the Following Triplets/Linked Groups command.

Following Triplets is a group of 2 or 3 courses that Scheduler should schedule in consecutive periods, such as Biology and Biology Lab. These courses get scheduled in the order you specify in the Following Triplets dialog.

A course can belong to either a Following Triplet or a Linked Group, but not both. Linked Groups are courses that are taught at the same time.



To assign courses to consecutive periods:

1 In the Courses view of the Main window, choose Following Triplets/Linked Groups from the Details menu.

2 Click the Triplets icon to display Following Triplets in the upper list.

The lower list displays all courses on the left, and whether a course already belongs to a triplet on the right.

Use the horizontal scrollbar at the top of the upper list to see triplets.

If the top list is blank, go to Step 4.

3 Click New Triplet.

4 In the lower list, double-click course names in the order they are to be scheduled. A Triplet can include 2 or 3 courses.

To delete a Following Triplet:

- Find the Triplet using the horizontal scroll bar in the upper scrolling list. Highlight each course, then press Delete.

Scheduling Courses in the Same Period

To set up courses that must be taught in the same period on different days or in different terms, use the Following Triplets/Linked Groups command.

Linked Groups are courses that Scheduler should schedule in the same period on different days, such as Algebra and Geometry, so that students have a Math class the same period everyday. There is no limit to the number of courses you can set up in each Linked Group.

A course can belong to either a Following Triplet or a Linked Group, not both.

To assign courses to the same period:

1 In the Courses view of the Main window, choose Following Triplets/Linked Groups from the Details menu.

2 Click the Groups icon to display existing Linked Groups in the upper list.

   The lower list displays all courses on the left, and whether a course already belongs to a group on the right.

   Use the horizontal scrollbar to see existing groups.

   If the top list is blank, go to Step 4.

3 Click New Group.

4 In the lower list, double-click course names in the order they are to be scheduled. A group can include unlimited courses.

To delete a Linked Group:

- Find the Linked Group using the horizontal scroll bar in the upper scrolling list. Highlight each course, then press Delete.

Entering Teacher Details

Overview

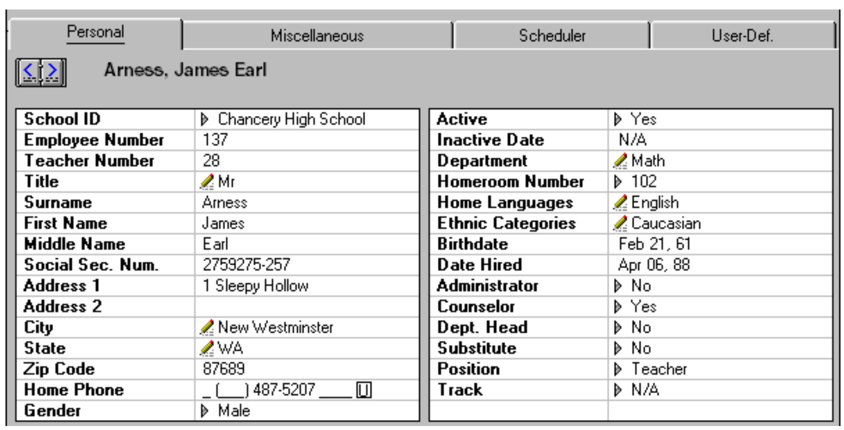
Teacher records are required for classes created in Report Cards or Scheduler.

You must set up all Win School users, regardless of their position. Set up non-teaching staff members as Don't Schedule in the Scheduler tab.

Each tab is described in order from left to right, top to bottom, as displayed in Details.

Personal Tab

This tab contains basic information about each teacher or staff member. You must enter a surname and teacher number before you can save a record. We recommend you also set up homeroom numbers as soon as possible.



School ID

Select a home school for the teacher. Teachers can be sorted by school name.

Employee Number

Optional. Type an employee number of up to 9 characters. This number can be the same as the Teacher Number.

Teacher Number

Type a unique teacher number of up to 9 characters. Teacher numbers are used throughout Win School.

Address 1, Address 2, City, State, Zip Code, Home Phone

Type address information and home phone number. Select city and state from the popup menus. The area code and extension number are optional.

Active

For most teachers, choose Yes.

When teachers go on temporary leave from the school for the current year, choose No instead of deleting them from the database. You can change them back to active when they return. You can exclude inactive teachers in reports.

Inactive Date

Optional. If a teacher is leaving the school, you can type the effective date of resignation. This information is available for custom reports.

Homeroom Number

Homerooms already assigned to other teachers are dimmed and cannot be chosen. Teachers can be sorted by homeroom.

Home Languages, Ethnic Categories

Optional. You can change these options in School Setup, Student - General menu.

Administrator

If Yes, this teacher is added to the list of administrators that appears in the student Conduct tab.

Counselor

If Yes, this teacher is added to the list of counselors that appears in the student Groups tab.

Dept. Head

Optional. This information is available for custom reports only.

Substitute

Optional. This information is available for custom reports only.

Position

Optional. This information is available for custom reports only. Principal can be selected for only 1 person in Details. When Principal is assigned, it is dimmed in the popup menu for all other staff members.

Track

Select a track if your school is a year-round school or uses Track for another purpose. Teachers can be sorted by track. If teachers teach more than 1 track, they must be duplicated. See “Duplicating Data” on page 8.

Miscellaneous Tab

The Miscellaneous tab contains contact and credentials information for the teacher. The information in this tab is optional. It is used for Query and reporting purposes only.

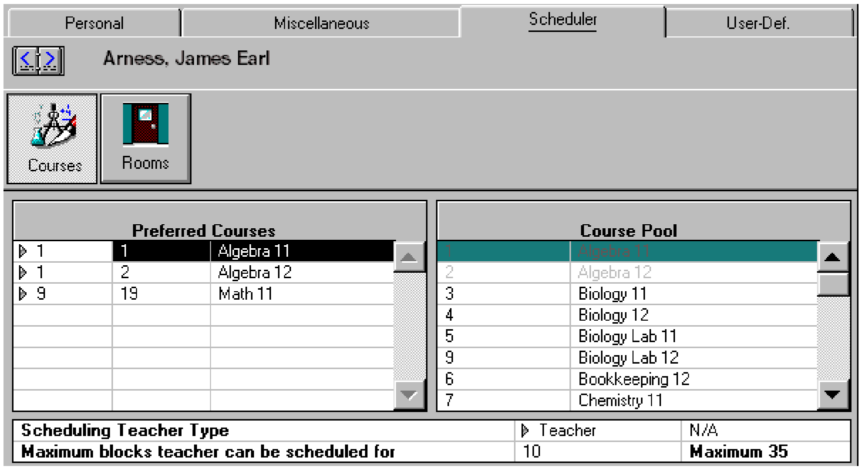
Teacher Credentials

This is a scrolling text field. Type any characters.

Scheduler Tab

The data in this tab is used by the Scheduler module. If you don’t use Scheduler, ignore this tab.

- To move an item from the right column of the tab to the left column, double-click the item.
- To remove an item from the left column, highlight it and press Delete.



Courses View

Click the Courses icon to display the Courses view.

Preferred Courses and Course Pool

Set up the courses that the teacher can teach, then assign what preference the teacher has for teaching the course.

When you choose a number to indicate the teacher preference for the course, use the following legend: 9 as best-teacher-for-course, 5 as can-teach-course, and 1 as unsuited-for-course.

For teachers with the same preference number, the Load Teachers function in Scheduler loads teachers by total course load, with the lowest first, to balance teacher loads.

To set teacher courses and course preferences:

1 In the Course Pool list, double-click all the courses the teacher can teach.

2 In the Preferred Courses list, choose the teacher preferences for each course you set up.

Rooms View

Click the Rooms icon to display the Rooms view.

Preferred Rooms and Room Pool

Set up a maximum of 8 rooms and room types. Order is unimportant.

All room types and rooms appear in the Room Pool list. Rooms from other schools and rooms not designated For Scheduler in the School Setup, Rooms menu do not appear in the Room Pool.

Scheduler must find at least 1 common room in the Rooms lists of the course and its teacher. Scheduling conflicts are often the result of incompatible teacher and course room preferences.

Restrict as little as possible. Give priority to either teacher room preferences or course room preferences, then be as restrictive as necessary with 1 set of preferences, and as unrestrictive as possible with the other.

To set teacher room preferences:

- In the Room Pool list, double-click all the rooms in which the teacher can teach.

Scheduling Teacher Type

Set up whether the teacher is an actual teacher or a teaching aide.

The normal setting is Teacher, which Scheduler loads for courses, using the course preferences you set in this tab.

Use Teaching Aide, Substitute, or Don't Schedule for non-teaching staff. The record will not load automatically in Scheduler. If you want the person to be scheduled to teach a class, manually load or schedule the person.

To set teacher type:

1. In the left popup menu, choose the teacher type.
2. If you choose Teaching Aide, choose the Aide type from the right popup menu.

Maximum blocks teacher can be scheduled for

This is the maximum teacher load defined in School Setup, which you can lower for a teacher if the teacher has other duties. Type the teacher's maximum teaching load, if it is lower than the maximum.

User-Def. Tab

Optional, used only for custom reports.

The user-defined fields and flags you created and named in School Setup appear in this tab. Type the data according to your school specifications, up to 15 characters in text fields.

Custom Tabs (Teachers)

Optional. The information in these tabs is used only for custom reports.

In addition to the data in the User-Defined tab, you can define up to 10 Custom tabs containing fields, codes, and lists.

Custom tabs appear in their own row. Only the tabs you define appear.

The default access level for Custom tabs is None for all users other than the Administrator. Assign access levels in School Setup, Passwords menu.

To define Custom tabs, use the Custom Tab Designer in the Tabs menu in School Setup.

Multi-Data Tab (Teachers)

Optional. The information in this tab is used only for custom reports.

In addition to User-Defined and Custom tabs, you can define a Multi-Data tab containing fields, codes, and lists.

You can define up to 2 titles or headings for the Multi-Data tab. Use the VCR buttons to switch headings.

Only the defined headings appear. If you do not define anything for the Multi-Data tab, the Multi-Data tab does not appear.

The default access level for Multi-Data tabs is None for all users other than the Administrator. Assign access levels in School Setup, Passwords menu.

To define the Multi-Data tab, use the Multi-Data Tab Designer in the Tabs menu in School Setup.

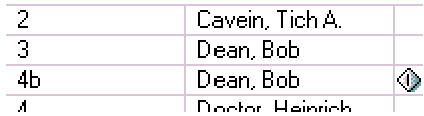
Assigning Teachers

After entering teacher details, you can assign teachers to teach consecutive periods or teach as a team. Do this in the Teachers view of the Main window.

Cloning Teachers

Scheduler matches 1 period with 1 teacher in 1 room teaching 1 class. If you need to schedule a teacher for more than 1 class in the same period, you need to ‘clone’ the teacher. For example, if 2 classes of PE 11 meet in the Gym for Period 2, clone the teacher.

In the Main window, a diamond symbol identifies a cloned teacher.



For 1 teacher to teach 2 classes at once, or 2 teachers to teach in the same room at the same time, use Resource Mapping in the Scheduler module. See the Scheduler Guide for more information.

You can also clone a room to schedule more than 1 class in the same room at the same time. See Clone Room in the School Setup Guide.

To create a teacher clone:

1 Highlight a teacher in the Main window.

2 From the File menu, choose Clone Teacher, then click Yes. A dialog for the cloned teacher appears.

3 In the Personal tab, change Employee Number and Teacher Number. We recommend you add a letter to the number to indicate a cloned teacher.

4 You can change the teacher Name. We recommend you add a number or letter to the name.

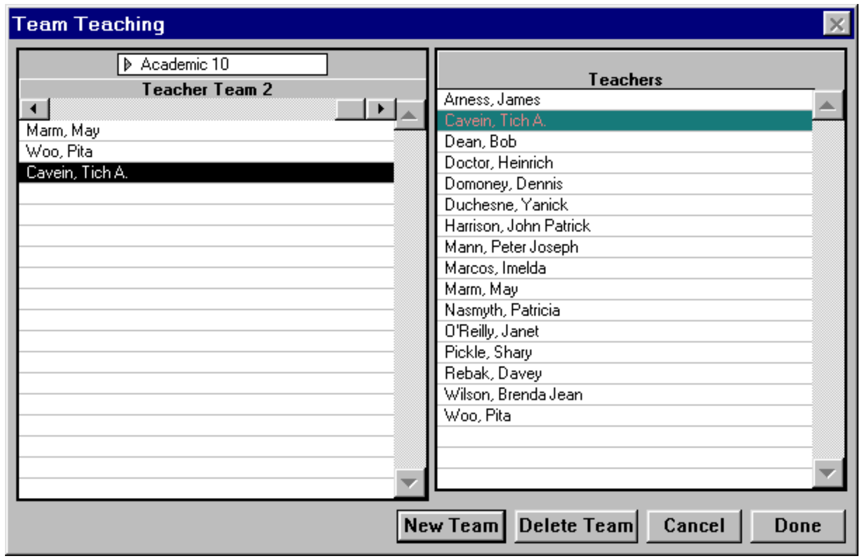
The actual teacher name is displayed in the “Teacher is Clone of” field. In Scheduler, you will see both the actual and cloned names, but only the actual name will print on timetables and reports.

5 Click the Scheduler tab, then set up the Courses and Rooms for the cloned teacher. See “Scheduler Tab” on page 39.

6 Click Done.

Setting Up Team Teaching

Create any number of teaching teams, and include a teacher on any number of teams. Teaching teams are groups of teachers that teach clustered students. Scheduler uses teaching teams to schedule classes that use student clusters.



To set up a new team:

1. In the Teachers view of the Main window, choose Team Teaching from the Details menu.
2. If you are setting up the first team, in the Teachers list, double-click all the teachers belonging to the team.

   If the left side displays names, click the horizontal scroll bar to see each team.

   If you are setting up other teams, click New Team, then repeat this procedure.
3. From the popup menu in the upper left corner, select the program or grade that this team will teach.

Entering Student Details

Overview

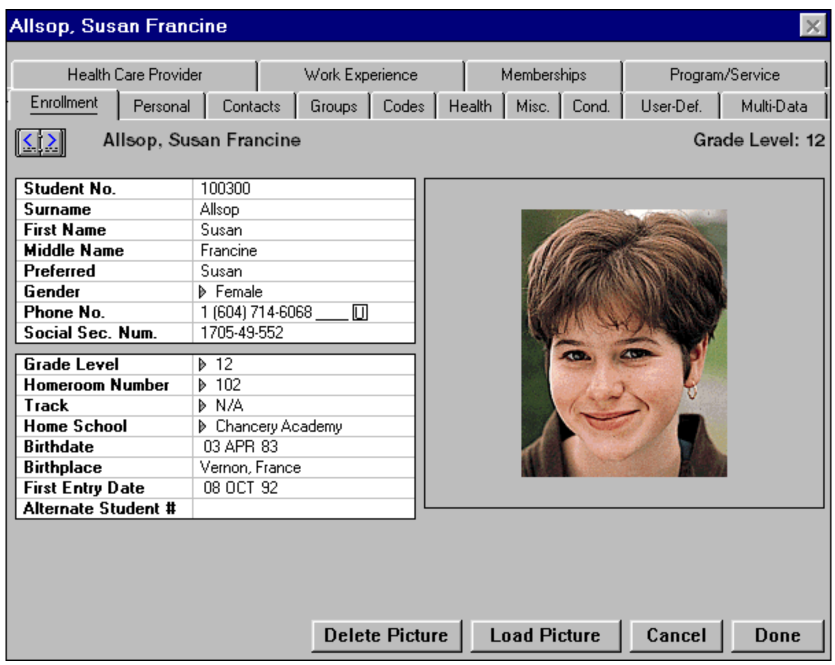
All schools must enter student records in Details.

The Enrollment, Personal, and Groups tabs display some of the same information. If entered in 1 tab, shared information automatically appears in the other tabs.

You must enter the surname and student number before you save student information.

Enrollment Tab

This tab contains information about the student's enrollment in the school. Student pictures can be included, but are optional.



Student No.

Also appears in the Personal tab. Student numbers must be unique. The first unused number that is higher than the last number entered is automatically entered. You can change this number.

Student numbers are defined in School Setup as numeric, alphabetic, or alphanumeric.

Surname, First Name, Middle Name, Preferred

Also appears in the Personal tab. Leave the Preferred name blank if the student uses his or her first name.

Phone No.

Also appears in the Personal tab. Type the home phone number. Area code and extension numbers are optional.

Click the letter following the phone number and type L or U for listed or unlisted.

Grade Level

Also appears in the Personal tab. Scheduler uses Grades and programs to determine which courses are required for each student and which courses should be requested for each student by Assign Requests. In both cases, a match in the student and course's program and grade is required.

Scheduler uses grades and programs to generate course requests automatically.

Homeroom Number

Also appears in the Personal tab. Homerooms can also be assigned in Scheduler.

The homeroom number is independent of any Homeroom course you schedule. If you need to schedule a homeroom course in Scheduler, assign homerooms first. Then, in Scheduler, use those homeroom lists to multi-paste students into their homeroom classes.

You can sort students by Homeroom in Details or for taking daily attendance in the Attendance module.

Track

Also appears in the Groups tab. Choose a track if your school is year-round or uses the Track for another purpose. Most year-round schools make an effort to place siblings in the same track, to accommodate family holidays. Students can be sorted by track.

Home School

Also appears in the Personal tab. For students from other schools who attend your school part-time, select the home school for the student. Schools in this list are entered in School Setup, in the School Names menu. Students can be sorted by School Name in the Main window of Details.

First Entry Date

Also appears in the Personal tab. Type the date the student registered, the date the student record was first entered, or the date the student first attended your school.

Alternate Student

Optional. Also appears in the Personal tab. If your district, state, or province has a number for your student, in addition to the automatic Win School Student No., type it here.

Loading Student Pictures

Win School stores and displays student pictures. Use a digitizer or scanner to record pictures as bitmap files (ending with .bmp) and load them into Win School.

Pictures are loaded and replaced in the same way. If there is an existing picture, the new picture automatically replaces it.

Picture Unavailable is displayed in the picture window if no picture has been loaded for a student.

When you create picture files, store them in one folder, and save each picture file as the student ID number to make sorting easy.

There are 3 ways to load pictures into Win School: using a command, using drag and drop, or using a control file.

To load a single picture:

1. In the student's Enrollment tab, click Load Picture.
2. In the dialog that appears, highlight the name of the .bmp file containing the student's picture, then click OK.

To load student pictures using drag and drop:

1. Sort your students in the same sort order as your student pictures.
2. Open the folder where the student picture files are stored. If necessary, sort these files to match the student sort order in Details.
3. Open the first student record in Details, and click the Enrollment tab.
4. Position the Details window so you can see both the student picture area in the Enrollment tab and the folder with student picture filenames.
5. Drag and drop a picture file onto the student picture area in the Enrollment tab.
6. Press F4 or click the right arrow button at the top left of the window to select the next student and repeat the process.

To load a batch of student pictures using a control file:

1. Create a text file using a text editor such as WordPad.
2. Each student must be on 1 line. Each line must have 2 fields enclosed by double quotation marks and separated by a comma.

   The first field is the student number. The second field is the student's picture file name. Press Enter to create a line.

   For example:

   ```
   "114407","114407.bmp"
   "171951","171951.bmp"
   "328573","328573.bmp"
   "9299","9299.bmp"
   "111644","111644.bmp"
   ```
3. Save the control file as a text file in the same folder as the picture files.
4. From the File menu in the Details Main window, choose Load Pictures, then click OK to confirm loading pictures.
5. In the Student Picture Import Control File dialog, highlight your control file, then click OK.
6. Check the result of your import in the Student Pictures Import window. If necessary, correct any errors and re-import the batch or import those pictures individually.

Personal Tab

The Personal tab contains basic information about a student, including home address, anticipated graduation year, and schools previously attended.

The address format depends on what you selected in School Setup, Student Address Format menu. The format will be either 2 or 5 address lines.

Student No.

Also appears in the Enrollment tab. Student numbers must be unique. The first unused number that is higher than the last number entered is automatically entered. You can change this number.

You set up student numbers the Student Numbers menu in School Setup, as numeric, alphabetic, or alphanumeric.

Surname, First Name, Middle Name, Preferred

Also appears in the Enrollment tab. Leave the Preferred name blank if the student uses his or her first name.

Phone No.

Also appears in the Enrollment tab. Type the home phone number. Area code and extension numbers are optional.

Click the letter following the phone number and type L or U for listed or unlisted.

Physical Address/Mailing Address

Use the VCR buttons to toggle between the address where the student is living and the address to which mail should be sent.

If both addresses are the same, enter a Physical Address only.

Address 1, Address 2, City, State, Zip Code

For 2 Address Lines format.

Address 1 and Address 2: type street address (number, street name, and, if applicable, apartment number, post office box or rural route number).

Choose the city and state. Type the zip code. Students can be sorted by zip code.

Phys Addr Num, Phys Addr Street, Phys Addr Type, Phys Addr Dir, Phys Addr Apt., City, State, Zip Code

For 5 Address Fields format.

Type street number, street name, and, if applicable, apartment number. Choose address type, address direction, city, and state.

Type the zip code. Students can be sorted by zip code.

Area, County

Optional. Students can be sorted by Area.

Grade Level

Also appears in the Enrollment tab. Grades and programs are used by Scheduler when determining which courses are required for each student and which courses should be requested for each student by Assign Requests. In both cases, a match in the student and course’s program and grade is required.

Scheduler uses grades and programs to automatically generate course requests.

Homeroom Number

Homerooms can also be assigned in Scheduler.

The homeroom number is independent of any Homeroom course you might schedule.

You can sort students by Homeroom in Details, or in the Attendance module for taking daily attendance.

Family No. and Family Unit

Optional. Use these fields if you group siblings by family. Give each family a unique number. Unit letters allow you to create sub-divisions within separated families. Give each household a different letter.

Some schools assign meanings to the Unit letters. For example, A means living with both parents, B means living with mother and/or her new spouse, C means living with father and/or his new spouse, D means living in foster home, and so on.

If the contact is not part of the immediate family, give the contact a unique family number or a special number, such as 0 or 999, that is reserved for contacts not related to any students in the school.

This information can be used for mailings.

First Entry Date

Type the date the student registered, the date the student record was first entered, or the date the student first attended your school. For reporting purposes only.

Alternate Student

Optional. Also appears in the Enrollment tab. If your district, state, or province has a number for your student, in addition to the automatic Win School Student No., type it here.

Extended Info 1, Extended Info 2, Comments, Activities

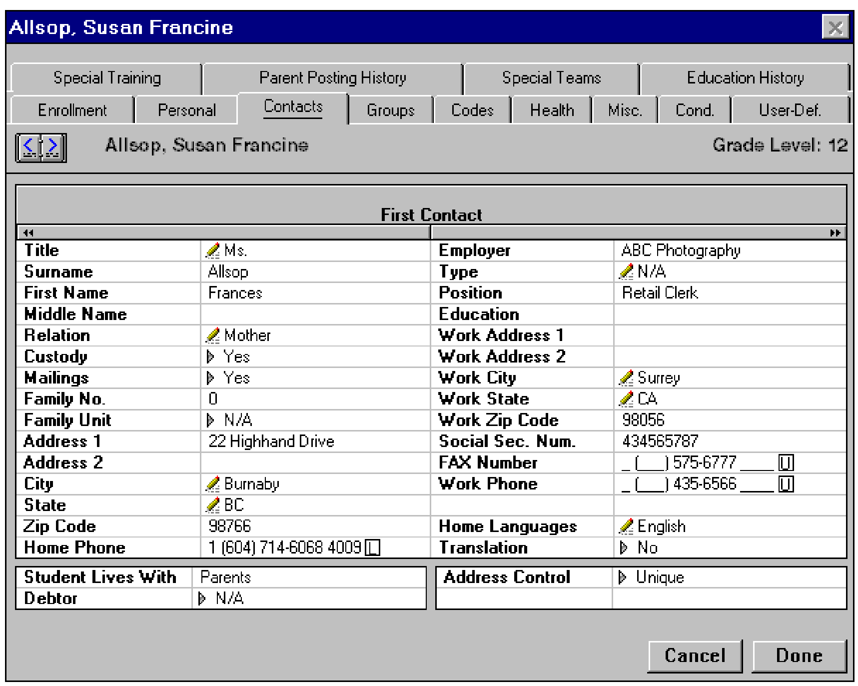
Click the VCR buttons for 4 sets of information:

Grad Year	Optional. Type the year that the student is expected to graduate.
Grad School	Optional. Choose the school from which the student will probably graduate.
Field Trip Perm	Optional. Indicate if the parents have signed a general release to allow this student to attend field trips.

Birth Cert.	Optional. Indicate if school staff have verified birth certificate information.
Home School	For students from other schools attending your school part-time, select their permanent school. Schools in this list are entered in the School Names menu in School Setup. Students can be sorted by School Name in the Main window of Details.
Original Name	Optional. If the student name has changed, type the original name.
TAG Date	Optional. Type the date the student was identified as Talented and Gifted.
TAG School	Optional. Select the school that first identified the student as Talented and Gifted.
Comments	Optional. Scrolling text field to type comments about the student.
Activities	Optional. Scrolling text field to describe student activities.

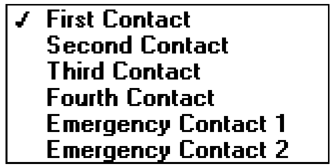
Contacts Tab

Type up to 6 contacts for the student. This information is for the Query module and reporting purposes only. Built-in reports in the Attendance module include only Contacts 1 and 2.



Specific contacts can be reserved for specific information. For example, the mother can always be the First Contact and father can always be the Second Contact.

The VCR buttons at the top of the tab control which contact information is displayed. A checkmark identifies the information currently displayed.



The Student Lives With and Debtor fields at the bottom of the tab are for the student and remain unchanged for each contact.

Address Control

At the bottom of the Contacts tab, select address control for each contact.

A contact address can be unique, or it can be copied from an existing address. The Address Control popup menu in the lower right corner of the tab controls the source of the address information for the currently-displayed contact.

The Address Control menu is different for each contact.

If a contact address is unique, all data fields are editable.

If the address is copied from another source, Address 1, Address 2, City, State, Zip Code, and Home Phone are not editable. The padlock to the left of those fields indicates that they are locked. When the source address is changed, these fields are updated automatically.

If you change Address Control to another source, the content of address fields changes to the new source address. If you change to Unique, the data remains unchanged, but it becomes editable. If you change from Unique to a source, the content of the address fields is replaced by the source data.

Student Lives With

Optional. Type up to 21 characters for the person with whom the student lives. This information is for reporting purposes only and is not correlated to Family Numbers or Unit letters.

Debtor

Select the contact to be billed for expenses incurred by this student.

Family No. and Family Unit

Optional. To group siblings by family.

Give each family a unique number. Unit letters allow you to create sub-divisions within separated families. Give each household a different letter.

Some schools assign meanings to the Unit letters. For example, A means living with both parents, B means living with mother and/or her new spouse, C means living with father and/or his new spouse, D means living in foster home, and so on.

If the contact is not part of the immediate family, give the contact a unique family number or a special number (such as 0 or 999) that is reserved for contacts not related to any students in the school.

This information can be used for mailings.

Address 1, Address 2, City, State, Zip Code and Home Phone

If Unique is selected in the Address Control menu, these fields are editable. Type the contact street address and home phone number. If Unique is not selected, these fields are not editable, and a padlock appears to the left of each of these fields to indicate that they are locked.

Employer, Education, and Translation

Type the contact's employer, highest level of education, and whether a translator is necessary to communicate with this contact.

Groups Tab

This tab contains information about groups to which the student belongs, the user-defined lists, and the student counselor and program fields.

Normal Program

Choose the normal program for the student, if applicable. The normal program for this student is used by Scheduler to determine the courses required for the student and the number of credits required by the student program.

Special Program

Choose the special program for the student, if applicable. Special Program is used by Scheduler to determine the courses required for the student, and by Assign Required to assign requests.

Ethnic Categories, Home Languages, Lunch Status, User Defined Lists

Choose the applicable information for the student in each of these popup menus. Titles of these lists can be changed in School Setup.

Students can be viewed by Ethnic Category in the Main window and sorted by Ethnic Categories in the Sort dialog.

Track

Choose a track if your school is a year-round school or uses Track for another purpose. Most year-round schools make an effort to place siblings on the same track to accommodate family holidays. Students can be sorted by track.

Groups and Their Dates

Record the groups this student does or did belong to.

If another user is editing this student's group, a padlock icon appears in the Groups tab until that user closes.

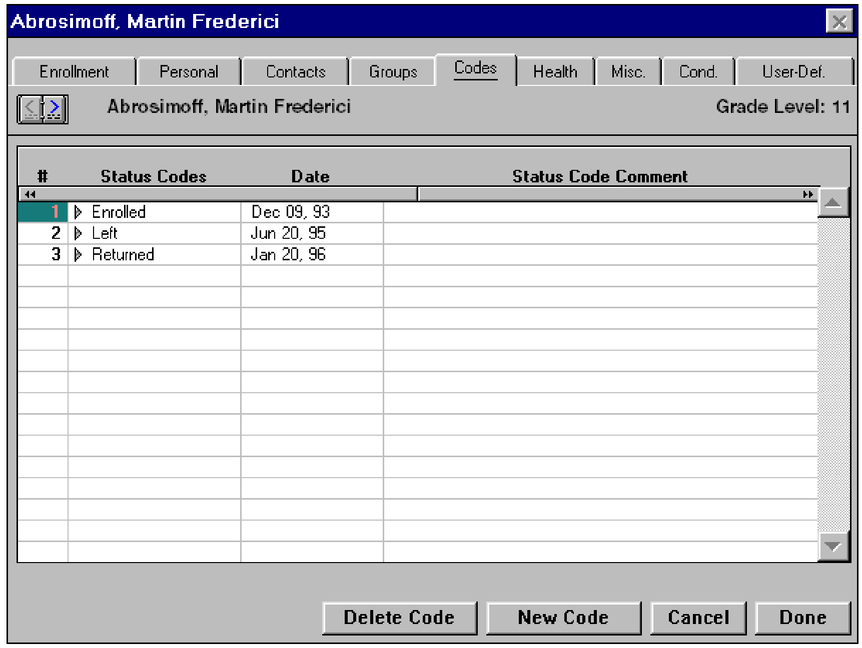
Attendance can display students by group to allow you to enter data or print reports for all group members at once.

To record group membership for this student:

1. Click New Group. A new group appears at the end of the list.
2. Choose the group name from the popup menu, then type the start and end date of the student's membership in that group.
3. To enter N/A as a date, highlight the month and press Backspace.
4. To delete a group, highlight the group name, then click Delete Group.

Codes Tab

Use this tab to record student status codes, which track student registrations in and withdrawals from your school. Status codes are needed to accurately track attendance. This tab also stores user-defined codes for reporting purposes only. Use the VCR buttons to display Status Codes or User Defined Codes.



Status Codes

You create status codes in School Setup and use them to track student enrollment status by recording school entry, withdrawal, and re-entry. An Active student is currently enrolled in the school. An Inactive student is not currently enrolled; either the student has withdrawn or the student entry date has not yet arrived.

The first status code is the first Entry code for this student. If the student status changes, record that change as a new status code.

Before year end, give graduating students a Withdrawal status code to make them inactive. In student lists, the record will be in italics. Don’t delete graduated students in your current year database. Delete them in your next year database.

You can hide inactive students by choosing Hide Inactive Students from the Edit menu.

In the School menu in School Setup, the option you selected in the Withdrawal Inactive Day menu determines whether the students become inactive on the date of a Withdrawal code or on the day after the date of the Withdrawal code.

Students become active on the date of an Entry or Re-Entry code. The Re-Entry or Entry code date must be at least 1 day after the Withdrawal code date.

The Attendance module checks each current enrollment status to determine whether to set the student default daily attendance code to Present or Not Enrolled. If you change a student status code in Details, the student attendance codes are automatically updated in the Attendance module.

To create a Status Code:

1 Click New Code to add a new code to the end of the list.

2 From the popup menu, choose the status code.

3 Type the date the code takes effect and any comments you have.

Status code dates must be school days. If they are weekends, holidays, or days outside of your school terms, they are omitted from Attendance and state reports that show status codes.

User Defined Codes

Use these codes to track something such as student citizenship or at-risk status, where the student has only 1 status at a time. Set up User-defined Codes in School Setup, in the Student - User Defined menu.

Click the VCR buttons to display other user-defined codes.

To enter a new User Defined Code:

1 Click New Code. A new code is added to the end of the list.

2 Choose the user-defined code from the popup menu.

3 Type the date the code takes effect and any comments you have.

User-defined code dates must be school days. If they are weekends, holidays, or days outside of your school terms, they are omitted from Attendance and state reports that show user-defined codes.

Health Tab

Use the Health tab to track student emergency information such as doctor name and phone number, medical conditions, or alerts.

Call Doctor and Call Ambulance

Indicate parental permission to call the doctor or ambulance directly and/or parental agreement to pay for any charges incurred by calling the doctor or ambulance.

Immunized

Useful for an inoculation campaign.

Choose No for all students, then as inoculation is administered, change to Yes.

Can treat

Indicate whether the parents have signed a waiver allowing the school to treat the student.

Medical Comments

Type any comments about the student's medical history that the school should know or be able to give to medical authorities. The field scrolls to allow large text entries.

Medical Alert

Type any medical information that the school should know or be able to give to medical authorities.

Miscellaneous Tab

Information on this tab is used by some state and provincial attendance reports.

User Defined Flags

Choose Yes or No for these flags which you defined in School Setup, Student - User Defined tab.

Transportation

Type transportation information in these fields which you defined in School Setup, Student - General, Transportation.

Legal Alert

Type any legal information. Some schools use this field for a password from parents to give to others who are sent to pick up a child.

Conduct Tab

Student conduct can be infractions that need disciplinary action or outstanding behavior that is rewarded. Information in this tab is for reporting purposes only with the exception of suspensions. Suspension information is passed to Attendance to be automatically recorded.

The Conduct tab has 2 views:

- The Summary view lists all the conduct records in chronological order.
- The Details view shows the details of 1 incident, including conduct comments. Use the horizontal scroll bar to see different incidents.

To enter a new conduct incident:

1 In either view of the tab, click New Conduct.

2 Add or edit conduct code information.

To delete a conduct incident:

1 Display the conduct record in the Details view of the tab or click it to select its number in the Summary view.

2 Click Delete Conduct.

Action, Action Dates

Choose the action taken in response to an incident, and type its start and finish dates. The default dates are N/A. To replace a date with N/A, highlight the month field and press Backspace.

Attendance requires start and end dates for suspensions. For a 1 day action, type the same date in both fields.

Print Conduct Report

A conduct report, which can be sent home to parents, can be printed from the Conduct Tab. Each report is complete with spaces for signatures and special comments, and allows for a message for parents.

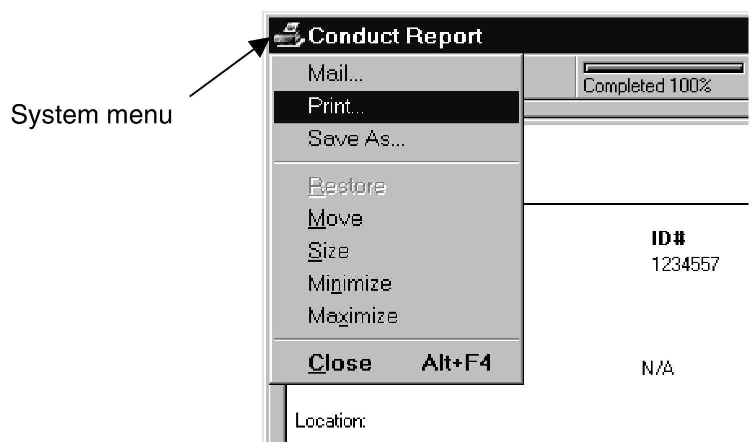
To print a conduct report:

1 Select the incident you want to print on this report.

2 Click Print.

3 Type your message (up to 255 characters) or leave blank. Click OK.

4 To send the report to the printer, choose Print from the System menu, which you access by clicking the icon to the left of the window title.



User-Def. Tab

All user-defined fields from the School Setup module appear in this tab. You cannot select or edit any field that is locked in School Setup. A padlock appears in the left of any locked field. Most text fields can contain 15 characters. Some fields can contain 49 characters.

Custom Tabs (Students)

Optional. The information in these tabs is only used for custom reports.

In addition to the data in the User-Defined tab, you can define up to 10 Custom tabs containing fields, codes, and lists.

Custom tabs appear in their own row. Only the defined tabs appear.

The default access level for Custom tabs is None for all users other than the Administrator. Assign access levels in School Setup, Passwords menu.

To define Custom tabs, use the Custom Tab Designer in the Tabs menu in School Setup.

Multi-Data Tab (Students)

Optional. The information in this tab is used only for custom reports.

In addition to User-Defined and Custom tabs, you can define a Multi-Data tab containing fields, codes, and lists.

You can define up to 5 titles or headings for the Multi-Data tab. Use the VCR buttons to switch headings. Only the defined headings appear.

The default access level for Multi-Data tabs is None for all users other than the Administrator. Assign access levels in School Setup, Passwords menu.

To define the Multi-Data tab, use the Multi-Data Tab Designer in the Tabs menu in School Setup.

Entering Resources Details

Overview

Use Resources Details to track course resources, such as the books or special materials needed for a course, and their costs.

Create items for the popup lists in the Resource Types dialog in School Setup Details Lists menu.

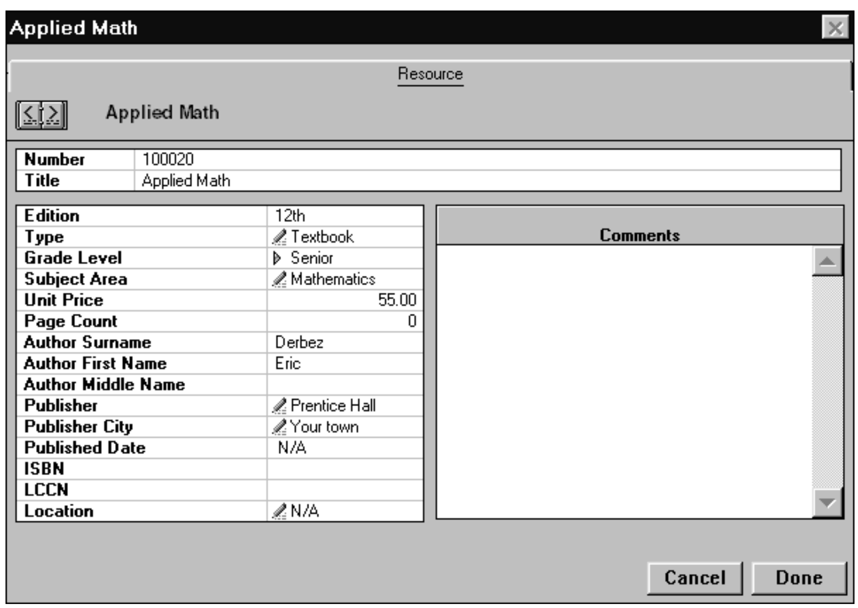
After you set up resources in the Resources view in Details, you can assign resources to each course in Course Details in the Lists tab.

You can create booklists for courses or for individual students in Report Manager.

Enter up to 20 resources per course, to a maximum of 1000 resources in your database.

Resource Tab

Enter all of the resources used at your school that you want to track in Win School.



Number

Type a reference number for the resource.

Title

Required. Type a resource title. Titles should be unique.

Edition

Type the edition number of the resource.

Type

Choose a type of resource. Create the list in the Resource Types dialog in School Setup Details Lists menu.

Grade Level

Choose the grade level for which this resource will be used.

Subject Area

Choose a subject area.

Unit Price

Type the unit price of the resource.

Page Count

Optional. Type the number of pages for a book or some other amount indicating size of the resource.

Author

Type the resource's author in the format: surname, middle name, first name.

Publisher

Choose a publisher name. Create the list in the Publishers dialog in School Setup Details Lists menu.

Publisher City

Choose the city in which the resource was published.

Publisher Date

Type the date of publication.

ISBN

Optional. Type the International Standard Book Number.

LCCN

Optional. Type Library of Congress Cataloging Number.

Location

Choose the location where this resource is available. Create items for the popup list in the Resource Locations dialog in School Setup Details Lists.

Comments

Type comments about the resource.

Working With Reports

Overview

From the Details Main window, you can customize and print 3 built-in reports, and develop your own custom reports.

Printing Reports on Paper

Choose a report from the Reports menu, specify what you want in the report, then click Print. The report is displayed in a window.

To send the report to the printer:

- From the System menu, choose Print.

  The System menu is the icon to the left of the window title.

Course Selected Items Report

The Course Selected Items report prints selected information about selected courses.

Print and review this report before using the Scheduler module, to make sure that your data is entered correctly.

To print the report:

1. Choose courses in the Courses Main window.
2. From the Reports menu, choose Course Selected Items.
3. In the dialog that appears, select the fields you want to print on the report. Click Print.

Student Conduct Report

Use this report to track conduct trends. Some of the reports you can print are:

- A complete report for individual students.
- All conduct incidents handled by a particular staff member.
- All suspensions, or any infraction or action, within a date range.

- All students with more than a minimum number of suspensions, or any other infraction or infraction action.
- All students with a particular infraction.

To print the report:

1 Choose students in the Students view of the Main window.

2 From the Reports menu, choose Student Conduct.

3 Select options.

Select Summary Only if you want only a summary of the selected incidents.

4 Click Print to display the report.

5 To send the report to the printer, choose Print from the System menu, which you access by clicking the icon left of the window title.

Homeroom Roster Report

Use this report to see if students and teachers are correctly assigned to homerooms, and to list students by their homerooms.

The report lists the students in selected homerooms, with space for teachers to record attendance, marks, or any other information.

Each homeroom is printed on a separate page. Within each homeroom, students appear in the order defined in the Sort dialog.

To print the report:

1 In the Students view of the Main window, choose Homeroom Roster from the Reports menu.

2 Select the homerooms you want listed.

3 Choose the Report Format you want by clicking an image.

4 Choose from Items to Print. Select Student name or Student number to make the Print button active.

5 Click Print to display the report.

6 To send the report to the printer, choose Print from the System menu, which you access by clicking the icon left of the window title.

Student Transfers Report

This report lists the dates of selected students’ transfers between normal programs, homerooms, grades, and tracks.

All transfers for a student print together. To print a separate page for each type of transfer, print from the Transfer Editor dialog. See “Recording Transfers in Student Records” on page 19.

To print the report:

1. Choose students in the Students view of the Main window.
2. From the Reports menu, choose Student Transfers.

Custom Templates

Print reports using custom templates created in Report Manager.

Use this option if you have Report Manager templates available for Details. Use custom templates to report on information from other modules, or information not included in one of the predefined reports.

To print the report:

1. If required for the report, select the students, teachers, or courses needed in the Main window.
2. From the Reports menu, choose Custom Templates.
3. Choose a template. The list is empty if no templates are available for Details.
4. If you want to use the Filters dialog to constrain the report, choose Use Report Options.
5. Click Print.

   If the Filters dialog opens, choose the filters for the report and click Print to display the report. For more information on filters, see the Report Manager Guide.
6. To send the report to the printer, choose Print from the System menu, which you access by clicking the icon left of the window title.

Troubleshooting

Can’t move a student from the archive file back into my database

Not available yet. We recommend that you keep withdrawn students in your active database for a year or more, so that they are available if you need to reactivate them.

Can’t select popup list item with mouse

If you are running MS-Office 4.2 or HP Jet Direct in the background, you might encounter this problem.

Exit MS-Office or HP Jet Direct, or use the keyboard to make your selection. For example: in Select/Replace/Assign, to change the Bin to Bin 4, click the popup list and type 4 rather than using your mouse.

Changing Information

Can’t add a new course in Course Details

Ask the System Administrator to set the Access Level to Edit for Resources in Course Details. In School Setup, Passwords, System Passwords, change the Access Level to Edit for Details - Resources for user IDs that have edit access to Course Details.

The Main Student window doesn’t show homeroom change but Enrollment tab does

In School Setup, Transfer Recording is on. Changes to student homeroom, grade level, normal program, and track will take effect the following day.

To make the change immediately:

1. In Student Details, highlight a student and choose Transfer Editor from the Edit menu.
2. Change the date of the transfer to the previous day’s date.

Can’t Change Course Information

If you are unable to change course information in the Periods or Scheduler tab, the course is already scheduled or has sections already scheduled.

Before this information can be changed in Course Details, remove scheduling for the classes and delete all the sections.

If you remove a student from a section, all the marks for the student in that class might be deleted.

To remove a class from the school timetable, and delete sections:

1 Open the Scheduler module.

2 From the Windows menu, choose School Timetable.

3 Double-click the class in the Class Name section.

4 Highlight the sections in the Class Timetable at the bottom of the screen, then press Delete.

5 Return to Details and change the course information.

Can’t Sort Students After Changing Student Grade Levels

In most cases, nothing is wrong. Win School was designed to ensure that attendance data remains correct. Any changes made to student information using Select/Replace/Assign are not registered until the following day. This safeguard is to ensure the student does not receive attendance for both homerooms.

Deleting

Deleting courses

If you receive the message: “Some records weren’t deleted because they had other references or were currently locked by another user,” it means this course has been assigned somewhere in the program. Remove the course from Linked Groups, Teacher Preferences, School Timetable, Set Sections window, and Student Request files.

Deleting student records

If you receive the message: “Some records weren’t deleted because they had other references or were currently locked by another user,” it means a student has course requests and/or timetables in Scheduler. As you cannot delete student records which have requests or timetables, first delete those, then delete the student record.

To delete student requests and timetables:

1 In Scheduler, select student record(s).

Use Set Preferences in the Edit menu to Show Inactive Students if you want to select their records. This is different from “Hide Inactive Students” in the Edit menu in Details.

2 From the Schedule menu, choose Change Student.

3 In the Change Student dialog, select Clear Requests, Clear Alternates, or Clear Timetables.

4 Click Perform.

Linked Groups and Following Triplets disappear after entry

Either a flag, a following triplet, or linked group has been changed.

If the “All sections in the same block” flag on a course has been changed, change the flag back to its original value. This procedure ensures classes show in Linked Groups and Following Triplets.

To change the All sections in the same block flag:

1 In the Courses view of the Main window, double-click the course name.

2 Click the Periods tab and change the “All sections in the same block” flag to its original value.

3 Click Done.

If a course belonging to a Linked Group or Following Triplets has been deleted, re-enter Linked Groups and Following Triplets. To avoid this problem, do not delete a course belonging to a Linked Group or Following Triplet.

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