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Guide

# Getting Started

Win School®  
Version 4.2

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# Welcome

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Welcome to Win School<sup>®</sup> Getting Started Guide.

Win School is a complete student information system for schools. Designed by Chancery Software, Win School has both power and flexibility. Using Win School, large and small schools can perform their administrative and data-entry tasks quickly and efficiently throughout the school year.

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## Why Read This Guide

The purpose of this guide is to give first-time users—whether principals, vice-principals, secretaries, counselors, or teachers—the knowledge to use this software with confidence.

New software can be intimidating when first starting out. This guide describes how Win School works and suggests ways to implement the software. It also describes basic operating conventions that all staff will need to know to operate the software successfully.

Win School is a system with great flexibility. Schools have the choice of many options to choose from when getting started. Knowing how Win School works helps schools to:

- customize the software to their needs
- determine which staff should use the software and when they should use it
- eliminate problems before they happen, or, when problems do occur, know where to look to find solutions quickly

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## Who Should Read This Guide

Getting Started with Win School lays the groundwork for using the software and understanding what's written in all other Win School guides.

All staff using Win School for the first time should read this guide.

**That includes:**

- principals
- vice-principals
- secretaries
- teachers
- clerks
- counselors

- administrators
- technical coordinators

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## Using Win School Guides

Win School documentation provides step-by-step instructions for tasks staff perform. In addition to the Getting Started guide, there are eight other Win School guides.

**They are:**

- System Administrator Guide
- School Setup Guide
- Details Guide
- Scheduler Guide
- Attendance Guide
- Report Manager Guide
- Report Cards Guide
- Marks Guide
- Universal Access and District Extract
- Scanning and ASCII Transfer

The next two sections describe the contents of the Win School guides.

### What's in This Guide

The following table describes what's in each chapter of the Getting Started guide.

<b>In the Getting Started Guide</b>	<b>This chapter</b>	<b>Describes</b>
No computing experience is required before reading these chapters.	The Big Picture	how Win School works and the software components it is made up of
	Using Win School over the School Year	the tasks, software, and staff involved in using Win School over one school year
	Implementation Strategies	3 strategies for a successful implementation
A basic understanding of your computer and the Microsoft® Windows™ environment is required before reading these chapters.	Reviewing Basics	operating features and window conventions specific to Win School
	Using Query	how to use Query, a view-only Win School module used by most staff
	Glossary	terms specific to Win School

## Other Win School Guides

Staff can find detailed information about how to do specific tasks in the following guides:

To do this	Refer to this Win School Guide
install and set up Win School	System Administrator Guide
set up for the first time	School Setup Guide
enter course, teacher, and student information	Details Guide
build school and student schedules	Scheduler Guide Before reading this guide, you should be familiar with the Getting Started, School Setup, and Details user guides.
enter and track attendance	Attendance Guide
generate report cards	Report Cards Guide
track student marks	Marks Guide
view student, teacher, class, scheduling, and student marks information	Getting Started Guide
create custom reports	Report Manager Guide Before reading this guide, you should be familiar with all other Win School guides.
generate state or provincial reports	State or Provincial Reports Guide
scan data	Scanning and ASCII Transfer Guide
transfer ASCII files	Scanning and ASCII Transfer Guide
prepare for next year	System Administrator Guide
use the Win School Server	System Administrator Guide

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## Getting Help

**In addition to this guide, you can consult the following sources:**

- online help
- update notes
- other Win School reference guides
- Chancery’s Technical Support staff

## Online Help

Win School uses Microsoft® Windows™ Help which has a variety of features to make information easy to find. Use online help for quick reminders on what a feature is and how to use it.

**To find out how to use Windows Help**

- From the Help menu, choose How To Use Help.

**To access the Contents for the Win School Help**

- From the Help menu, choose Contents.

OR

If Help is open, click the Contents button.

**To access context-sensitive help for the dialog or window you have open on your screen (context-sensitive help is not available in all modules):**

- From the Help Menu choose, Help on Active Window.

OR

Press F1.

**Finding Information**

If you click any underlined text, the help will open a topic describing or relating to that text.

To find the most up-to-date information on new features or changes, open the What's New topic, or visit Chancery's support web site at <http://support.chancery.com>.

To open the search window where you can type keywords to help you locate a topic, click Search.

To open a list of terms pertaining to Win School or the module, click Glossary.

To print the topic currently open on your screen, from the File menu, choose Print Topic, and click OK in the dialog that appears.

**Update Notes**

As the software evolves, Chancery periodically releases upgraded versions of Win School. These releases come with update and installation notes that give useful information on new features, fixes, and changes to the software.

**Other Win School Reference Guides**

Use the individual Win School User Guides for detailed information about specific procedures, such as how to enter attendance or generate report cards.

Use the Win School System Administrator Guide for detailed information how to configure your system, and install and set up the software.

## Getting Technical Support

Chancery's support programs are available by subscription and include the below services

Technical Support	<p>solves problems and answers questions when software doesn't produce the expected results.</p> <p>Monday to Friday, 5 am to 5 pm Pacific Time phone: 1-800-688-9939 fax: 1-800-346-0643 email: techsupp@chancery.com website: <a href="http://support.chancery.com">http://support.chancery.com</a></p>
Web support	<p>Chancery's website includes a searchable knowledge base with frequently asked questions, tips, and troubleshooting, as well as support forums for users to share experience and knowledge. Web tutorials are available on an annual subscription basis.</p>
Software updates	<p>releases of new versions with improved functions and software fixes. Updates are provided free of charge for 3 months from your date of purchase and are included in the subscription to Chancery Support Programs.</p>

For more information on Technical Support Programs, call Chancery Customer Service at 1-800-999-9931 extension 130.

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## Providing Feedback

To improve the quality of your documentation, we would like your comments regarding this guide. Email comments to Chancery's User Education department at [user\\_docs@chancery.com](mailto:user_docs@chancery.com).

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## About Chancery Software

Chancery Software, a leader since 1985 in information management systems for schools and school districts, produces a wide range of products for both Macintosh® and Windows environments, including student, library, and district management systems.

Chancery products are used by over 8,500 schools in 11 countries, worldwide.

Chancery's head office is located in Vancouver, Canada.



# The Big Picture

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Understanding how Win School works makes getting started much easier.

This chapter describes the big picture—the components of Win School and how they are related.

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## What Is Win School

Win School is a powerful student information system for schools.

**Using Win School, staff can do these tasks:**

- enroll and withdraw students
- track and report student conduct
- enter attendance and print reports
- schedule school and students
- record and report academic progress
- print transcripts
- generate reports

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## How Win School Works

*Win School = modules + data*

The Win School student information system is made up of 2 main components: your Win School modules and your school data.

### Difference between Modules and Data

**Modules and data are two different things:**

- Modules are software programs, received from Chancery, that staff use to record school data and perform tasks, such as creating schedules or generating term reports.

Here's a list of all Win School modules, plus two special software applications\*:

School Setup	State/Province
Details	ASCII Transfer
Scheduler	Scanning
Attendance	Query
Report Cards	Report Manager
Marks	Utilities
*Shell	*Win School Server

Depending on what features are required, your school may or may not have purchased all Win School modules.

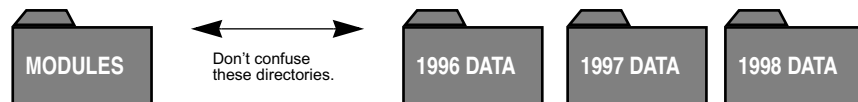
- Data is factual information, such as student names or courses numbers, that staff enter using the modules.

Modules are shipped to your school with no data. When staff start a module for the first time, no classes, courses, teachers, or students are displayed on your screen, unless schools opt to install Win School's sample data.

Schools enter data either manually or by importing data from another source, or some combination of the two.

### Module and Data Directories

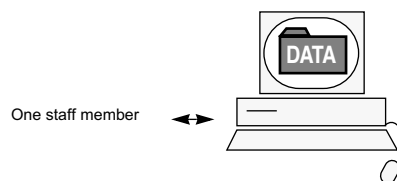
Modules and data are stored in different directories. When your school installs the software, Win School creates one directory for modules, and another one for data. Each year's data is stored in a separate data directory.



### Single-User and Multi-User

Your school will have purchased either the single-user or multi-user version of Win School. It's important to know what version you are running because it tells you who has access to Win School data, and how many modules can be running simultaneously.

In the single-user version, Win School runs on one computer that stores both the Win School data and modules. Only one staff member can access modules and data at a time. Depending on the amount of computer memory, several modules can be running simultaneously.



**In the multi-user version, Win School is installed on several computers:**

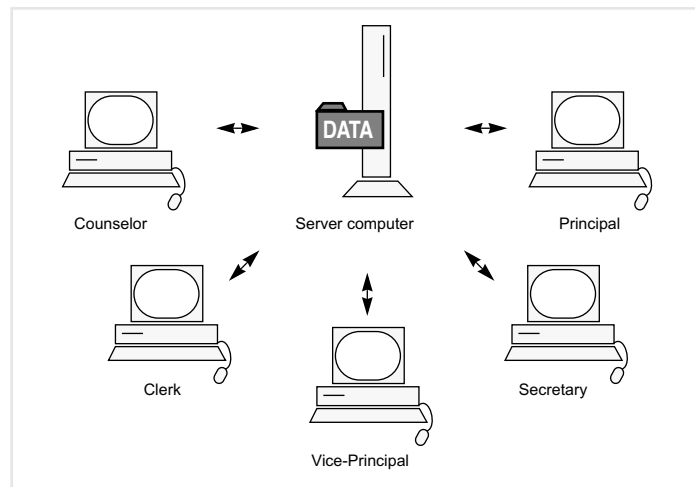
- the server computer

One computer, the server computer, stores data and distributes it to workstations.

- the workstation computers

Other computers, called workstations, run the Win School modules. One or more staff can access the Win School data at the same time from these workstations.

Workstations can be located anywhere in the school, such as the main office, the principal's or counselor's offices, or at a teacher's desk.



### How Modules and Data Relate

Completing tasks in Win School is much easier once staff know how modules and data work together.

**This section describes three concepts:**

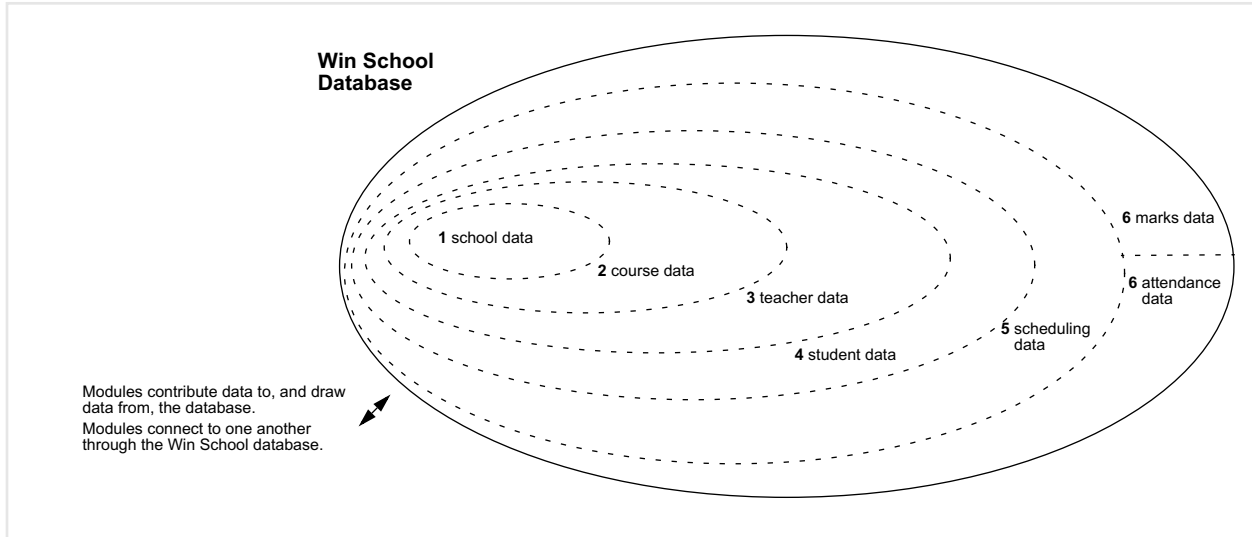
- how the database is organized
- how the modules access this data
- how this interaction affects day-to-day operations

### How Win School Data Is Organized

Win School database is a collection of all your school's data, including student, teacher, and course data; scheduling data; attendance and student marks data. The figure below shows a simplified view of your Win School database. Data is organized in a hierarchy, one layer building on another: first school data; then course, teacher, and student data; followed by scheduling, marks, and attendance data.

Modules, when calculating and performing other tasks, contribute data to and draw data from this database. One module builds on data previously entered by another module.

For example, the Scheduler module that staff use to schedule students, uses school, course, teacher, and student data, when generating student schedules. Scheduler, in turn, contributes scheduling data to the database for modules that need this data to record attendance and calculate student marks.



### Legend

Item	Description
1 to 6 school data	the order data is entered into the database when first setting up term dates, room types, course numbers, staff positions, attendance codes
course data	course name, grade, department, maximum size, course semester length
teacher data	teacher names, addresses, preferred courses and rooms
student data	student names, addresses, contacts, programs, student number
scheduling	classes, school and student schedules
attendance	daily, twice-daily, and period attendance
marks	student marks, earned credits, pass/fail status, class rank, GPAs

### How The Data Structure Affects Daily Tasks

- Data-entry time is reduced.  
Shared data only needs to be entered once; this saves data-entry time and file space. For example, student names used for scheduling are not re-entered when recording attendance.
- Setting up follows a particular order.  
When setting up for the first time, staff enter data in the order that reflects the database structure: first school data, then course data, and so on, as shown by the numbers 1 to 6 in the previous figure.
- Data is always up-do-date.

- Staff can access data from different modules and in different ways, with these consequences:

As staff update data using different modules, the data displayed on your screen changes. Conversely, your changes affect the data seen by other staff.

Solutions to problems occurring in one module might originate in another module with which it shares data.

In multi-user version of Win School, not all modules can be open at the same time.

### What's Next

The previous section describes your Win School database and how modules contribute data to and draw data from it.

The remaining sections in this chapter describe each of the modules in detail, starting with two special software applications, the Win School Shell and Server.

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## Special Win School Applications

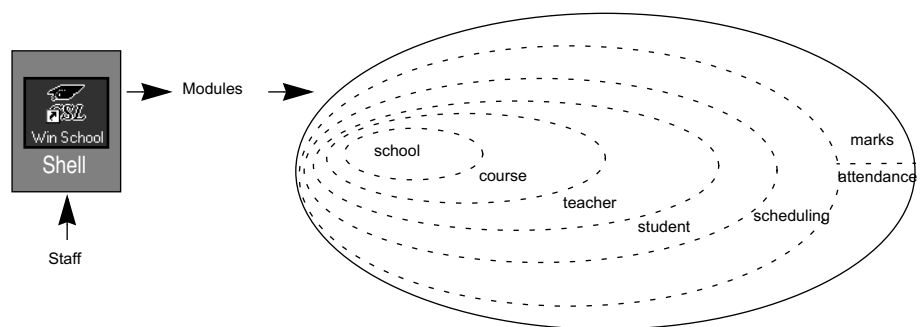
This guide begins its tour of Win School software by describing two special applications that enable modules and data to interact: the Win School Shell and the Win School Server.

### Shell

The Shell is your doorway to Win School and its database. It is the first application to open when Win School is launched, and the last to close when you exit the software.

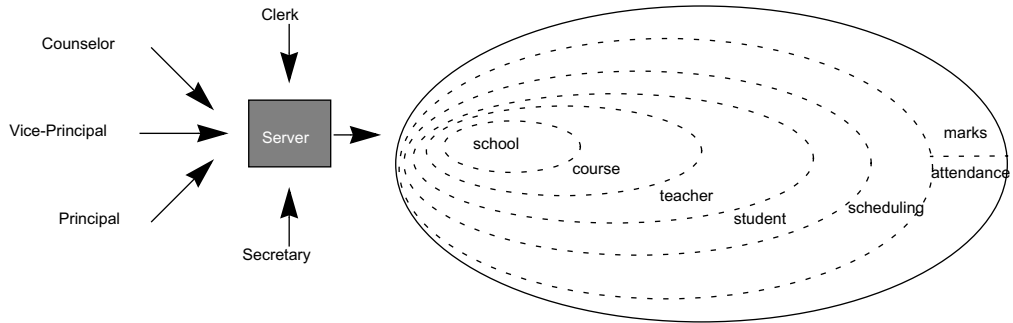
**The Shell serves several functions, including the following:**

- It controls access to data and modules. All modules are launched from the Shell. Requests to view or change data are administered here.
- It identifies your school. Embedded in the Shell are your school name, serial number, and authorization to use purchased modules.



## Server

The Server is used for multi-user versions of Win School only. It enables more than one staff member to access school data at the same time from different computers. Staff using this version of the software start Win School from the Shell, the same as the single-user version.




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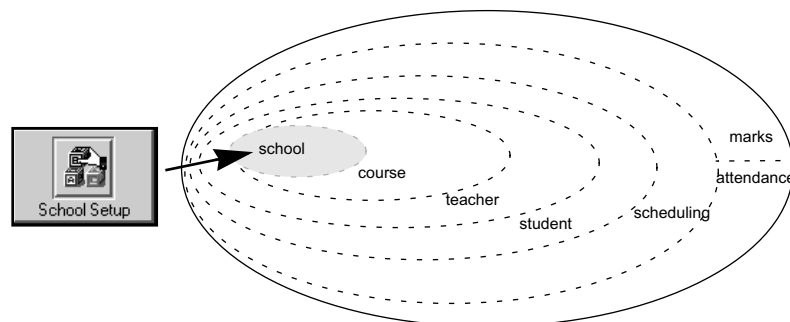
## Core Modules

Two modules, School Setup and Details, form the core of the Win School database. Information entered here is fundamental to how other modules operate.

### School Setup

Using School Setup, staff enter information that tells Win School what your school looks like and how it operates. A great deal of diverse information, such as term dates, passwords, and attendance codes, is entered here.

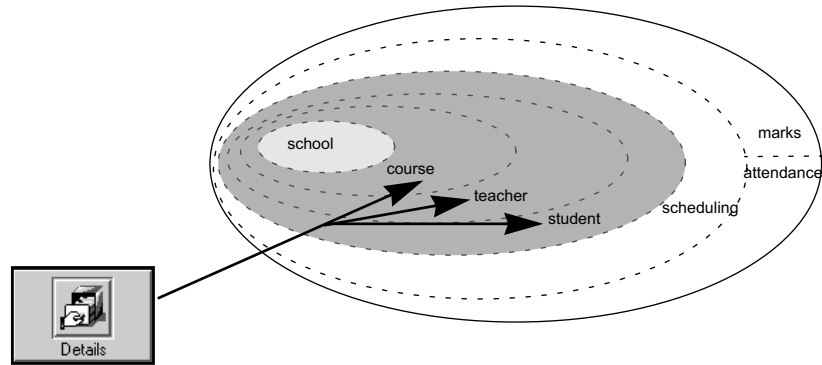
As its name implies, School Setup is the first module staff enter data into when setting up for the first time.



## Details

Details is a huge electronic file cabinet. Using it, staff enter detailed information about students, teachers, and courses. Staff enroll and withdraw students, and create and update teacher and course records.

To do its work, Details uses school data entered in School Setup.



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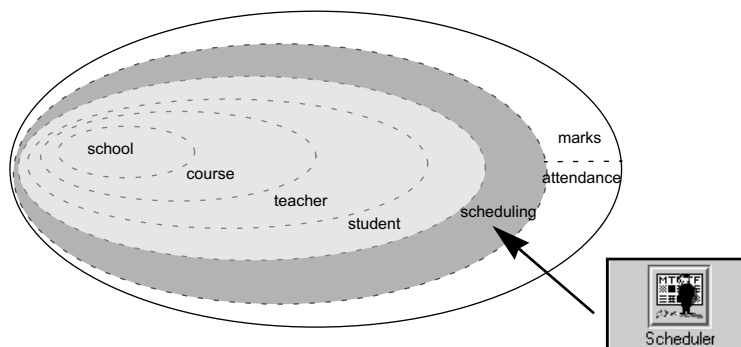
## Modules for Scheduling, Recording Attendance, and Tracking Student Marks

Four modules—Scheduler, Attendance, Report Cards, and Report Cards' companion, Marks—are the powerhouses of Win School. Using these modules, staff create school and student schedules, track attendance, generate term report cards and transcript information.

### Scheduler

Scheduler is a powerful module that builds and maintains both school schedules (who teaches what classes, at what time, and in which room) and student schedules, from course, teacher, student, and school data.

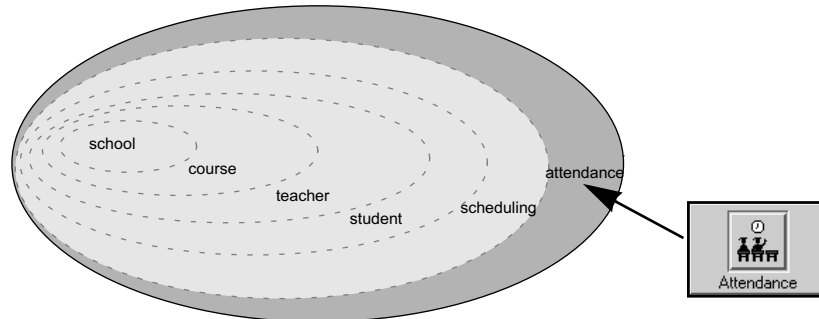
Using Scheduler, staff can generate over 30 built-in scheduling reports on students, classes, teachers, and rooms.



## Attendance

Attendance is an easy-to-use electronic attendance sheet where staff record or view daily and period attendance in a variety of formats. Using Attendance, staff can generate over 13 built-in reports on daily and monthly attendance statistics.

When tracking daily and period attendance, Attendance uses school, course, teacher, and student data. When tracking class attendance, Attendance also uses scheduling data.

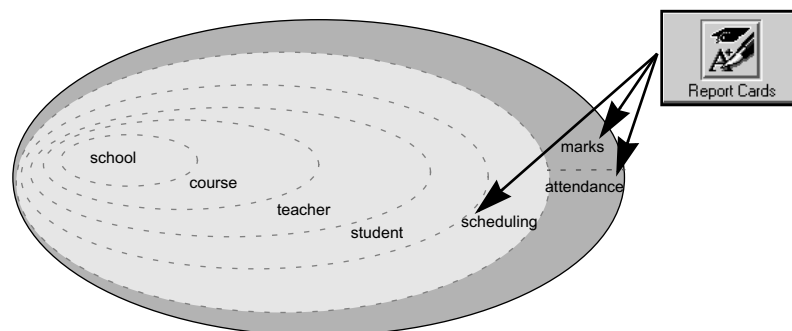


## Report Cards

Report Cards is a module with a tremendous amount of flexibility. Its primary function is to consolidate current report card data and maintain data for past years.

In Report Cards, staff enter or import students' marks and other data, such as teacher comments, work habit grades, and attendance totals. Report Cards calculates each student's term marks, cumulative GPAs and earned credits, class rank, and honor roll. In addition, staff can generate a wide range of reports, including report cards and student transcripts.

To do its tasks, Report Cards draws on school, course, teacher, and student data. Report Cards uses classes created in Scheduler. Or, in schools that don't use Scheduler, staff can schedule classes in Report Cards.

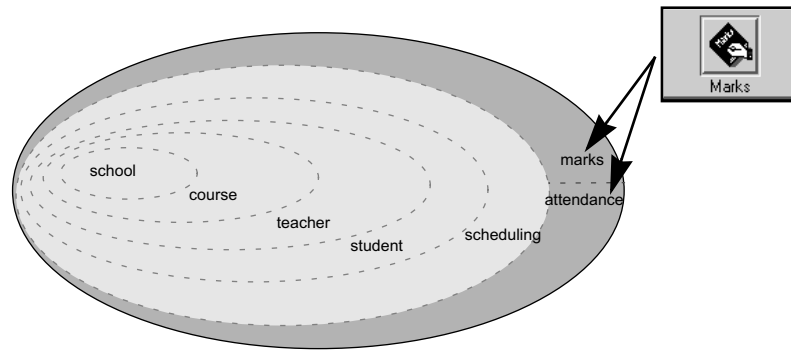


## Marks

Marks is an electronic “gradebook” program for teachers that runs from workstations at teachers’ desks or some central location, such as the staff room.

Teachers enter student scores. Then from school, course, teacher, student, and scheduling data, Marks calculates term marks, earned credits, and student and class averages for each class.

Marks can operate as a stand-alone product or with Win School. Marks with Win School connects to your school’s Win School database through the Report Cards module.



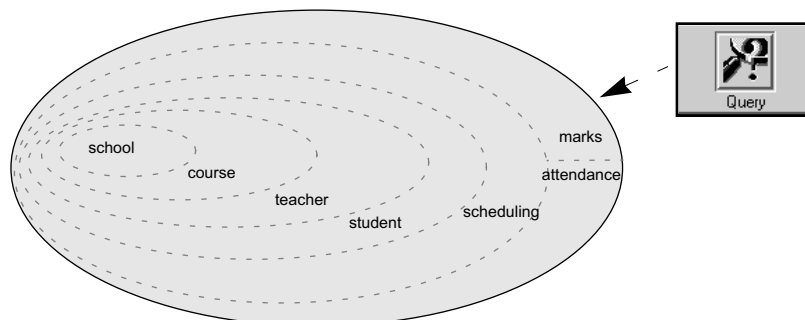
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## Modules for Viewing Only

### Query

Query, one of the most frequently used modules, is a window into your database. Using Query, staff can quickly access student, teacher, and class information. For example, staff can find a parent’s phone number, locate a student in a class, or view attendance records.

Query is a view-only module. This means staff can view information and print reports, but they cannot enter, change, or delete any data.



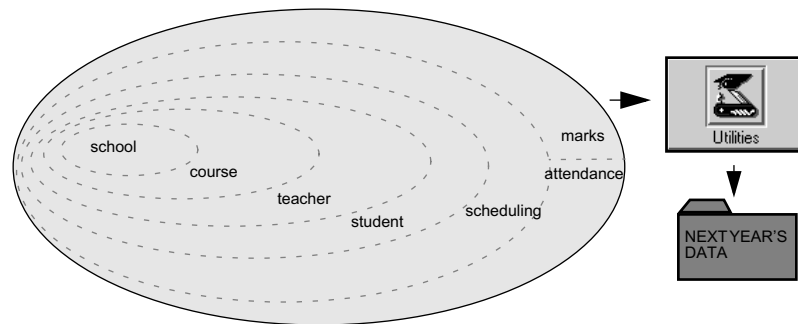
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## Modules for Year-End Administration

### Utilities

Utilities is a module that enables staff to process data for the next year. Utilities finalizes the current year's data, and merges data from the current year's database into next year's database.

Using Utilities, staff can generate trouble-shooting reports that pinpoint any problems in the year-end process.




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## Modules for Reporting Only

Many Win School modules can generate reports, in addition to their other functions. **Built-in reports** are ready-to-use reports that come with the software.

**Custom reports** are school-designed reports. They are generated from templates that staff create in Report Manager.

**Report creation is the primary function of the following two modules:**

- Report Manager
 

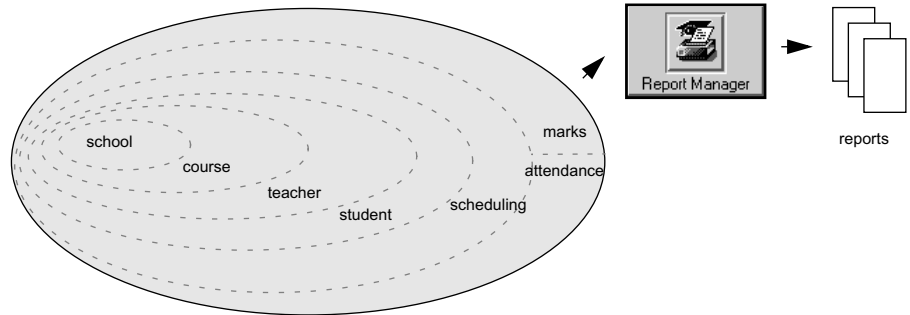
Staff create and run custom-designed reports. These reports can be shared between schools.
- State/Province
 

Staff run built-in reports whose specifications are defined by state or provincial departments of education.

## Report Manager

Using this module, staff can create custom reports, form letters, and mailing labels, when built-in ones are not suitable or available.

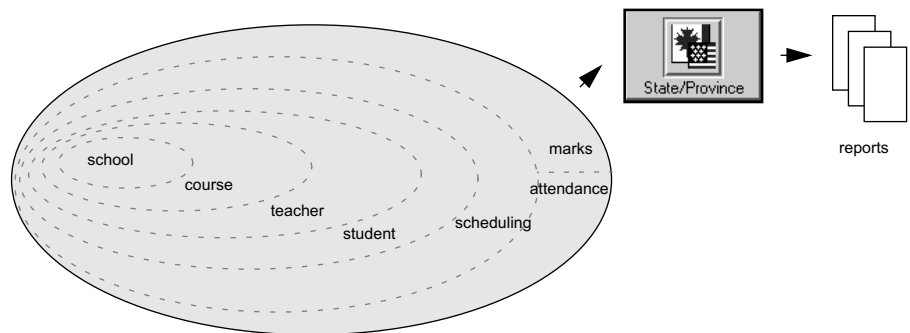
Staff create a template, specifying the data and format required. Report Manager generates the report from Win School data according to the template specifications. Schools can build a library of templates.



## State/Province

Using this module, staff can run built-in reports whose requirements are defined by U.S. or Canadian departments of education. Only the reports purchased by your school are available in this module. Contact Chancery for a list of existing reports.

Staff select their report and report options. State/Province generates the report from Win School data according to the specifications.



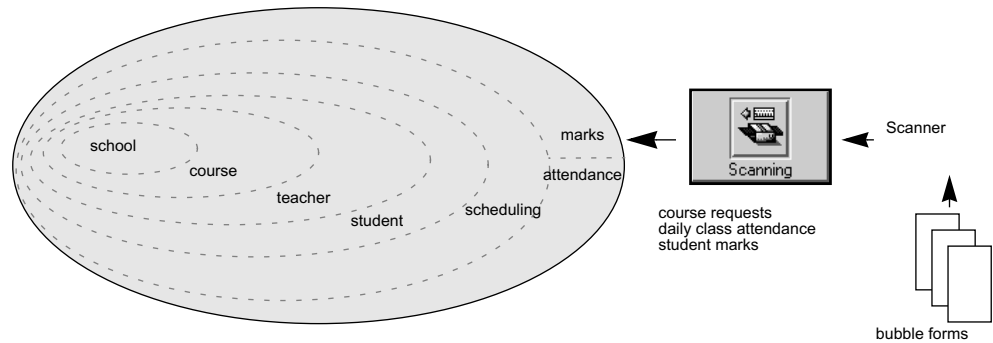
## Modules for Transferring Data Only

Two modules—Scanning and ASCII Transfer—are data-entry time savers. Their sole function is to transfer data between Win School and other sources.

### Scanning

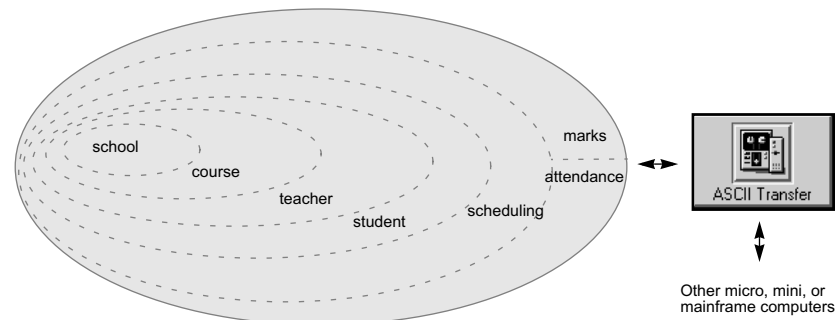
Using the Scanning module and optical scanners, staff can scan course requests, attendance, and term grades from commercial scanning forms (bubble forms) into the Win School database.

Staff create and hand out the bubble forms to teachers or students who mark the forms and return them to staff. Using a scanner machine, staff scan the information marked on the forms. Then the Scanning module uploads the data from the scanner machine into the Win School database.



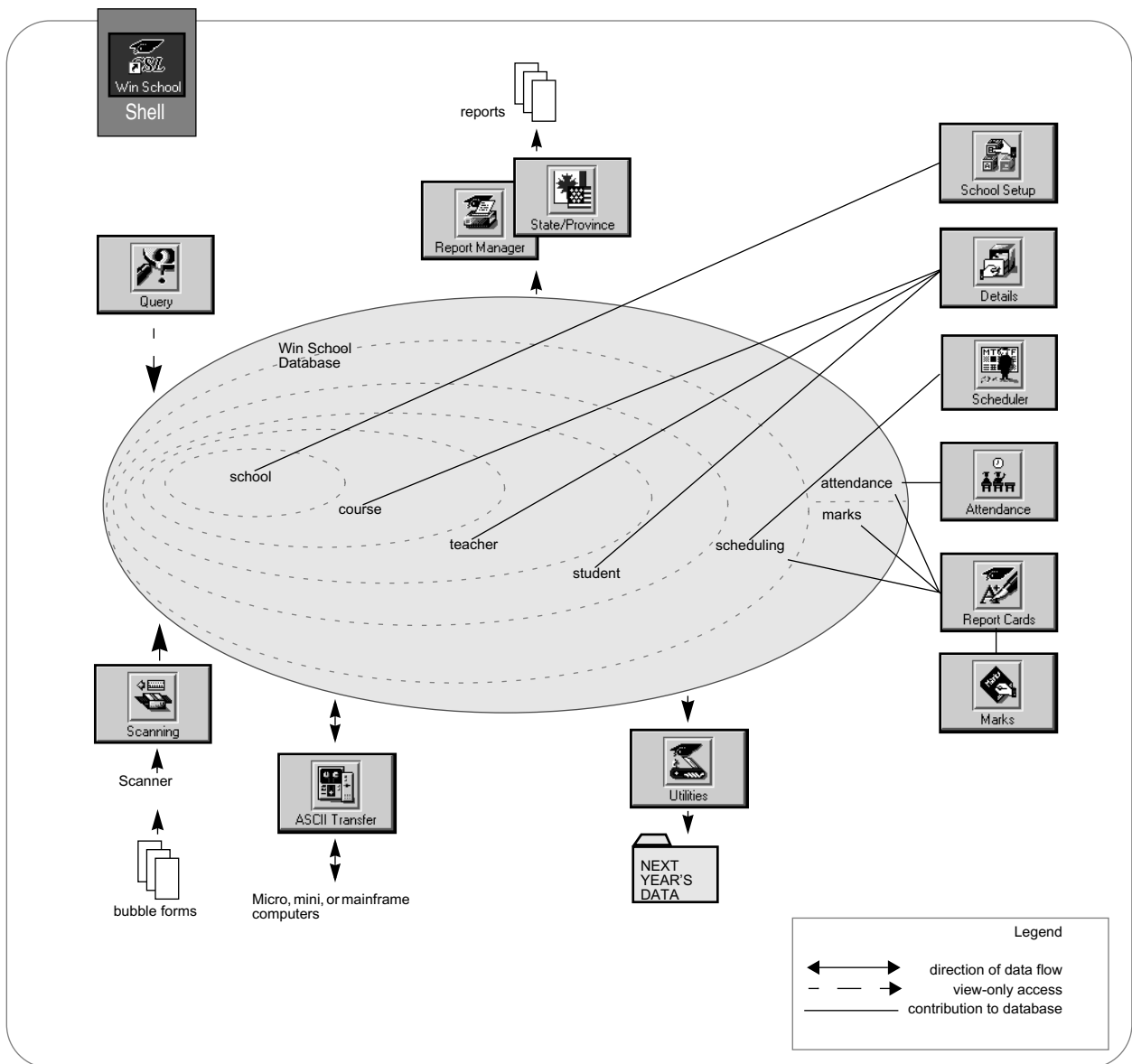
### ASCII Transfer

ASCII Transfer moves data between Win School and other applications running on micro-, mini-, or mainframe computers. ASCII Transfer, as its name implies, imports and exports data in any text-only (ASCII) format.



## Putting It All Together

The preceding sections describe individual Win School modules and how they connect to each other through the Win School database. The figure below takes this information and puts it all together into one picture.



### What's Next

This chapter has provided a conceptual view of how Win School works.

The next chapter walks you through the school year using Win School. It describes the tasks, the modules, and the staff involved at each step in the yearly cycle.



# Using Win School over the School Year

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This chapter describes running Win School over one school year.

We recommend schools take the yearly schedule described here and use it as a guide for developing their own.

This schedule describes the tasks that need to be completed and the modules they can be done in. It also suggests which staff might be responsible for doing these tasks. You might not have the same staff available to complete these tasks. These suggested users are to help you determine who might perform these duties at your school, and to emphasize that one person cannot handle all the tasks involved in running Win School.

For simplicity, our sample schedule begins the school year in September and ends in June. There is a mid-term report card issued in November and February, and a final one in June. Schools can adapt this schedule to fit their own yearly cycle. For example, schools that run year round or have students attending different semesters need to adjust the schedule accordingly.

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## Before School Begins

### August

Do these tasks	Using these modules	Who does it?
enter or update setup info, such as school year, term dates, popup lists, passwords	School Setup	Most often done by two staff: one who decides what data to enter; the other who actually enters the data. Could be a principal and a clerk, or a computing teacher and a secretary.  A great deal of information is entered the first time your school uses Win School. After this, only a few changes are required each year to keep the data up to date. Most of this data is the same from year to year.

<b>Do these tasks</b>	<b>Using these modules</b>	<b>Who does it?</b>
enter or update courses, teachers, and students for current year  delete last year's graduates and non-returning students	Details ASCII Transfer	Most often a secretary or clerk, or when importing data, the technical support person  A great deal of data is entered the first time your school uses Win School. Daily maintenance is required to keep student records up to date; yearly maintenance to keep teacher and course records updated.
schedule school and students	Scheduler Report Cards ASCII Transfer Scanning	Most often done by two staff: one who decides what data to enter; the other who actually enters the data. Could be a principal and a clerk, or a computing teacher and a secretary.  The first schedule usually takes the longest to build. Many schools then copy and fine tune it from year to year.
create or update custom reports	Report Manager	Most often done by main office support staff.

---

## School Begins

### September

<b>Do these tasks</b>	<b>Using these modules</b>	<b>Who does it?</b>
clean up enrollment discrepancies, including withdrawing and re-entering students	Details	Most often vice-principals, counselors, secretaries, and clerks
schedule new students and print timetables	Scheduler Report Cards	Most often vice-principals, counselors, secretaries, and clerks

---

## Throughout the School Year

### September to June

Do these tasks	Using these modules	Who does it?
take attendance	Attendance Scanning	Most often secretaries, clerks, teachers
track student marks	Report Cards Marks Scanning ASCII Transfer	Most often secretaries, clerks, teachers, with the help of the technical support person
run reports	Report Manager Attendance Scheduler Report Cards Details Marks State/Prov Query Utilities	All staff but most often principal, vice-principal, secretaries, and clerks
view information	Query	All staff

---

## End of Semester

### November and February

Do these tasks	Using these modules	Who does it?
generate report cards	Report Cards Marks Report Manager	Main office staff, counselors, teachers

---

## Mid-Year

### February to March

Do these tasks	Using these modules	Who does it?
prepare for next year including creating next year's data directory and preparing next year's data	Shell Scheduler Report Cards School Setup Details	Staff responsible for maintaining system. Could be principal, secretary, technical co-ordinator, or the technical support person
draft school and student schedules for next year	Scheduler ASCII Transfer Scanning	

---

## End of School Year

### June

Do these tasks	Using these modules	Who does it?
generate final report cards and update historical marks	Report Cards Marks Report Manager	Most often main office staff, counselors, teachers

### July

Do these tasks	Using these modules	Who does it?
run year end and graduate students	Utilities Report Cards Details	Staff responsible for maintaining system. Could be principal, secretary, technical co-ordinator, or technical support person

# Strategies for the First Year

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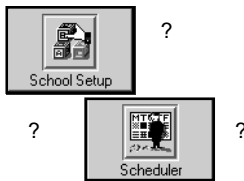
Every school wants to have a successful installation and setup.

**This chapter describes three strategies that will help schools do this:**

- phasing in Win School
- timing your implementation
- clarifying staff responsibilities

---

## Phasing in Win School



Because it takes time to learn new software, many schools make their implementations easier by phasing in modules rather than using them all at once.

For example, schools can install School Setup, Details, and Attendance the first year; and then, after they are familiar with the system, add Scheduler in the second year. Or, install School Setup, Details, and Scheduler in the first months, and add Report Cards and Attendance later in the year. How schools phase in modules depends on which tasks are essential at the time of year Win School is installed.

Also some schools opt to run parallel systems—both their old systems and Win School—for up to a year, using their old systems as backup.

---

## Timing a Successful Implementation

Here are a couple of factors to consider when your school is figuring out how to get Win School up and running successfully:

- length of time to learn Win School

Learning times will vary depending on the computing experience of staff, how much training staff receive, and how often they use a particular module. Schools who schedule sufficient time to learn the software get the best results.

In addition, some tasks are done daily; others, such as next year prep, only once a year. To become completely familiar with Win School, staff need to work with modules over one complete school year.

- the optimal time to train staff

The best time to train staff is just after Win School is installed and before setup has begun. After reading the Win School guides, staff can try their hands at some basic tasks such as entering School Setup data or enrolling students in Details.

Staff get the most out of training when they have a basic familiarity with Win School vocabulary and with the operation of the software, and when they have prepared questions about problems specific to their school's system.

- how long it takes to enter data in School Setup and Details

Schools enter a lot of data in these two modules when setting up for the first time.

The following table lists estimated data-entry times for a school with 900 students. These estimates assume that staff are ready to enter data—they are trained on the modules and know setup information such as student numbers, room numbers, and school semester dates. If staff are importing data, the files will need to be ready to import in ASCII format.

<b>Module</b>	<b>Estimated data-entry time</b>
School Setup	1/2 day to 2 days
Details	1 to 2 days, depending on whether data is being imported as ASCII files or entered manually

- how long it takes to build school and students' schedules in Scheduler

Times vary depending on the complexity of your schedules and how course requirements are entered. Here're some estimated times for a school with 900 students:

<b>Year</b>	<b>Estimated time to schedule</b>
1st year	1 to 2 weeks
2nd year	1 to 2 days

---

## Clarifying Staff Responsibilities

Establishing staff responsibilities early on can lessen problems resulting from confusion over which staff are responsible for what duties.

**In this guide, responsibilities are divided according to two user types:**

- the general user
- the Administrator

The term “Administrator” is one used frequently in Win School guides. For a detailed description of the Administrator's duties, see the Win School System Administrator Guide.

Read the following table and identify who fits these roles in your school. Staff might be either general users or Administrators, or both general users and Administrators, depending on the size of your school, and the skills, interests, and current responsibilities of staff.

User Types	Duties	Skills	Who Fits this Role?
general users	<ul style="list-style-type: none"> <li>• responsible for a few tasks using one or two modules</li> <li>• only need to know how to use “their” modules</li> <li>• go to the Administrator for help</li> </ul>	<ul style="list-style-type: none"> <li>• know one or two specific tasks, such as enrolling students or recording attendance</li> <li>• need a basic knowledge of the Windows environment</li> </ul>	<p>Depending on how responsibilities are divided in your school, a general user could be a secretary, clerk, teacher, counselor, principal, vice-principal, and so on.</p>
Administrator	<p>Responsible for running the entire Win School System, including:</p> <ul style="list-style-type: none"> <li>• installing and setting up the software for general users</li> <li>• troubleshooting problems</li> <li>• contacting Chancery Technical Support for help, if needed</li> </ul>	<ul style="list-style-type: none"> <li>• needs to know how entire school operates, not just one or two departments</li> <li>• needs a solid understanding of Windows operating system and Win School SIS system</li> </ul>	<p>Depending on the size of your school and the complexity of its operating system, the Administrator could be several people.</p> <p>Ideally, schools already have on staff a technology co-ordinator who is responsible for running the school or district network. Or one staff member, such as the principal, can team up with an offsite MIS person.</p> <p>However schools often do not have this option. Schools then have the “techie person,” such as the computing science teacher or admin secretary with a computing background, fulfill this role. Schools that are most successful give their staff the time and training to learn their job.</p>



# Reviewing Basics

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Win School modules are easy to use because they are consistent in how they work and what they look like on your screen.

Win School uses many standard Windows features, but it also has a few of its own.

**This section describes:**

- what Windows features you should already know
- how to launch and quit Win School
- basic Win School operating features and conventions

---

## What You Should Already Know

You should have a basic understanding of your computer and be familiar with the Microsoft Windows environment.

If you don't know how to use Windows features, take the time to learn before you start Win School. Get a co-worker experienced with Windows to show you how to use it or refer to your Windows documentation.

### General Checklist

**Before you begin, check that you know how to do these tasks:**

- Turn your computer on and off, using proper startup and shutdown procedures.
- Use a mouse.
- Work with scroll bars, windows, and dialog boxes.
- Work with stayup, popup, and pull-down menus.
- Enter and edit text.
- Minimize, maximize, resize, and close windows.
- Create, open, and save files.
- Select a printer and print setup options.
- Copy files to and from diskettes or over a network.

### Administrator Checklist

If you are responsible for Administrator tasks, refer to the Win School Administrator guide for a checklist of what you should know before you begin.

## Starting and Quitting Win School

To start Win School, you first start the Shell and then your modules. The reverse procedure happens when you want to quit Win School: first you quit your modules and then the Shell.

The Shell is always running when Win School modules are running.

### Starting the Shell and Modules

#### Before You Begin

- ❑ If you run the multi-user version of Win School, the Win School Server must be running and you must be logged onto the Server before you can start.

For details on how to start and use the Server, see the Win School Administrator guide.

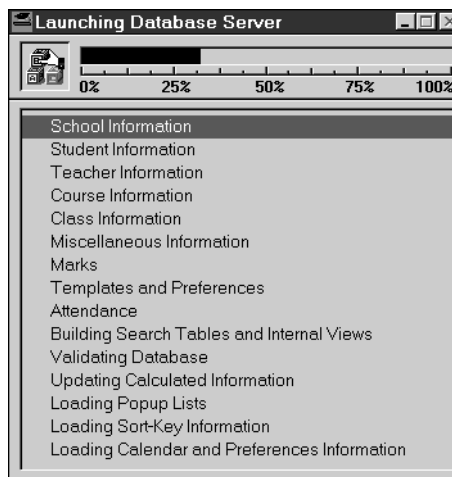
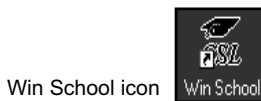
- ❑ Have your password and user ID ready.

If user IDs are not yet created, use “0”.

If you are unsure of your password and ID, staff with proper access can check them in the Passwords dialog in School Setup.

#### To start the Shell:

- 1 Double-click the CSL Win School icon from the Start menu.
- 2 A status dialog appears, showing the Shell’s progress reading your Win School data. Do nothing; simply wait for the Shell to complete its work.



- 3 In the Logon dialog that appears, type your user ID and password.










## Changing Column Widths

To better display data for viewing or printing, you can change the width of some columns.

Point your cursor at this line. 

To change a column's width, point the mouse arrow at the thick border line at the top of the column. The arrow turns into a hand. Click and drag left or right to move the column border.

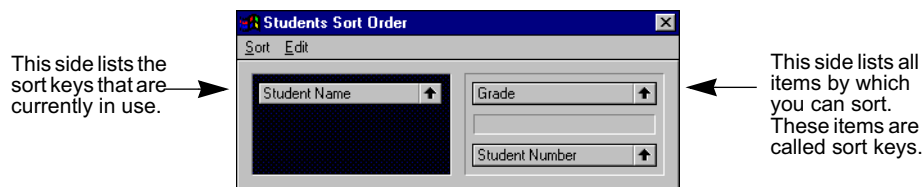
## Sorting Students

In any window that lists students, you can sort the students in ascending or descending order by student name, student number, or grade.

You can also create a sorting hierarchy. For example, you can sort students by grade, then by name within each grade.

### To sort students:

- 1 From the Edit menu, choose Sort. The Students Sort Order dialog appears.



- 2 Choose your sort keys and arrange the sort order.

To	Do this
select a key for sorting	Click and drag it from the right to the left side.
remove a key from sorting	Click and drag it from the left to the right side.
sort in ascending order	Click the arrow next to the sort key until it points up.
sort in descending order	Click the arrow next to the sort key until it points down.
sort a key first	Click and drag the key to the top of the list on the left side. The top key is sorted first.
clear all current sort keys	From the Edit menu, choose Clear.
to revert to the previous sort order	From the Edit menu, choose Revert.

- 3 From the Sort menu in the Students Sort Order dialog, choose Sort All.

You are returned to the active window. Your students are listed in the order you determined.



### Keyboard Search Tip

To search for an item in a list, you can do a keyboard search. For example, to search for a student in a list of students sorted by name, type the first letter of the student's surname. The first student displaying these letters is highlighted.

The first sort key is the criteria by which the keyboard search is performed. In other words, if you want to sort for a particular grade, make grade your first sort key; if by student number, make student numbers the first sort key.

## Finding System and Module Information

System information can be helpful when troubleshooting problems or setting up the system.

To find	Do this from the Shell
information on these system files: Autoexec Batch Configuration Win School Initialization System Initialization Windows Initialization	From the Shell menu, choose Technical Support. The Technical Support report is displayed to your screen.
version number of modules	From the Shell menu, choose View Info. The text icon appears, displaying the version number. To return to the graphic icon, choose View Info again.
	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>Graphic icon</p> </div> <div style="text-align: center;">  <p>Text icon</p> </div> </div>

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## Manipulating Windows and Screens

The following Win School features make your software more convenient to use:

- locking and unlocking your screen
- minimizing the shell and modules

## Locking and Unlocking Your Screen

You lock your screen to prevent anyone from looking at or changing your data while you are away from your computer. When you lock your screen, you don't have to quit the module you are running and restart it.

To	Do this
lock your screen	In the title bar, click the key icon. A darkened screen appears. Your screen is now locked. No one can use your computer until you unlock it.   Key Icon
unlock your screen	To display the password dialog, click the darkened screen. In the dialog that appears, type your password and press Enter. Remember to use capitals if your password contains them. You are returned to the active window.

## Minimizing the Shell and Modules

If you are running several modules simultaneously, you can reduce all the applications, except the one you are working in, to an icon.

To	Do this
minimize a module	Open a module. From the File menu, choose Set Aside. The module is reduced to an icon.
make a module the active window	Click the module icon.
minimize the Shell	Display the Shell. From the File menu, choose Minimize for Use. The shell is reduced to an icon.
make the Shell the active window	Open a module. From the File menu in a module, choose Win School Shell.

---

## Generating Win School Reports

**In Win School, you can generate three types of reports:**

- built-in reports

Built-in reports are ready-to-use reports that come with—are “built-in” to—your software. Generally these reports are listed as options under the Reports menu in each module.

For instructions on how to generate a report, refer to the guide for that module.

- custom reports

Custom reports are school-designed reports. They are generated from templates that staff create in Report Manager.

Templates define the form and content of the report. Report Manager generates the report from Win School data according to the template specifications.

- reports of selected items in the active window

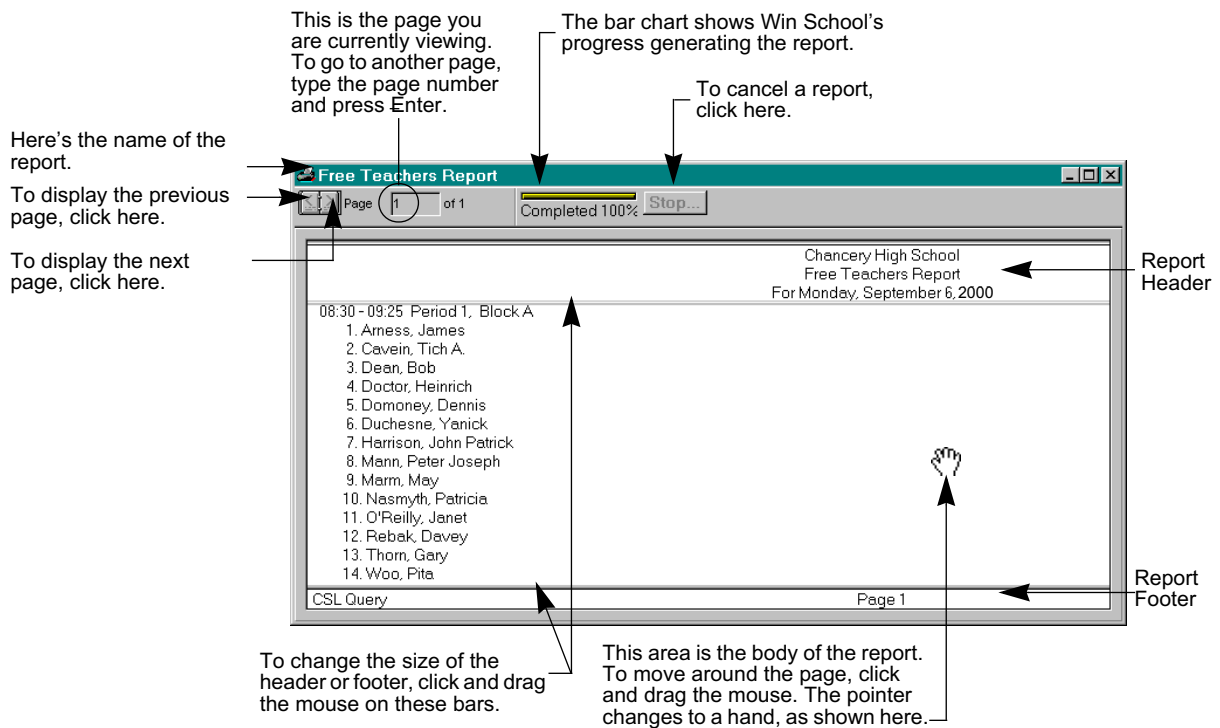
In some modules, you can print a report of items selected in the window you are viewing.

This section begins by describing the Report Window and some basic operating features, such as printing the contents of the Report Window and setting report margins. The section ends by describing how to generate customs reports as well as reports of the active window.

### Report Window at a Glance

When you generate a report in Win School, the report is automatically displayed to your screen. The window that displays your report is called the Report window.

The following figure shows a typical Report window. Most Report windows display some or all of these features.

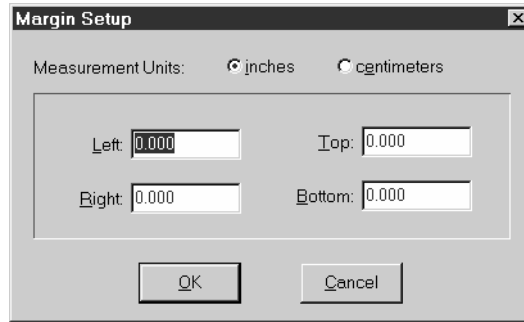


## Setting Page Margins for Reports

From the Shell, you can set the page margins for your reports.

### To set margins:

- 1 Display the Shell.
- 2 From the System menu, choose Margin Setup. Its dialog appears.



- 3 Select either inches or centimeters.
- 4 Type left, right, top, and bottom margins for your report.
- 5 Click OK.

All your reports are printed with these margins until you change the setting.

## Selecting Report Options

In Report Manager, staff create templates for custom reports. These templates are often too generic for what you want reported. For example, a template generates student names, numbers, and grades, and you want to print only female students in grade 10.

To be more selective in the data a custom template generates, you set report options for the template. You do this by selecting the “Use Report Options” checkbox in the Custom Template dialog when printing a custom template. This opens a selection of tab dialogs from which you can select the data you want printed.

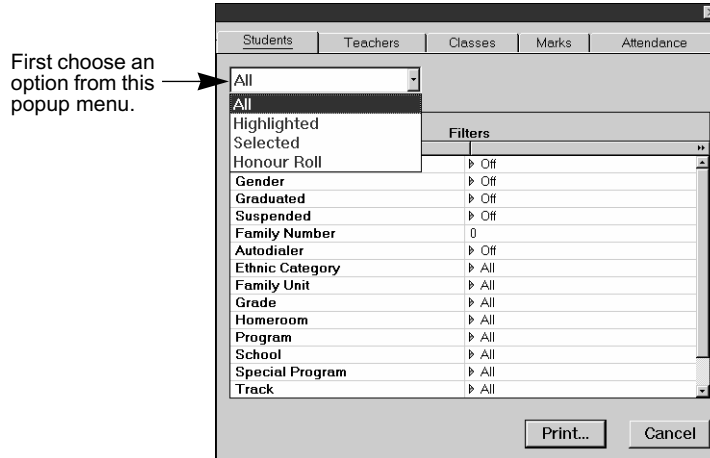
To	Refer to
select data related to students, teachers, or classes	“Selecting Data Related to Student, Teachers, or Classes” on page 39
select report card bins	“Selecting Report Card Bins” on page 41
select attendance dates and periods	“Selecting Attendance Dates and Periods” on page 42

### Selecting Data Related to Student, Teachers, or Classes

The procedure for selecting student, teacher, or class data is same. For simplicity, the following instructions tell you how to select specific data for printing on student reports.

**To select report options:**

- 1 From the Main window, select the items to be printed.  
For example, if your report template prints student data, you need to select the students to be included in the report. The same applies to teachers and classes.
- 2 Open the Student tab dialog for the custom template you are using.
- 3 From the top popup menu, choose an option.

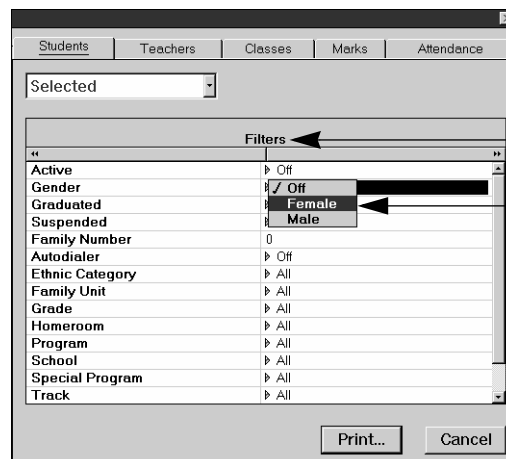


**To print**

**Choose**

all items in the Main window	All
all highlighted items in the Main window	Highlighted
all selected items in the Main window	Selected
all students in the Main window who are selected and on the Honor Roll	Honor Roll
all students in the Main window who are selected and on the weighted Honor Roll	Honor (Weighted)

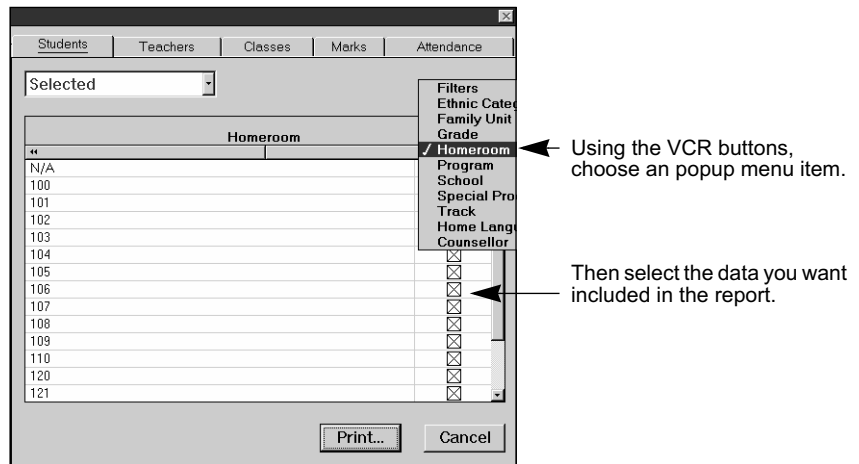
- 4 If you have selected all your options, click Print. If you need to select more options, using the VCR buttons, choose Filter from the popup menu if it is not already displayed. Then choose your options from the popup menus in the lower part of the dialog.



To	Select this option
not include the item in report	Off
include only items with a value of Yes	Yes
include only items with a value of No	No
include only males	Male
include only females	Female
include only items with a value of All	All
include only items with a value of N/A	N/A
include only items selected in next step	Selected
include the selected item	other options

- If you chose Selected in previous step, you need to select more options. Otherwise, click Print.

To select further options, using the VCR buttons, select a popup menu item.



- Using the checkboxes, select the data you want included in the report.
- Repeat steps 5 and 6 until all your options are selected.
- Click Print.

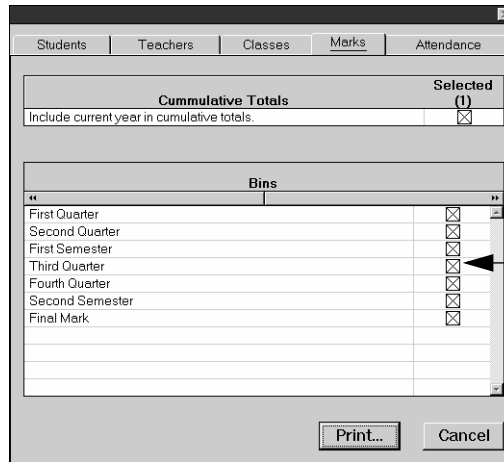
### Selecting Report Card Bins

To generate marks, you need to select the report card bins you want data generated from.

#### To select report card bins:

- From the Main window, if necessary, select the items to be printed.  
For example, if your report template prints student data, you need to select the students to be included in the report. The same applies to teachers and classes.
- Open the Marks tab dialog for the custom template you are using.

- 3 Select the bins you want printed.



Select the report bins you want marks data generated from.

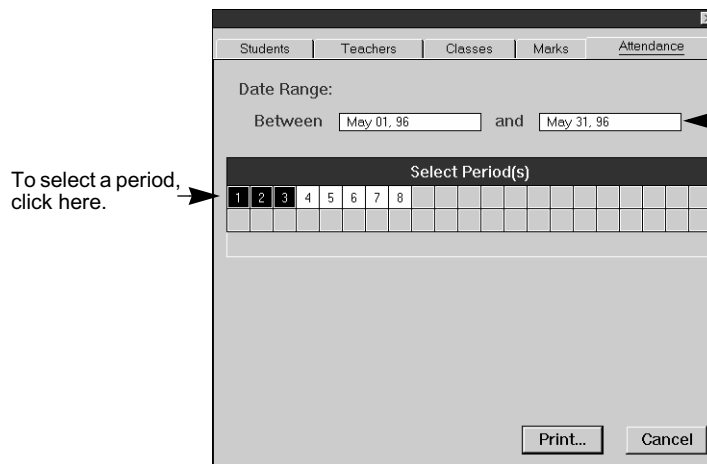
- 4 Click Print.

### Selecting Attendance Dates and Periods

When generating attendance reports, you can specify the dates and periods to be reported.

#### To select attendance dates and periods:

- 1 From the Main window, if necessary, select the items to be printed.  
For example, if your report template prints student data, select the students to be included in the report.
- 2 Open the Attendance tab dialog for the custom template you are using.
- 3 Type your attendance dates. Select your periods.



Type date range here.

To select a period, click here.

- 4 Click Print.

## Generating Custom Reports

Custom reports are school-designed reports; they are not built into the software. Custom reports are generated from templates that staff create in Report Manager.

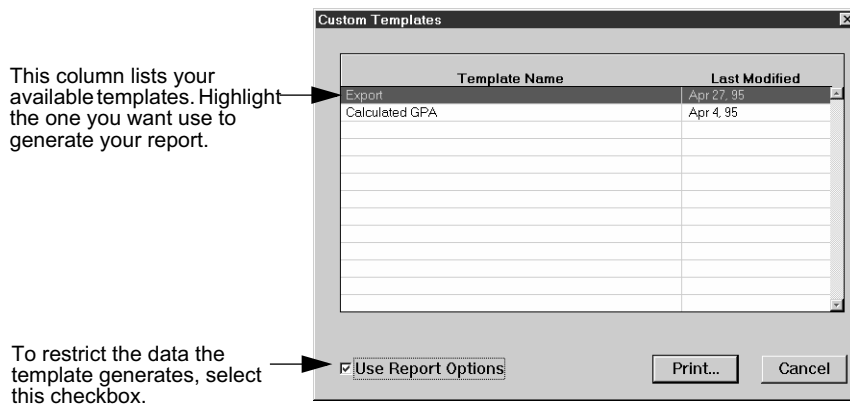
You can print custom reports from modules other than Report Manager. The following procedure tells you how to do this.

### Before You Begin

- ❑ In Report Manager, check that the template exists, that it is up to date, and the module you want to generate the report from has been assigned access to this template.

### To generate a custom report:

- 1 From the Main window, if necessary, select the items for the report.  
For example, if your report template prints student data, you need to select the students to be included in the report. The same applies to teachers and classes.
- 2 From the Report menu, choose Custom Templates.



- 3 In the “Template Name” column, highlight the appropriate template.
- 4 If you want to restrict the data the template generates, select the “Use Report Options” checkbox.

For example, if the template generates student names, numbers, and grades, and you want to print only female students in grade 10, select this checkbox to open a set of Report Option dialogs from which you can restrict data.

- 5 Click Print.

Depending on the options selected, you might need to complete more dialogs before your report is displayed to the Report window, or your report is displayed directly.

## Printing Reports

When you generate a report, it automatically appears in the Report window on your screen. Follow these instructions to send your report to the printer.

### Before You Begin

- Set the page margins of your report.

### To print the Report window:

- 1 From the System menu, choose Print.
- 2 In the Printer dialog that appears, choose your options and click OK.
- 3 Click OK.

The report is sent to the printer.

## Printing the Active Window

In some modules, you can print a report of items selected in the window you are viewing. This is a simple, yet useful, procedure to know.

For example, in Attendance, you can highlight multiple students and print attendance information for those students. The same procedure applies in Details, except, instead of highlighting students, you select them.

Generally, staff can print a report of information in any list window that displays select boxes.

### To print selected items in the active window:

- 1 Select or highlight the items you want reported.
- 2 From the System menu, choose Print.  
In the Print dialog appears, choose your options and click OK.
- 3 Click OK.

---

## Setting Win School Preferences

You can control how Win School operates by selecting options called preferences. When you set preferences, you are defining the following:

- How Win School makes its calculations and displays some data.
- The language and date range Win School operates in.
- The server Win School runs from.

### Setting System, User, and Module Preferences

In Win School, there are three preference levels where you set date, display, and calculation preferences:

- System Preferences affect all Win School users and modules.
- User Preferences affect only the user who sets them and the modules she or he is running.
- Module-Specific Preferences affect only one module.

#### How To Set Preferences

System and User preferences can be set in four modules: Details, Report Cards, Report Manager, and Scheduler. Module-specific preferences can only be set in the module they apply to.

For detailed instructions on how set preferences, refer to the online help for these modules.

#### Who Can Set Preferences

Any staff member with more than view access to the previously mentioned modules can set preferences. Because of this, we recommend the system administrator be in charge of establishing guidelines for setting preferences in your school. Refer to the “Setting Up” chapter of the Win School System Administrator Guide for detailed instructions.

### Selecting a Language

To set the language Win School operates in, follow these steps. Some schools have two options: English or French.

#### To set the language:

- 1 Display the Shell.
- 2 From the Shell menu, choose Language.
- 3 In the dialog that appears, click the appropriate Language icon.
- 4 Click OK.

## Selecting a Server

This feature is for schools running multi-user version of Win School who want to change to another Win School server. For example, larger schools occasionally store data from different years on separate servers.

### To switch servers:

- 1 Display the Shell.
- 2 From the Shell menu, choose Set Preferred Server.
- 3 In the dialog that appears, highlight the server you want to access the next time you start Win School.
- 4 Click OK.

You are returned to the Shell. The next time you start Win School, you will start under the new server. You are connected to this server until you change your selection.



To have a dialog prompt you for the server each time you start Win School, from the Shell menu, choose Always Prompt for Server. A checkmark appears next to this option in the Shell menu. To deactivate this feature, simply choose the option again. The checkmark disappears. You are no longer prompted for a server.

---

## Special Administrator Features

The following table lists some special district-related tasks that the Administrator performs from the Shell.

To	Do this from the Shell
print the administrator's log to the screen	From the Shell menu, choose Administrator's Log. The log is printed to the screen.
upload automatically to a district at a specified time	From the Shell menu, choose Auto-launch. A dialog appears that enables you to activate auto-launch.
view or delete uploading reports	From the Shell menu, choose either View Auto-launch Report or Delete Auto-launch Report.

## Using Query

---

Query is the one module from which you can view all your school data. Without transferring to another module, you can view:

- student schedules, attendance, marks, and conduct
- student and teacher demographic data
- course and class data

You can also print reports of some active windows and generate reports from Report Manager templates.

Query is a view-only module. This means you can view data but you cannot add, change, or delete it.

---

## Setting Up

In Query, setup is straightforward.

If your school uses passwords, check you have the correct password access in School Setup.

**The data you can view depends on:**

- Your password access to other modules.  
You can view data for all modules to which you have View, Change Only, or Edit access. If your access to a module is None, the icon for that module is dimmed.
- The modules your school has purchased.  
If your school has not purchased a module, you cannot view its data; and the icon for that module is dimmed.

View-only works well for schools on a network. One staff member can view data while other staff are running other modules.

---

## Using Query Windows

**Use 3 windows in Query to view data:**

- the Main window
- the Student Detail window
- the Teacher Detail window

## Main Window

When you start Query, the Main window is the first one to open. From the Main window, you can view a list of all students and teachers in your school, and open their detail windows.

You can use Menu options to look at:

- the student detail window for information about 1 student
- the teacher detail window for information about 1 teacher

You can display up to 5 windows at a time. This allows you to work with several student records at the same time, or to work with several records of 1 student.

To display a list of students, click this icon.

To display a list of teachers, click this icon.

To open a detail window, double-click a name.

Number	Student Name	Grade	Homeroom Number	C. Rank L. Grade	Graduation Status	Selected (0)
1	Abrett, Manfred	♂ 11	107		Not Grad...	<input type="checkbox"/>
4	Allsop, Blair Alain	♂ 11	107		Not Grad...	<input type="checkbox"/>
5	Allsop, Susan Frances	♀ 12	102		Not Grad...	<input type="checkbox"/>
2	Allyn, Richard Darren	♂ 12	100		Not Grad...	<input type="checkbox"/>
6	Anstey, Jennifer Marg...	♀ 12	106		Not Grad...	<input type="checkbox"/>

## Teacher Detail Window

The teacher detail window displays information about 1 teacher.

## Student Detail Window

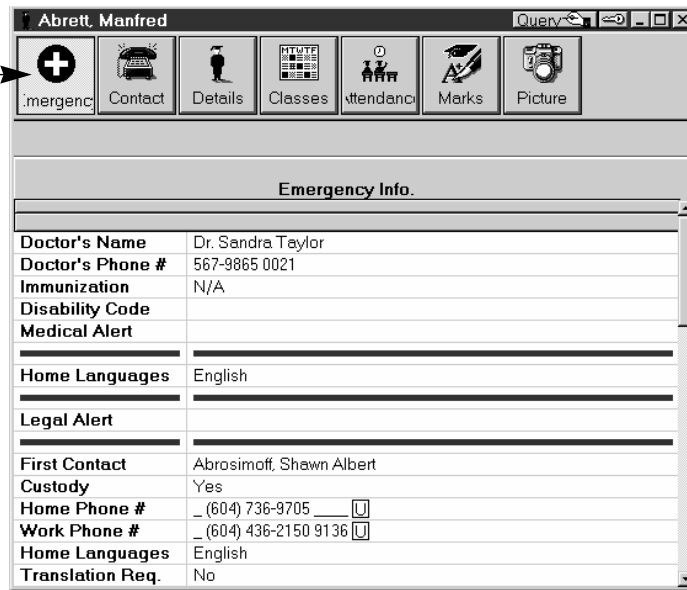
To display another view, click an icon. This window shows the Classes view.

This pointer tells you what class the teacher is currently in.

Time	Class Name	Room Number
13:30 - 14:25		
14:30 - 15:25		
15:30 - 16:25	Chemistry 11 (1)	105

The student detail window displays information about 1 student.

To display another view, click one of these icons. This window shows the Emergency view.



## Working with Several Windows

Query has several special features that allow you to move quickly between windows or display several windows at the same time, for example, when you want to monitor the progress of one student.

To	Do this
Open 1 detail window	In the Main window, do one of the following: <ul style="list-style-type: none"> <li>double-click a name</li> <li>highlight a name, then from the File menu, choose Open</li> <li>highlight a name, then press Enter</li> </ul>
Work with several detail windows	In the Main window, from the Windows menu, choose Multiple Windows.
Open several detail windows at once	In the Main window, from the Windows menu, choose Multiple Windows. Next select the names you want to open. Then, from the File menu, choose Open Selected Items.
Close all selected detail windows simultaneously	In the Main window, from the File menu, choose Close Selected Items.  For this feature to work, Multiple Windows feature and the designated windows must be selected.
Close all open detail windows	In the Main window, from the File menu, choose Close All Detail Windows.
Open the next detail window listed in the Main window	With 1 student's detail window already open, make the Main window active. Then do one of the following: <ul style="list-style-type: none"> <li>To go to the previous name, from the Query menu, choose Previous.</li> <li>To go to the next name, from the Query menu, choose Next.</li> </ul>

## Viewing Data

In Query, you can view student, teacher, and class information. Before you begin, you need to verify the dates for which you are viewing information.

### Using the Calendar

#### To look at student, teacher, and class information, first select:

- The date of the student classes, timetables, and rooms you want to view. The current date is the default date.
- For attendance totals, the date range.

Then select the type of data.

#### To set a viewing date for classes, timetables, and rooms:









- 1 Display the Main window.
- 2 From the Query menu, select Calendar.
- 3 In the dialog that appears, use the VCR buttons to set the year, month, and day you want to view.
- 4 Click OK. The dialog closes and you return to the Main window. The date range is set until you change it.

#### To set an attendance date range:

- 1 Display the Main window.
- 2 From the Edit menu, select Attendance Date Range. The Attendance Date Range dialog appears.
- 3 Use the VCR buttons to set the year, month, and day you want totals for. Click OK. The date range is set until you change it.


#### Calendar Codes

The days in the calendar may be of different types depending on the appearance of each day icon:

	Today		Half day
	Initialized day		ADA day
	Selected day		Day outside of term
	Normal day		Holiday

## Viewing Student Information

The following table gives a quick overview of where to find student information in Query. For more information about specific fields, use Query’s online help.

To find	Look in
A list of all students in your school	In the Main window, select the Student icon.
A Student record from the Details module including: Personal information Contact information Groups and activities	In the student detail window, select Details. To display more information, use the VCR buttons.
A student schedule of classes and rooms for a selected day	In the student detail window, select Classes. To display more information, use the VCR buttons. The hand pointer  tells you which class the student is currently in.
Daily and period attendance	In the student detail window, select Attendance. To display more information, use the VCR buttons.
Student term and final marks	In the student detail window, select Marks. To display more information, use the VCR buttons.
Contact information including: Legal alert and contact information Home and work phone numbers Custody status	In the student detail window, select Contact.
Emergency information including: Contacts Home language Doctor and medical information	In the student detail window, select Emergency.
Student picture	In the student detail window, select Picture. To adjust the picture on your screen, use the VCR buttons.  Pictures must be loaded into the database from the Details module before you can view them.

### Viewing Details

In the Student Detail window, click the Details icon to display information from the student record in the Details module.

For more information, click the VCR buttons at the top of each column to select a type of information to display.

Personal Info displays student names, addresses, grade, homeroom, birthdate, and schools. This information is all entered on the Personal tab in Details.

Contact’s Info displays information for up to 6 contacts, depending on how many contacts are entered for the student in the Details module.

Miscellaneous Info displays programs, track, counselor, ethnic category, home language, lunch status, and user definable lists.

Transportation, Legal, and Health Info displays full medical information from the Health tab in Student Details, the Legal Alert, and the 6 Transportation fields.

Medical Comments displays information from the Health tab in Student Details.

Comments displays any comments entered for the student in the Personal tab in Details.

Activities displays any activities entered for the student on the Personal tab in Details.

Groups Info lists any groups entered for the student.

Status Info lists the student status codes.

Conduct Info lists the student conduct codes.

User Codes list the student user codes.

User Definable Fields displays all the user-definable fields.

User Definable Flags displays all the user-definable flags.

### Viewing Classes

In the Student Detail window, click the Classes icon to display the schedule of classes and rooms for a student for the selected day. This icon will be dimmed if:

- there are no scheduled classes for that student on the selected viewing date
- the viewing date is outside the Scheduler term date range set in School Setup
- relative days have not been initialized

You may change the viewing date in the Calendar window to see the list of classes for a student.

Use the VCR buttons in the Classes window to display different columns.

Column	Meaning
Time	Time of day that a class is in session.  The 🖱️ indicates in which class a student is scheduled or in which class a teacher is teaching.
Period	First time in your timetable that this class meets. Available only if classes were scheduled in Scheduler.
Period Name	Defined in the Period Labels dialog from the Scheduler menu in School Setup. Available only if classes were scheduled in Scheduler.
Block	Indicates the first block of the first time in your timetable that this class meets. Available only if classes were scheduled in Scheduler.
Block Name	Defined in the Block Labels dialog from the Scheduler menu in School Setup. Available only if classes were scheduled in Scheduler.

Column	Meaning
Attendance (Long Code) (Short Code)	Assigned to a student in the Attendance module. View long or short code as set in School Setup in the Attendance menu, Period Attendance codes.
Class Name	Three possible elements: Name: Course Name from Details. Grade: Grade Level of the course. Section: number identifying the section (class) of the course.
Class Number	Number of the class.
Class Alternate Name	Alternate Name entered in Details for the course. Your school may use this field to store an abbreviated form of the class name or a name for internal use only.
Teacher Name	Name of the teacher for this class.
Teacher Number	The teacher number, not the employee number.
Room Number	Room number where the class is taught.
Room Type	Set up in the Rooms menu of School Setup.
Room Capacity	Indicates the maximum number of students that a room will hold. Set in School Setup.
Room Phone Number	The room phone number.
Room Title	Room name different from the room type. Entered in School Setup.

### Viewing Attendance and Marks

Set the views for your query window by using the popup menus directly below the icons. Then use the VCR buttons to select the columns you prefer.

Column	Meaning
Attendance Present Absent Excused Absent Unexcused Late Excused Late Unexcused	Class attendance accounted by period. Account for presence, absence, and lateness according to either values or occurrences.  For example, Values can be Present = 0.5 and Absent = 0.5 for a student present for half a period and absent for half a period. Occurrences can be Present = 1.0 and Absent = 1.0 for a student present on Monday and absent on Monday.
Citizenship	A letter grade reflecting the student conduct as a citizen of the class.
Class Alternate Name	The Alternate Name entered in Details for the course.  Your school may use this field to store an abbreviated form of the class name or a name for internal use only
Class Name	Class Name has 3 possible elements:  Name: the Course Name from Details.  Grade: the Grade Level of the course.  Section: the number identifying the section (class) of the course.

<b>Column</b>	<b>Meaning</b>
Class Terms	The terms in which each class meets. Two sections of the same course can meet in different terms.
Comm. 1 -5	A student can have up to 5 comments in a bin for each class.
Earned Credits	Earned Credits reflect the student performance in the class, as well as the duration of the class.  Usually the maximum number of credits a student can earn in a class is the number of Potential Credits. At some schools, students who pass the class earn the full number of potential credits, while students who fail the class earn no credits. At other schools, students can earn a range of credits, depending on their marks in the class.
Grade Points	Grade Points reflect the student performance in class.
Is Final Mark	Indicates whether the marks on that row counts towards the student's final GPA, Earned Credit, and Potential Credit totals.
Is Honors	Indicates the student is attempting honors work in the class. It does not reflect the student's performance nor that the student is on the Honor Roll.
Is Weighted	Indicates that the marks on that row are to be weighted in weighted honor roll and class rank calculations.
Letter Grade	The letter grade corresponding to the percentage.
Main Classroom	The main classroom for a class.
Name (Class)	Class Name has 3 possible elements:  Name: the Course Name from Details.  Grade: the Grade Level of the course.  Section: the number identifying the section (class) of the course.
P & C Table	Points and credits tables describe how percentages correspond to letter grades, grade points, earned credits, and pass/fail status. This view lists the table that was used to calculate the marks.
Pass/Fail	Current mark is a passing or failing mark for the class or the course.
Percent	Use with Letter Grade & Comments, the percentage grade achieved by a student.
Potential Credits	Maximum credits for the class. A class with more student-teacher contact hours usually has more potential credits.
Print Flag	To print the marks information for a specific class.
School	The school in which the class is taught.
Teacher Name	The teacher for this class.
Terms	Terms in which each class meets. Two sections of the same course can meet in different terms.
Used in E. Credit	Indicates that the marks on that row are to be included in total Earned Credit calculations.
Used in GPA	Indicates that the marks on that row are to be included in GPA and total Potential Credit calculations.
User Flags	Your school decides whether it wants to use User Flags, and if so, what each is for.
Work Habit	A letter grade reflecting the student study habits.


### Viewing a Picture

To display a picture, load it in Details.

In Query, click the picture icon to view the student picture and use the VCR buttons to set the picture justification on the screen.

### Viewing Teacher Information

The following table gives a quick overview of where to find teacher information in Query. For more information, use Query’s online help.

To view	Do this
A list of all teachers in your school	In the Main window, select Teacher.
Schedule of classes and rooms for a selected day for a specific teacher	In the teacher detail window, select Classes. To display more information, use the VCR buttons. The hand pointer  tells you which class the teacher is currently in.
Teacher record from Details, including: Personal information Address and home phone number	In the teacher detail window, select Details. To display more information, use the VCR buttons.
Homeroom information, including: Phone number Number and capacity	In the Main window, select Teacher. To display more information, use the VCR buttons

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## Generating Query Reports

**In the Query module, you can generate the following reports:**

- Free Teachers report  
The Free Teachers report lists teachers who are scheduled as free for a specific day and period.
- Free Rooms report  
The Free Rooms report lists rooms that are free on a specific day and period.
- Custom report  
Use templates created in Report Manager.

## **Generating Reports on Free Teachers and Free Rooms**

The procedure for generating these reports is the same.

### **To generate the report:**

- 1 Display the Main window.
- 2 From the Reports menu, select either the Free Teachers report or the Free Rooms report.
- 3 In the calendar at the top of the dialog, set the year, month, and day with the VCR buttons and by clicking on a day icon.
- 4 In the Selected column, select the period or periods.
- 5 Click OK to generate the report.
- 6 To send the report to the printer, choose Print from the System menu. Click the icon left of the window title.

## **Generating Custom Reports**

If your school has developed its own reports, refer to the Report Manager Guide or online help for information.

# Main Glossary

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This glossary defines terms specific to Win School. For terms describing your Windows operating system, refer to its guide.

**Active Window** The window you are viewing. If you have several windows open, the active window is the one on top.

**Active/Inactive Status** See Inactive.

**Administrator** A Win School user type. The staff person or people responsible for running the Win School system, including installing and setting up the software, and troubleshooting problems. See also General User.

**Aide Type** Staff enter aides types in Teacher Details and request aides for courses in Course Details. Scheduler uses this information to schedule aides into classes when building timetables. For detailed information, see the user guides or online help for Details and Scheduler.

**Alphanumeric** A combination of letters and numbers. For example, A101.

**Application** A software program. The Win School Shell, Server, and modules are applications.

**ASCII** Pronounced “ask-ee.” An acronym for American Standard Code for Information Interchange. ASCII is a language common to many software programs. Because many word processing programs can open an ASCII file and display its text, ASCII files are also called text files.

**Backup** A copy of your data you store on either a diskette or the server, in case the original data is damaged. Most schools back up their data at the end of each day. Because the computer’s hard disk can be damaged, a backup copy should not be stored on the same computer as the original data.

**Bins** Contain students’ term or mid-term marks for all their classes. In School Setup, you can define up to 30 Report Cards bins. For detailed information, see the user guides or online help for School Setup, Report Cards, and Marks.

**Block** The smallest unit of your schedule. For detailed information, see the user guides or online help for School Setup and Scheduler.

**Block Timetable** A schedule built on blocks rather than times. A block timetable describes the number of periods in a day and your school cycle. See also Cycle. For detailed information, see the user guide or online help for School Setup.

**Built-In Report** Ready-to-use reports that come with (are built into) your Win School software. Most often listed as menu options under the Report menu. See also Custom Reports.

**Case-Sensitive** Recognizing upper and lower case letters. In Win School, passwords are case sensitive. For example, “Imago” and “imago” are two different passwords.

**Checkboxes** Many features and options are turned on and off using checkboxes. This checkbox is selected . This one deselected .

**Choose** Select from a menu.

**Class** A section of a course. Class names usually appear as the course name, grade, followed by the section number, in parentheses. For example, Math 6 (2). Classes are created in either Scheduler or Report Cards.

**Class Capacity** Either the “Maximum Class Size” or the capacity of the room in which it is scheduled, whichever is smaller. For detailed information, see the user guide or online help for Details.

**Class Roster** A list of the students in a class. You create class rosters using Scheduler or Report Cards.

**Click** To press and quickly release the mouse button.

**Cluster** A group of students who are in the same program, grade, and required course section(s). For detailed information, see the user guide or online help for Scheduler.

**Comment** A prepared phrase you can select to describe a student’s behavior for reports and report cards.

**Consolidation** In Marks, the average of selected marks from one or more tasks that is stored as a new, separate task in any folder.

**Constraint** A restriction on the data to be printed in a report. Only those items meeting the report’s constraints are printed.

**Course** See Class.

**Custom Report** School-designed reports that are generated from templates created in Report Manager.

**Cycle** A pattern of days that is repeated in your school schedule. See also Fixed Day and Relative Day cycles. For detailed information, see the user guide or online help for School Setup.

**Data** Factual information, such as student names or numbers, that staff enter using modules.

**Database** A collection of all your school’s data, including student, teacher, and course data; scheduling data; attendance and student marks data.

**Default** A value or setting that Win School automatically displays.

**Delimiter** A character that marks the end of a field or record.

**Detail Window** A window displaying detailed information about one item, such as a student, teacher, or class. See also List Window.

**Directory** A folder that stores Win School software or data. Your Win School module directory stores your modules; similarly, your Win School data is stored in a data directory.

**Double-click** Two mouse clicks in quick succession.

**Elective** A course that a student is not required to take to graduate. See also Required.

**Exception Code** Any period or daily attendance code that is not Present.

**Export** To transfer a copy of Win School data to an ASCII file, for use by other computers or applications.

**Field** A space in a window or dialog that contains data, or where you enter data. For example, a student's last name is a field, as is the student's number and gender. A field can contain numbers, letters, or alphanumeric characters. See also Flag.

**Filters** See Constraints.

**Fixed Day Cycle** A schedule that lasts for 1 or 2 calendar weeks before repeating. On a *one-week fixed cycle*, every Monday is the same. If a holiday falls on a Monday, that day of the schedule is skipped, and on Tuesday, the schedule resumes with Tuesday classes. On a *two-week fixed cycle*, the same principles apply, except that your scheduling pattern runs for two weeks before it is repeated.

**Flag** A special type of data field that can have only two possible settings. For example, "Yes" or "No." See also Field.

**Folder** (1) In Marks, a folder holds a group of related tasks. You can create as many folders as you need for each class. (2) In Windows '95, another name for a directory.

**Folder Calculation Method** The method Marks uses to calculate students' percentage scores in one particular folder. Possible methods are Total Points, Scalar Weight, and Percentage Weight.

**Folder Percentage** In Marks, the amount one folder contributes to the final mark. This can be a value out of 100%, or any number that indicates the folder's weight relative to other folders.

**Grading Scheme** A collection of information in a Points & Credits table, describing the numeric range of each letter grade as well as other course-related values established by the school.

**Following Triplet** Courses that are taught in consecutive periods in the same day.

**General User** A Win School user type. Staff responsible for performing tasks in one or two modules only, such as attendance clerks or counselors. See also Administrator.

**Graduated** Status of a student. You set a student's graduated status manually in Report Cards. Any student who has graduated gets a status of "Graduate." All other students are "Not Graduated." In Details, graduated students appear with bullets (•) beside their names.

**Honors Status** (1) A student's status for a class. Honors status means a student is doing honors work in the class and is graded according to the Honors marks in the Points & Credits table. For detailed information, see the user guides and online help for Report Cards or Marks. (2) A setting that indicates whether a student has made the Honor Roll. If so, the student's Honors Status displays as "Yes" in the main student window in Report Cards. For detailed information, see the user guide or online help for Report Cards.

**IDs** Stands for Identification Number. For example, course IDs, teacher IDs, and student IDs.

**Inactive** (1) Inactive students are not enrolled in school. Inactive students appear in italics. (2) In a student's list of classes, an inactive class is a class a student transferred out of before the class ended. The class is inactive for that student. Similarly, in a class' list of students, any student who transferred out appears in

italics. That student is inactive in that class. For detailed information, see the user guide or online help for Report Cards.

**Initialize** In Attendance, double-clicking a day in the Calendar window to open the day. When you initialize a day, Win School assigns a value to the day to prepare it for your attendance information. If a day is not initialized, you cannot view or take that day's attendance.

**Italicized Names** See Inactive.

**Key Icon** Enables you to lock your computer screen to prevent anyone from accessing your data when you leave your computer unattended. The Key icon is displayed in the Win School title bar.

**Launch** To start a Win School application, such as the Shell, or a module.

**Letter Grade** A letter, such as A or B, that represents a student's mark.

**Linked Group** Courses that are taught in the same period. They may be taught on different days, different terms, or simultaneously.

**List Window** A window displaying lists of items, such as students, teachers, or classes. See also Detail Window.

**Localize** To set spelling, terminology, and report options specific to your state or province. For detailed information, see the user guide or online help for School Setup.

**Lock Icon** Indicates you have view-only access or no access to data. Fields are locked if you don't have password access to them, if they have been locked from School Setup, or if another user on your network already has edit access to them.

**Main Office** In Marks, any staff at your school, such as secretaries or administrators, who are responsible for collecting teachers marks and generating student report cards. In most schools, these staff work out of the main office. For teachers using Marks with Win School, the main office generates report cards using Win School Report Cards.

**Main Window** Generally, the first window to appear when you launch a module.

**Mark** The grade assigned to a student. A mark can be a letter grade, percentage, or special mark.

**Marks Stand-alone** When you run Marks Stand-alone, you do not connect to nor share data with any other Win School software.

**Marks with Win School** When you run Marks with Win School, you share data with Win School Report Cards either through a network or by copying data from diskettes.

**Modules** Win School software programs. For example, School Setup and Details.

**Multi-Tasking** A process that allows a computer to perform two or more tasks at the same time. For example, it enables you to work on a spreadsheet while printing a report.

**Multi-User** Using the multi-user version of Win School, more than one person can access Win School data at the same time from different computers over a network.

**Numeric** Numbers only. For example, "456." See also Alphanumeric.

**Occurrence** Attendance totals can be calculated in terms of occurrences. A code with any non-zero present, late, or absent value counts as one present, late, or absent occurrence. For detailed information, see the user guide or online help for Attendance.

**Off-Track** Year-round schools run students and teachers on tracks. Students and teachers are off-track during the terms that they are on holidays. See also On-Track.

**Online Help** Help available on-screen when you are running Win School.

**On-Track** Year-round schools run students and teachers on tracks. Students and teachers are on-track when they attend school. See also Off-Track.

**P&C** Stands for Points & Credits. See Points and Credits.

**Percentage** In Marks, a number out of 100 that represents a student's mark for a task or group of tasks.

**Percentage Weight** In Marks, a number between 1 and 100 that defines the percent of the folder total that each task is worth.

**Points and Credits** Points and Credits tables define your school's regular and honors grading scheme. Win School uses these tables to correlate percentages, letter grades, grade points, earned credits, and the pass/fail status.

**Press** You press keys on the keyboard. You click buttons on the mouse.

**Record** All information in a database about one item, such as a student or teacher.

**Register** Built-in attendance reports that contain student names, dates, and attendance codes.

**Relative Day** A rotating schedule that can have up to 18 days. If every day has the same classes scheduled in the same order, you have a 1-day cycle. For detailed information, see the user guide or online help for School Setup.

**Report** See Custom Report and Built-in Report.

**Request List** A list of requested programs for students. You create this list in Details.

**Required** A course that a student must take to graduate. Any course that is not required is an Elective.

**Restore** To copy data to your hard drive from a backup.

**Resource Mapping** A technique for scheduling classes that meet in the same room at the same time with separate teachers, or that meet in different rooms at the same time with the same teacher.

**Rotating Cycle** See Relative Day Cycle.

**Scalar Weight** In Marks, a number that defines a task's relative value to the folder's total.

**School Timetable** Your school schedule. It describes who teaches what classes, at what time, and in which room. See also Student Timetable.

**Secret Names** Letters and/or numbers assigned to a student to provide anonymity when posting student marks.

**Select** To choose an item, such as a checkbox, field, or icon, in a window or dialog.

**Server** A computer that provides services for staff on a network.

**Single-user** The single-user version of Win School enables only one staff at a time to access a data directory. If your school has a network, different staff can use Win School, but they can't access the same data directory simultaneously. See Multi-User.

**Smart Pronoun** Codes that you use instead of names and pronouns when entering comments. When comments are printed, these codes are replaced with the student's name or gender-specific pronoun. For example, the code “^d” prints as “son” or “daughter.”

**Special Mark** In Marks, a word, such as “Omit” or “Cheated”, that you can enter in place of a mark to indicate why a student received no mark. The word entered determines whether the student gets zero for a task, or the task is omitted from the student's averages.

**Stand-Alone** A stand-alone computer is not connected to any other computers through a network.

**Statistics** Built-in attendance reports that contain attendance totals, without student names, for a specified date.

**Student Cluster** A student cluster is a group of students in the same program and grade who take the same section or sections of required courses.

**Student Timetable** A student schedule. It describes which classes a student is taking, at what time, in which room, and with which teacher. See also School Timetable.

**Summary** Built-in attendance reports that contain student names and attendance totals for a specified date.

**System Administrator** See Administrator.

**System menu** A standard Windows menu located at the top left corner of each window's title bar. This menu offers useful options such as Close and Print.

**Tab Dialogs** Detail windows that look like file folders with tabs at the top. For example, in Details, a student's personal information is organized on one tab and conduct information is organized on another.

**Task** In Marks, an assignment or activity for which each student receives a mark. You can create as many tasks as you need within each folder. A task is defined by its maximum score and its value relative to other tasks.

**Teacher File** In Marks, the data file that stores all your information, including your classes, class rosters, student scores, and report card marks.

**Technical Support** Chancery's telephone support.

**Term** In School Setup, you define Scheduler terms and Attendance terms.

A Scheduler term is the length of the shortest class taught at your school. Attendance terms are date ranges for attendance totals. These dates may be the same as the Scheduler term dates, or, if you report attendance twice in each term, they may be half of a Scheduler term.

**Template** A file that defines the content and look of a report.

**Text File** See **ASCII**.

**Timetable** A school or student schedule. See **School Timetable** and **Student Timetable**.

**Title Bar** The horizontal bar at the top of a window that shows the name of the window.

**Total Points** In **Marks**, a flag which indicates whether the task is counted in the folder calculations. "Yes" means the tasks is counted; a "No" means it is not.

**Track** Schools that meet year-round place students and teachers on tracks. Each track meets for different terms of the year. In any term, one or more tracks may be on vacation.

**Update Notes** Information on new features, fixes, and changes about a new version of Win School. Update notes accompany the Win School diskettes when the new version is shipped to you.

**User ID** A sequence of numbers and characters you must type to gain access to Win School.

**Value** In **School Setup**, each daily and period code is assigned Present, Absent, and Late values, usually between 0.000 and 1.000. Attendance can be totalled by adding these values. See also **Occurrences**.

**VCR Button** A button with two arrows that usually appears at the top of a column. Click this button to change the data displayed in the column.

**Volume** A general term referring to a storage device or to part of a storage medium formatted to contain files. A volume can be an entire disk or only part of a disk.

**Weight** In **Marks**, a value that indicates a folder's or task's importance relative to other folders or tasks. A task's weight shows how much the task contributes to the folder total. A folder's weight shows how much the folder contributes to the student's final mark for that class.

**Win School** Chancery Software's student administration system for the Windows environment.

**Year-Round** Schools that are open all year round. They place their students and teachers on tracks. Each track meets for different terms of the year. In any term, one or more tracks may be on vacation.



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