



SchoolWrite *Manual*



Academic records

for Windows 



School accounts

YEAR	1	1N	ENROLMENT			ABSENCE		
			Male	Femal	Total	Male	Femal	Total
YEAR 1	1N	49	23	72	4	3	7	
YEAR 1	1S	34	34	68	2	3	5	
YEAR 1	1A	25	36	61	0	0	0	
YEAR 1		111	93	204	6	6	12	
YEAR 2	2N	30	32	62	0	0	0	
YEAR 2	2S	24	34	58	0	0	0	
YEAR 2	2U	26	32	58	0	0	0	
					0	0	0	






TABLE OF CONTENTS

	Page
Introduction	
SchoolWrite Introduction	1
Features of the modules	4
SchoolWrite for tertiary colleges	7
System Requirements	10
Licensing	11
Printouts	
Printout requests	13
Printer Settings	14
Previewing Reports	15
Setup	
Installing on the Hard Disk	17
Initialising Data Files	19
Profile & General Setup	20
Account Numbers Setup	23
Sports House Setup	25
Fees Setup	26
Discounts Setup	28
Institution Setup (Internal Codes)	30
Basic Names Setup	31
Finance Codes Setup	32
Getting ready to use SchoolWrite	34
File Naming conventions	35
Tour of SchoolWrite	36
Setting up Academic Records	39



File Menu		
	School Calendar	44
	Calculator and Notepad	46
	Backup & Restore	47
	Index Files	48
	Check for Updates	49
	Tailored program	50
	Export Student details	52
	Export Student subjects	54
	Export Enrolments	56
	Export SchoolWrite databases	59
	Export to Library System	60
Students		
	Student Details	62
	Student Information on screen-Tabs	64
	Student subsidiary databases	68
	Student printouts and graphs	74
	Extra Subjects Marks	75
	Outcomes Based Reporting	77
	Student Transcripts	81
	Email End-of-Term Reports	83
	Promote Students	87
	Prepare new Term	88
End of School Year		
	Year end processes	90
	Create archive copy of SchoolWrite	91
	End of Year Processes	92
Intranet		
	Accessing the SchoolWrite Intranet	94
	Refreshing the Intranet	96



Parents		
	Parent Details	98
	Parent Financial Details	101
	Parent printouts and graphs	103
	Deleting Parents	104
Communicate with Parents		
	SMS / Email / Letters	105
	Quick-Send SMS /email	108
	Absentee email notifications	110
	Parents Standard Letters	113
School Fees Menu		
	School Banking Charges and Adjustments	115
	Finance Codes	121
	Automatic Billing of School Fees	123
	Parents Fees Statements	127
	Email Parents Fees Statements	130
	Fees Transactions Lists	133
	Payment Categories	134
	Follow-up of Overdue Fees	135
	Period End and Year End	137
	Charging Interest on overdue fees	139
Second Currency Fees Menu		
	When a Second Currency is used	140
	Second Currency Control Information	141
	Second Currency Fees Menu	143
Computer Fund		
	Computer Fund or Building Fund	144
	List Computer Fund Transactions	145
	Print Computer Fund Receipts	146



Future Enrolments		
	Introduction to Future Enrolments	147
	Future Enrolment Details	149
	Future Enrolment Standard Letters	154
	Rollover to Students and Parents	157
Past Students		
	Past Student Details	158
	Printouts and Reports	161
	Past Student Standard Letters	162
Timetable Printing		
	Timetable introduction and setup	164
	Timetable Screen	166
	Print Timetables	168
	Prepare Next Term's Timetable	170
ReportWrite		
	Upload and Download teacher classes	172
	Mark Entry Control Report	174
	Using ReportWrite on USB Drive or network	176
	ReportWrite for non subject class teachers	177
	ReportWrite for subject teachers	179
	Spell Check Options	181
General Ledger		
	Introduction to General Ledger	183
	Enter Cheques Deposits and Journals	184
	Enquiry on Postings Entered	186
	General Ledger printouts and reports	187
	Financial reporting	188
	Finance Codes and Chart of Accounts	191
	Budget Periods and Amounts	194
	End of Financial Year	197



	Bank Reconciliation	
	Bank Postings Presented	199
	Bank Reconciliation Report	200
Creditors		
	Introduction to Creditors	201
	Creditor Details	203
	Enter Invoices	205
	Paying Invoices	207
	Hold and unhold invoices	210
	Cheque and Remittance layout	211
	Purge Old Creditors Invoice	212
Miscellaneous Menu		
	Change Term Year and Processing Date	213
	Miscellaneous Files	214
	Passwords	218
	Control Information	220
	Setup Email / SMS	221
Setup SMS Provider		
	Sending SMS text messages	224
	Open an account with Clickatell	225
	Preparing to send SMS Messages	226
	Setting up SMS Provider and SchoolWrite	229
	Letterhead Graphics	231
	Register Software	232
Help Menu		
	OnScreen Help and Print Documentation	235
	Fast keyboard navigation	237
	Notes for System Support	240

SchoolWrite Introduction



This is the SchoolWrite logo. It does not belong to any particular school. You may use it, or you may wish to substitute your own school logo.



supporting quality education.

web site: www.schoolwrite.com

help: support@schoolwrite.com

SchoolWrite is multi-functional for every department of the school. It integrates control of financial activities with academic records management. It provides an automatic fees billing system with selective follow-up of overdue fees.

SchoolWrite is a user-friendly environment, which is comfortable for school administration staff who may not be especially computer-literate. The menu-driven screens have detailed explanations, along with many user-entered options. The operator does not need to be a programmer or a database expert!

SchoolWrite is an open system. It provides a web-based interface, for staff using totally familiar web browsers. SchoolWrite also has open data access, which means that data is accessible by other software.

The SchoolWrite main menu provides access to eight modules. Each module is totally integrated with the others. Yet each module can stand alone, allowing schools to select which components they wish to install.



Students



Parents



Future
Enrolments



Past Students



Timetable Printing

For the 1st five modules, the picture icon is the quick way to start. The same effect is achieved by clicking on the module name, and selecting the first item on the pull-down menu.

When a module is opened, it replaces the previous one. The screen is free from clutter as there is only one major window open at a time. To re-open a previous module, click on the picture icon. It will come back to the screen exactly where you left it.

The following modules do not have separate picture icons - they are each started via their pull-down menu:

- ReportWrite
- General Ledger
- Creditors

Pull-down menus are the starting points for all functions associated with modules - eg

Printing reports. These menus may be activated regardless of the module that is currently on the screen. Eg Students printouts may be requested whilst the Parents module is open.

SchoolWrite is screen-driven and prompts the user with menu selections to achieve the desired purpose. All selections are obtained by entering keys (as indicated on the screen) or by clicking with the mouse.

Staff **Payroll** is a separate, integrated module which runs in a totally separate program - for security reasons. ie the payroll is run from a separate icon, and only authorised staff are provided with this icon.

In the **File** Menu, options provide the immediate on-screen services of

- a calendar and appointment tracker (directly linked to the SchoolWrite **Intranet** School Calendar display)
- the Windows calculator
- The Windows notepad

SchoolWrite intranet provides browser-based access to student data from any work station on the school network, even if they are not running SchoolWrite software. Student details displayed on the Intranet are updated in real time – changes made via SchoolWrite are immediately visible.

The SchoolWrite Intranet Browser is started from the "big button" on the front screen of SchoolWrite - the Intranet opens in another Window.



Browsers. All browsers are supported, including Microsoft Internet Explorer and Mozilla Firefox. The default Browser opens at the internal Intranet page. All work stations on the network, even those that are not given access to SchoolWrite menus, may access the SchoolWrite Intranet.

The SchoolWrite Intranet is secure, because data changes are made in the password-protected background work engine – i.e. SchoolWrite software. User access is open to the Intranet, and no passwords are required. Information displayed does not include confidential financial data and personal notes. The Intranet pages may be published on a separate web server. However it is recommended that care be taken in publishing children's photographs, home addresses, or home phone numbers. The world wide web is not a safe place for such information compared to the confines of a school intranet.

SchoolWrite software is the background work engine. It combines comprehensive academic and family details with a flexible billing system, and links this information with a school ledger. Using family and academic records for billing as well as administration, ensures minimum data entry, and results in the use of up-to-date information in all areas of the school. The utilisation of this information by faculty as well as administrative staff will enhance the performance of the whole school.

The Students module gives total control over student records. On one screen details about students can be viewed throughout their school life. There are over 20 different printouts and listings for students.

The Parents module groups students from the same family under the one parent code. Here the family and home address details are found. It is here that automatic fees billing takes place. The whole school can be billed for tuition fees and extra charges within minutes. Fees Statements are mailed or emailed to parents, and there are many reports, printouts and standard letters which facilitate the follow-up of overdue fees.

A Timetable printing module, a Future Enrolments module and a Past Students module

provide a total management solution for schools, assisting staff to efficiently manage the day-to-day running of the school.

ReportWrite provides teachers a tool for on-screen entry of comments, marks and gradings for their own classes. Down-load areas on USB Drives or designated areas on the network, are prepared from the main school computer, for teachers to use away from the main school office. Software is provided with their class student data, so that teachers can work independently on their end-of-term reports - even working from home. When marks, gradings and comments have been entered, they are up loaded back to the main school computer. When all uploads are complete, Report Cards are printed centrally. ReportWrite downloads may also be prepared for non-teaching staff, to enter their comments (year coordinator, principal, etc). From start to end, the process adds professionalism to a school.

Password protection:

A sophisticated password protection system is provided. Password security prevents users from accessing sensitive areas, or allows other users to 'look but not touch'. When passwords are activated, the user is requested to enter their name as well as their password before using the software. When a user has certain access permissions *denied*, those options will not appear on their screens. Eg when a user is denied update access to Students, the buttons for **Add**, **Edit** and **Delete** will not appear on the screen.

SchoolWrite software "remembers" previous settings for this name and password, eg for printout requests. The system also logs each option selected by this person. The log may be accessed by the system administrator.

Open Data Access. All of the school's data used in SchoolWrite can be openly accessed. It is standard database (dBase) format, and can be imported into Microsoft Excel and Access. Report generator software can also access the data – Crystal Reports, R&R Report Writer, etc. SchoolWrite prepares export files with data ready to be used from a quick-launch Excel button.



3.4.1g

Features of the modules

FEATURES of STUDENT module

The Student module has total control of all student records. On one screen you can view details about students throughout their school life:

- subjects for each term
- marks for each subject
- discipline
- absenteeisms
- positions held
- accidents & illnesses
- immunisation status
- emergency phone numbers
- transport ticketing details
- confidential family notes
- musical instruments & orchestras

More than 20 print-outs and listings may be selected from menus. Immunisation status is shown with reports available to be printed in the event of an outbreak of sickness. Totals for language groups for first languages spoken at home may be printed out. Students may be listed by age for Sports lists or Government returns. Subject Class lists show accelerated students, and allow composite classes. End-of-term reports show marks, assessments and grades, and teacher's comments.

Promotion of students to new grades at end of year is an automatic process.

FEATURES of TIMETABLE module

Reduce administration time by making timetables available to everyone in the school. Periods taught by Teacher are easily entered, along with room numbers where classes are taught. Timetables may be printed for:

- Students
- Teachers
- Room usage
- Whole school

Student timetables may be viewed on screen. Free Teachers and Free Rooms lists give a quick indication of available resources when emergencies occur.

FEATURES of PAST STUDENTS module

Reduce administration effort in keeping track of past students. Students are automatically transferred to Past Students on graduation. Mailing labels and standard letters may be printed by alumni year, to receive newsletters and fund raising material. On screen, previous academic results, and positions held whilst at school may be viewed, making it easy to provide references and achievement statements.

FEATURES of ENROLMENTS module

Organisation and control over all future Enrolment enquiries and placements is a feature of this software. Standard letters may be printed for selected groups of prospective parents, and Enrolment fees collected. Marketing source statistics may be viewed at any time.

Applications that are accepted are 'rolled over' to Students and Parents, requiring little or no further keyboard entry when the student commences. Administration time at the start of year is significantly reduced.

FEATURES of PARENTS module

Increase your school cash flow through simple and accurate accounting, and quick follow-up of outstanding fees. The billing of school fees and charges was never so easy. SchoolWrite interfaces automatically with the SW Ledger System, and manually with all other General Ledger and bookkeeping systems. All money received at the school is banked and Bank Deposit forms are printed. Income is split to give separate receipts for fees received and for a special fund (Building Fund or P & C).

There is an option to charge interest on overdue fees, calculated automatically. Follow up of overdue accounts is made easy with selective print-outs, and by emailing Fees Statements as pdf file attachments.

More than 10 family listings and print-outs are available from Menus. Standard letters may be printed for selected groups of parents.

Emergency phone numbers are available for quick on-screen access, as well as confidential family notes of unlimited length.

Parents are notified of student absences with automatic emails, within minutes of the roll being marked.

FEATURES of GENERAL LEDGER module

The General Ledger module is totally integrated with the other modules of SchoolWrite. It is menu-driven and friendly and easy to use. The General Ledger is an accounting system for non-Accountants. It has a user definable chart of accounts with a standard set of accounts pre-defined for schools.

Cheques, Deposits & Journals are the main transaction entries. They have unlimited capacity per transaction, handling any size journal entry or **Cheque** disbursement. Date validation at time of entry with quick look up of Finance Codes by number or name. Automatic balance checking when entering transactions ensures correct double entry accounting.

An audit trail of entries, and a posting activity report is printed for each transaction entry session. Details of Finance Codes and transactions are displayed on screen or printed at any time. A standard Profit & Loss Statement and Balance Sheet is available, requiring no set-up. Report generation facility allows tailored financial reports to be set up, to meet all business reporting needs.

At end of Year, the Ledger is kept open for adjustments for up to 12 months. End of Year adjustments are automatically brought forward to the new year's ledger. The SchoolWrite General Ledger accords completely with standard accounting principles.

FEATURES of CREDITORS module

The Creditors (Accounts Payable) runs alongside the SchoolWrite General Ledger System, and is fully integrated with it. The Creditors module is an Accounts Payable system which prints **Cheques**, accumulates a history of transactions for each creditor, and it monitors the future Cash Flow of the school.

Creditors invoices are entered on a daily basis, as soon as they arrive in the office. Invoices are split over any number of Finance Codes. When an invoice is received, a decision must be made regarding its due date for payment. This Due date is an important part of the data-entry of the invoice. It is this date which enables a projected cash flow report to be produced.

Invoices are selected for payment, either on the basis of Due Date, or by Creditor code, or individually. Remittance advices, and Cheque forms if required, are printed. A cash

requirements report shows the total of funds for payments about to be made. A projected cash flow report is a helpful management tool, and shows the total of funds required by all future dates.

FEATURES of PAYROLL module

The SW Payroll system features strong security. It is a separate menu from all other SchoolWrite modules. It is fully integrated with the SchoolWrite General Ledger, and caters for manual links with all other General Ledger systems.

Employee details include teachers from the other SchoolWrite modules, and teachers' photos automatically link into the Payroll. All staff photos are visible whilst entering payroll information, providing visual validation. The Payroll handles salaried employees (such as teachers) and employees paid by the hour (such as maintenance staff), and pay periods may be weekly, fortnightly and monthly. No adjustments are needed for standard pays.

The Payroll has unlimited Earning Codes to define the employee's type of work or pay, and it has unlimited Cost Centres to define the location and costing of the employee. Electronic copies of employee payments may be transferred to the Bank via floppy disk, or via modem. Histories of employees pays are kept indefinitely, and annual Payment Summaries may be printed. Electronic copies of annual payment summaries may be transmitted to the Tax Office.

Other features include

- on-screen preview of payslips
- accrual of holiday leave, sick leave and long service leave
- superannuation calculated for employer and employee contributions
- on-screen changes to Tax rate variables,
- on-line help and documentation
- password protection

SchoolWrite for tertiary colleges

SchoolWrite may be configured for a tertiary institution.

A business college, tutoring college or university categorises students by their **Course** . Students are also categorised by **year** (1st Year, 2nd Year, etc).

Year	3
Course	1 Restaurant Mgmt
Faculty	HOSPITALITY
Tutor Group	A
Debtor code	BERGEG

Tertiary college

Year	11
Home Class	1
House	ABRAHAM
Parent code	JOHNSD

K-12 school

Example: The following structure might apply to a Training Institution:

Faculties:

- Hospitality
- Human Resources
- Marketing
- Operations

Courses within Hospitality Faculty:

- Restaurant Management
- Diploma in Hospitality
- Certificate III in Hospitality
- Certificate IV in Hospitality

Changes are made for a tertiary institutions in *Miscellaneous Menu - Control Information - "BASIC NAMES" TAB*:

MISCELLANEOUS MENU - CONTROL INFORMATION

1. COURSE:

When the word "Course" is keyed into the second "Basic Name" position, a table of Tertiary Courses opens, to add / change Courses. Courses Numbers **must** run from 1 sequentially.

Alternatively, the check-box 'Set Tertiary Courses' may be ticked to open the table of Tertiary Courses (this is used if the word 'Course' is not implemented).

Control Information SchoolWrite Demonstration

ESC=Save & Quit **Control Information**

Setup information is seldom changed. Some items are updated at the start of each school year.

Profile	Account numbers	Faculty
Institution	Years & Fees	Discounts
General	Scale/Theme	Basic names

This option is used to rename some of the standard headings within SchoolWrite. It allows for tertiary colleges to choose more appropriate names for the key areas they work in. The changes apply to Screens and Reports.

Replaces 'Year' / 'Grade' on screens
Year or Grade are possible substitutes (max 8 chars)

Replaces 'Home Class' on screens
Eg Stream, Roll Class, or COURSE (for Tertiary)

Replaces '(Sports) House' on screen
Eg 'Mentor Group' or 'Faculty' (max 12 chars)

Replaces 'Tutor Group' on screens
Eg 'Pastoral Grp' or 'Formation' (max 12 chars)
To assign or change the names of these groups select the Faculty TAB and individually name the Faculty and Tutor Groups to which students are assigned

Replaces 'Parent' on screen
'Debtor' or 'Member' are possible substitutes (max 6 chars)

Tertiary COURSES

Tertiary Course table

Esc=Close HotKeys Add Enter=Edit Delete

Course Number (from 1)	Course Title	Course Description
1	Restaurant Mgmt	Restaurant Management
2	Dip Hosp	Diploma in Hospitality
3	Hosp Cert 3	Certificate III in Hospitality
4	Hosp Cert 4	Certificate IV in Hospitality

setting up **Course** Names via Basic Names in Control Information screen

2. STREAM:

A tertiary college may have a **Faculty** in place of the **(Sports) House** of an elementary or secondary school. **Faculties** (up to 9) are entered with their own 15 character descriptor. See **Faculty** TAB above.

3. TUTOR GROUP:

A tertiary college may have **Tutor Groups** (or **Admin Group** or other name). Up to 9 Tutor Groups may be defined with their own 15-character descriptor. See **Faculty** TAB above. (If Tutor Groups are not required, then each of the Group names should be left blank.)

Each student is assigned to one of these groups.

5. DEBTORS:

The name **PARENT** may be changed, if there is a more appropriate name for the one who pays the fees. It is possible to change this globally - eg to **DEBTOR**.

Any 6 character (singular) may be keyed here eg "Debtor" or "Member". SchoolWrite should then be closed down and re-started. All references to "Parent" will be changed to the new name on menus, screens and printouts.

6. RESET ALL NAMES

To change all Basic names back to **K-12** names, enter **YES** in this option and click on **F4**. When SchoolWrite is closed and restarted, the standard K-12 names of **Year**, **Home Class**, **(Sports) House** & **Parent** will be in operation, as shown on the section of Student Details screen above - K-12 school.

FEES BILLING FOR TERTIARY INSTITUTIONS:

The Fees screen in Control Information (Miscellaneous Menu) is structured according to the Courses being offered by the tertiary institution.

Control Information SchoolWrite Demonstration

ESC=Save & Quit

Control Information

Setup information is seldom changed. Some items are updated at the start of each school year.

General		Scale/Theme		Basic names	
Profile		Account numbers		Faculty	
Institution		Years & Fees		Discounts	
School Fees		Special Fees		General Ledger Account Numbers	
Year	Amount	Amount	Disc	FEE	SPEC SCHL BURS DISC
Year 1	1000.00		Y	110	120 160 170 130
Year 2	1000.00		Y	110	120 160 170 130
Year 3	1000.00		Y	110	120 160 170 130
Year 4	1000.00		Y	110	120 160 170 130
Year 5			N		
Year 6			N		
Year 7			N		
Year 8			N		
Year 9			N		
Year 10			N		
Year 11			N		
Year 12			N		
13			N		
14			N		
15			N		

Note: A fees amount **must** be entered against each valid Year to ensure that Students can be allocated there. At least an amount of \$1 should be entered against each valid Year.

SUBJECTS:

Subjects are allocated to Students. eg Food & Bev. Management (FOOD), Concierge (CON), Housekeeping (HSE) etc. Fees may then be billed on the basis of Subjects and/or Courses.

BILLING SCHOOL FEES:

Automatic Fee Billing

ESC=Quit

☐ Confirm each student

CHARGES		Amount	Applies to yrs		Course	Tutor Group Faculty		Subject
Finance code & description			From	To				
1 110 Fees	1000.00	1	4	RESTAURAN				
2 110 Fees	50.00	2	3	RESTAURAN			FOOD	
3	0.00							
4	0.00							
5	0.00							
6	0.00							
7	0.00							
8	0.00							
9	0.00							
10	0.00							
11	0.00							
12	0.00							
13	0.00							
14	0.00							
15	0.00							

PgDis=Bill Now

Enter appropriate charges for each Course and each Subject.

Eg by entering the above screen, all students enrolled in the Restaurant Management Course will be billed \$1,000. In addition, only those students enrolled in 2nd and 3rd year and taking the subject FOOD (Food & Bev Management) will be billed \$50.

System Requirements

System requirements for proper installation and running of SchoolWrite software are:

- A single PC or network
- 1 GB or more of RAM
- WINDOWS Operating System
- Hard disk drive with 100MB free space
- Colour or Laser printer (all printed reports are designed for A4 paper)

Settings:

- Display settings: 1024 x 768
- Font size: small fonts

Optional:

- Multiple work stations
- network

SchoolWrite is designed for the Windows operating system, running on any computer with Windows 10, Windows 8 or Windows 7, and all older versions (Windows 95, 98, ME, NT, 2000, Vista, and XP). SchoolWrite is multi-user, and works in any network environment.

SchoolWrite works well with Touch screens, with a mouse, and also with Mouse and Keyboard together. Various keyboard shortcuts are described in the *"Help Menu - Fast Keyboard Navigation"*.

SchoolWrite installation is easy. Local computer support personnel are able to install the software. The installation process will not make any changes to the system files, the PATH, or the environment. It does make a few Registry entries to enable the Uninstall routine. SchoolWrite itself does not rely on any Registry entries. SchoolWrite requires less than 100MB of hard drive space.

Installation

A demonstration version of the software is first loaded. This becomes the live system when a valid User Registration Key for the school is entered. The User Registration Key is emailed from BBA Software.

The User Registration Key will activate the full system. The software will no longer be restricted as a demonstration system.

Microsoft Windows 10, Windows 8 and Windows 7

SchoolWrite is compatible with Windows 10, Windows 9 and Windows 7, including touch screens or Mouse control.

To accommodate Windows 7, 8 and 10 security enhancements SchoolWrite needs to be installed in a shared folder. The default installation is in C:\Users\Public\SW. If you install into this location there will not be any concerns about security or Users' permissions.

Another way is to access the Properties of the SW folder in any other location, and in the **Security** tab - change permissions for Users to 'Full control'

Files are frequently updated and created by SchoolWrite users, and it is necessary that all users have full rights ('full control') to the SW folder and the folders beneath.

Licensing

LICENCE STATEMENT

SchoolWrite is site-licensed for the exclusive use of the original purchaser for use in only one school, regardless of the number of computers or size of network.

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- OR
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Printout Requests

Every SchoolWrite printout may be tailored to your requirement by clicking on a few radio buttons, check boxes and drop down lists.

The screenshot shows a window titled "Family Listing" with a tab labeled "ESC=Quit". It contains several sections for configuring the printout:

- Select PARENT or STUDENT criteria:** Radio buttons for "Parent" (selected) and "Student".
- Parent selection criteria:** Drop-down menus for "Starting Parent code" (set to "BERGED") and "Ending Parent code" (set to "VICARD").
- Print lines of Family Notes:** A checkbox, currently unchecked.
- Select ONLY Parent categories:** Check boxes for "DEFPHT" and "ASSCON", both unchecked.
- Select Parents with students in:** Drop-down menus for "Starting Year", "Ending Year", and "Home Class", all currently empty.
- Print addresses:** Radio buttons for "Yes" (selected) and "No".
- Include Occupations:** Radio buttons for "Yes" and "No" (selected).
- Print Student Numbers:** Radio buttons for "Yes" and "No" (selected).

Below these sections is a text box with instructions: "This is a list of Parents and their children at school. If Addresses are to be printed, phone numbers, emails and additional addresses are also printed. Parents to be listed may be selected by their own criteria, or by the criteria of their children currently enrolled at school."

At the bottom, it shows "Printer: \\gbc-server\TOSHIBAblack" and three buttons: "F4 Print", "F5 Preview", and "F6 Change Printer".

Radio buttons determine items that are included or excluded from the report. eg **Print Student Numbers**. Sometimes they specify report layout options eg **Print shadow lines**.

Check boxes determine if a category is printed. eg **Print only Parent Categories** The boxes that are ticked indicate that the category **will** be printed.

Drop down lists are used to select one item out of the list eg **Starting Parent Code**.

SchoolWrite remembers report settings for next time. It remembers the settings by name / password at login time. If passwords are not being used, the remembered report settings are the same for all users.

F4 Print

The report is sent direct to the printer - either by clicking on this button or by hitting the **F4** key on the keyboard.

F5 Preview

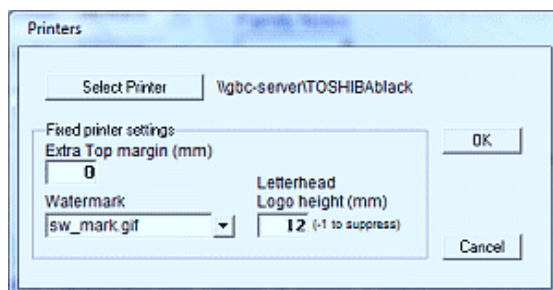
The report may be previewed, before sending it to the printer.

F6 Change Printer settings

Printer settings and printed graphics may be changed here.

Printer Settings

Whenever a printout is requested, **F6** allows change to printer settings.



Choose Printer - selects another printer attached to your computer or on the network.

Printer Settings which are fixed:

The following settings may be changed at any time, but remain fixed at the last setting.

Extra Top Margin

This is usually zero. The page margin automatically adjusts to the specification of your default printer in Windows.

If you adjust the top margin to bring the printout further down the page, ensure that the *bottom* of the report is also within the page margin.

Any change in this field will remain in place until you change it again.

Printed Graphics

Watermark

A watermark graphic will be printed in the middle of the page. The school logo or crest may be used here. The graphic file (.bmp, .jpg, .gif) should be placed in the SchoolWrite folder (directory). Ensure that the graphic to be used for a watermark is saved as a very (**very**) faint image. This is done in any graphics image editor.

The watermark option may be turned off by selecting **none** at the top of the drop down list of graphics files.

Any change in this field will remain in place until you change it again.

Letterhead Logo height

The letterhead logo is placed at the top left of each SchoolWrite page. The *height* of the logo (in mm) is entered here. 12mm is default.

The logo feature may be turned **off** by entering **-1** for the height.

The letterhead logo is selected in the **Miscellaneous Menu - Letterhead Graphics**. A graphic file of the school crest or any other logo is placed in the SchoolWrite folder (directory). The letterhead logo may be any standard graphic file (.bmp, .jpg, .gif) of any size. Images may be colour or monochrome.

Any change in this field will remain in place until you change it again.

Previewing reports

A feature of SchoolWrite is the ability to **preview** a report or a printout. A printout, whether long or short, may be previewed one page at a time. If the first preview page does not show the required information, the report may be abandoned. If the information is correct, the report may be sent to the printer.

If a hard copy is not required, the preview can be exited. The preview feature provides a saving of time and paper.

SchoolWrite Demonstration
SchoolWrite
Family Listing
PAGE 1

Code Parent Details Telephone Contact Details
Student Name D.O.B. Yr Cl House

Parent Code: **BERGEG**
Mr & Mrs G. Berger
73 WASHINGTON RD
BENLEY 2556

Father Work - Auburn Hospd 9523 1624
Mother Work - Clarke Bros 9342 0264
Mavis Smith Aunt 024655 5352
John Peabody Friend 9624 3032
Mrs Jones Aunt 9324 2524
Father Mobile 0402 222 324
Father-Wk gbb@interlink.com
Family icebergs@telcom.net

Parent Names: Father GEORGE BERGER Mother JEAN BERGER

1ST ADDITIONAL ADDRESS
Mrs Joy Berger
121 Hornel Avenue
HORNSBY 2177
Ex wife-has full access to children

© (Mary) BERGER 04/04/1987 12 1 ABRAHAM
Peter BERGER 02/04/1989 10 1 ABRAHAM

Parent Code: **BORKMP**
Mr & Mrs P. Borkman
33 DAMPIER RD
WENTWORTH 2445

Mother & Father Home 9531 4244
Father Work 9423 7894
Father Mobile 0417 947 833
Father Fax 9423 7854
Family bork@aol.com

Parent Names: Father PETER BORKMAN Mother IRENE BORKMAN

The controls for the Preview are on the right hand side of the screen.

Continue

'Continue' will advance the preview by one page. 'Run' will *run* to the end of the printout (page *numbers* will be seen incrementing in the Page box). 'Quit' will finish the report at the current page.

Zoom

The preview size may be zoomed *in* or *out* with the **+** and **-** keys, or by a left click (zoom in) or right click (zoom out) with the mouse. The levels of zoom are 0 to 8. Level 0 displays the whole page, but it may be too small to be readable. Level 8 is larger than life, and scrolling will be necessary to read it all. Level 3 is default for the first Preview. Subsequent Previews stay at the last Zoom level.

Scrolling

The visible page is scrolled by *dragging* the cursor up, down, left or right. The page may also be scrolled with the arrow keys. **PgUp** and **PgDn** keys will scroll up and down in big jumps.

Page Navigation

Navigation is available through those pages which have already been displayed. The < and > keys (or mouse clicks on those buttons) navigate forwards and backwards.

For pages still to be printed, the **Continue** button is used.

Print Options

Individual pages, or a range of pages, may be sent to the printer from the middle of a preview.

The key **P** will print specified pages. The key **A** prints all pages; the key **U** prints the current page; **E** specifies a range of pages to be printed.

The **number of copies** may be set prior to clicking on the **Print** button.

Show Margin

Clicking on this button will display a dotted line around the printout. This is the defined print area for the page, for your default printer. Different printers have different print margins. The dotted line accurately displays the area that will be printed.

Installing on the hard disk

The SchoolWrite system you have received has been written to self-install on any computer under Windows WINDOWS 95 / 98 / ME / NT / 2000 / XP / Vista / Windows 7 / Windows 8 operating system.

Please make sure that your computer has been turned on and booted correctly. SchoolWrite is provided as a self-installing file **sw34set.exe**. Run the **sw34set.exe** file from any location on your computer system or network. During installation, you will be asked to confirm the folder where you want to have the SchoolWrite system permanently located. The default location is the **C:\Users\Public\SW** folder on the hard disk, but you may place it anywhere on your hard disk or network. For Windows 7 and Windows 8 we recommend that you use C:\Users\Public\SW

During installation, the following information is required. It is important to accurately set-up the number of terms, term dates, and start of financial year. SchoolWrite uses this information to allocate databases and initial setup information.

Setup

ESC=Quit

Please enter details

Date preference
☒ dd/mm/yyyy ☐ mm/dd/yyyy

These details are important settings in SchoolWrite.
They can be changed later in Miscellaneous Menu -
Control Information

Terms per year 3

Term 1 commencement date 01/09/2009

Term 2 commencement date 01/01/2010

Term 3 commencement date 01/04/2010

Term 4 commencement date / /

School Name St Margarets School

School Address PO Box 123, Newtown

School email address admin@smg.co.nz

Start of Financial Year 01/09/2009

F4 Proceed

This information is also requested when Registering and re-registering SchoolWrite modules. The information should be kept up-to-date.

Support is available for problems encountered while running SchoolWrite. A current backup should be created within the SchoolWrite menu (*File Menu - Backup & Restore*). The backup file created is a compressed .zip file, and includes a file called **diags.txt** which is automatically created in the SchoolWrite folder. The backup .zip file should be attached to an email and sent to BBA Software at support@schoolwrite.com, requesting help.

Network installation:

Instal SchoolWrite JUST ONCE - on one computer, in folder C:\Users\Public\SW. In school admin offices, a peer-to-peer network is most common, where there is no "Server" - so it does not matter on which computer SchoolWrite is installed. It is best to install it on (a) the most secure computer, (b) the fastest computer. In a Client-Server network, install on the Server.

"Map" the network drive on all workstations, so that the workstation "sees" the SchoolWrite

computer as Drive F (or Drive X, or Drive Z, etc).

SchoolWrite icon:

Create an icon targetting (eg) **F:\Users\Public\SW\SW3.EXE**.

It is common for all workstations in the school office to have a SchoolWrite icon, and possibly some other senior staff workstations.

Intranet:

To create the SchoolWrite Intranet as the Home Page on the Browser of a workstation;

a) open the Browser,

b) type in the Address box (eg): **file:///F:\Users\Public\SW\intranet.htm**

c) Now select Tools Menu - Internet options - Use Current (to change the page you use for your home page)

It is common for most computers on the school admin network to have access to the Intranet via the Browser.

Payroll icon:

Create an icon targetting (eg) **F:\Users\Public\SW\SW3PAY.EXE**

It is common for for just one or two workstations to be allowed access to the Payroll.

Default printer:

Each workstation must have a default printer defined - either a network printer or a local printer. SchoolWrite on a workstation needs at least a default printer (which may be different for different workstations). All other network printers available for selection from a workstation are also available for selection from SchoolWrite.

Initialising Data Files

This is a hidden Option

This option is only used if test data is to be removed, prior to a fresh start. **This option destroys data!**

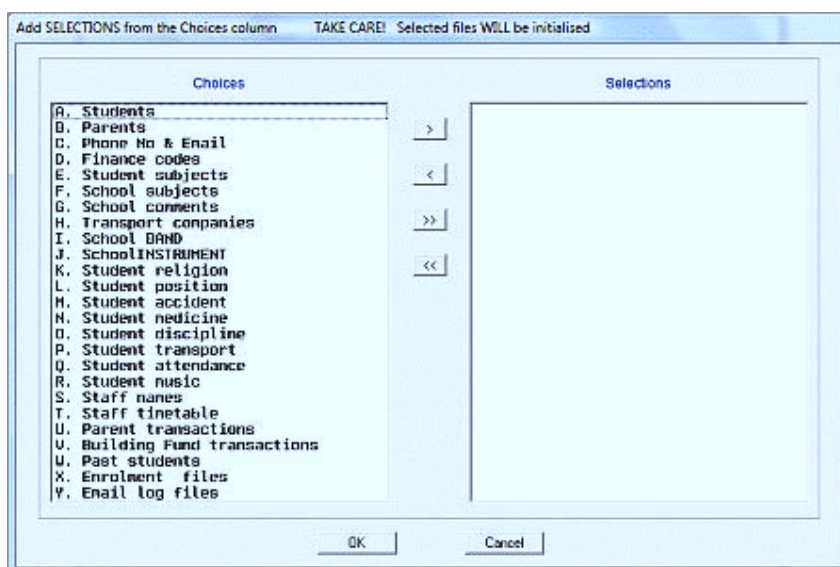
Select the Miscellaneous Menu - Control Information. Whilst in the Control Information screen, hit **ALT/F1** (both keys together). A warning message says:

Data File Initialisations (selective)

These options will LOSE data

Do you want to continue (Y/N)?

You continue at your own risk. The options that follow allow you to initialize the SchoolWrite data files - or ALL of them. The initialisation is only used after running test data through the system, and then preparing for a fresh start.



Data files to be initialised should be high-lighted on the left. Click on the right arrow (>) to transfer the file name from the left to the right of the screen.

Multiple files may be transferred to the right hand side of the screen, if more than one file is to be initialised.

If **all** data files are to be initialised, click on the double-right arrow (>>).

When the right hand side of the screen (**selections**) is correct, click on the **OK** button. Data will be initialised.

To exit this screen without initialising click the **Cancel** button.

Profile & General setup

The SchoolWrite Control Information screens can be accessed and modified by selecting **Miscellaneous Menu -Control Information**.

Profile setup

Students setup

Term 1-4 commencement dates

This indicates to the system which Term is current. The current Term is automatically determined from the Processing date, and menu screens show the current term and year on the top line. If you have only 2 or 3 terms or semesters per year, leave the last commencement date(s) BLANK.

If NO TERM or SEMESTER breaks are required in the academic year, then enter any date in the last year of the century (2099) in Term 2 commencement date. Enter the start of the academic year in Term 1 commencement date.

Boys/Girls/Co- ed (B/G/C)

If C for Co-ed is entered here, each student screen will ask for the sex of the student. Class lists will show the total of Males and the total of Females. If B for Boys or G for Girls is entered, the student screen does not ask for sex to be indicated. Class lists show the total of students, without a break-up between Males and Females.

Student optional activity 1 & 2 names:

There are two user-defined Student Activities in the system. This is where they are defined. To activate a Student Activity, simply key in a name for the activity (in 7 characters or less). eg FFPOSS, LIBRARY (could also be used for CADETS, BOARDERS, etc.) Usually these activities are NOT used to refer to curricular subjects or extra-curricular subjects, since these are covered in the students' subjects areas. Activities are used to refer to more general school activities ... for which listings can be generated, and for which charges may be made. If these activities are left blank, the system assumes they are not used. If one or both of the Student Activities is used, they are referred to in the following areas of SchoolWrite: On the Student Details Screen: The Activities are shown and a response of 'Y' or 'N' is given. On

Parents setup

Overdue Period on Statements (days)

The Parents' Fees Statement will optionally break up the outstanding balance between **Current** and **Overdue**. A given number of days entered here will determine what the **current period** is eg 30 days. The total of outstanding amounts older than this period is shown as **Overdue**. If '0' is entered, NO Overdue or Current break up is done and a single outstanding total is printed.

Interest rate on overdue fees (% pa)

Automatic calculation of interest on Parents' overdue fees may be performed by the system (if the Parent record is marked for paying interest). See **Parents Menu - School Fees Menu - Charge Interest**. When interest is calculated by the system, this percentage is used.

Interest free period - in days

As part of the calculation of interest on Parents' overdue fees, this interest free period may be set.

Statements - Balance Forward (Y/N)

The Parents' Fees Statement will show **all** previous unpaid transactions when this option is set to 'N'. This is similar to an 'Open Item' system. If this option is set to 'Y', then all transactions for a Parent that have previously been printed on a Statement are added into a single Balance Forward amount. The Statement prints the Balance Forward amount, followed by all new (unprinted) transaction

the Student Reports Menu: A Listing of all students doing one or other, or both of the Activities may be printed. In the Automatic Fees Billing process: Parents may be automatically charged for students doing an Activity.

Student Report Category & Sub-Category:

There is a user-defined category to which students can be assigned. By default, the name of this category is BAND, and students who are members of school Bands and Orchestras are assigned to a particular Band. Within the user-defined category, there is a user-defined sub-category. By default, the name of the sub-category is INSTRUMENT, and students who have been assigned to Bands may also be assigned an Instrument. The user-defined names may be changed on this screen to any pair of 10-character names, eg: ORCHESTRA / INSTRUMENT, TEAM / POSITION, CLUB / TITLE, SPORTS / TEAM In the Menu of Student Reports, there is a Report option which will print a list of students who are members of the Report Category (eg Orchestra members). It will also print a list of students assigned to a range of sub-categories (eg PER1 - PER2 for a list of all Percussion group members).

Student Name added to Fees Transactions

The Student name is added to the description column of transactions on the Fees Statement:

- for Tuition Fees transactions only
- Always - for all transactions, including Tuition Fees and extra charges
- Never - Student names are excluded from all transaction descriptions

Religion P, C, J or W

Protestant Catholic Jewish Welfare

A Protestant screen shows details of church attended, Baptism, Confirmation and Youth Group.
A Catholic screen shows details of Parish church, Baptism, Confirmation, Reconciliation and Eucharist.
A Jewish screen shows details of Synagogue attended, Bat Mitzvah or Bar Mitzvah and Youth Group.
A Student Welfare screen shows details of Passports, Visas, Permanent Residency, Medicare number, and Soc.Sec details.

Parent Optional category 1 & 2 names

There are two user-defined Parent categories in the system. This is where they are defined. To activate a Parent category, simply key in a name for the category (in 7 characters or less). eg DEF PMT, ASSOON (Deferred Payment, Association member, etc). On the Parent enquiry screen, each defined category is a 'Y' or a 'N'. When Parent printouts are requested (eg Parent lists, or Outstanding Accounts listings), the option is given to print just those parents in one of the defined categories.

Student picture auto display size

The picture on the Student Details Screen will automatically display if it is less than or equal to the specified kilo bytes. This default size for automatic display (if nothing is entered here) is 150 kb - the size of a large thumb nail photo.
If the auto display size is too big, the speed slows down when moving from one student screen to the next. The typical size of a picture taken with a digital camera or cell phone may be too

Past Student optional category name

There is one user-defined Past Student category (7 characters or less) displayed on the Past Student Details screen. eg MEMBER (Alumni Association member). On the Past Student Details screen this category is a 'Y' or a 'N'. Past Student printouts include an option for this Category - ie to print just those Past Students with a 'Y' in this Category.

big and pictures may require re-sizing..
 When a picture exceeds the auto display size, a LOAD button is displayed on the Student Details screen instead of the picture - this enables manual display of large photos.

:

General setup

Date: 1=dd/mm/yy 2=mm/dd/yy	Australian and European dates are displayed and input when the answer here is '1'. American dates are used when the answer is '2', and also Americanized spelling is given in the printed manual, for screen messages, and on screen help.
Postcode: 1=numeric 2=alpha (1/2):	<p>You may leave this field blank for the Windows currency setting to take effect (This is especially useful if currency symbol is more than one character). See Windows <i>Control Panel - Regional and Language Options</i>. Click on Customize - Currency Tab. Type in the <i>Currency Symbol</i> for your country.</p> <p>When checking the input of Postcodes, the screen will force numeric only if the answer here is 1. If the answer is '2', any character is allowed to be keyed for a Postcode. (Australia and USA, enter '1').</p>
Length of Postcode:	<p>The standard length of your country's Postcodes is entered here (eg 4 for Australia, 5 for USA). The maximum length is 10.</p>
European numeric format (E):	<p>This field may either be blank or E. The setting controls the format of numeric fields in all printouts and screens. eg: European format f1 234 567,00 D12 495,60 12,60% Non-European format \$1,234,567.00 \$12,495.60 12.60%</p>
Student Names: First/Middle:	<p>This field may either be Yes or No. The setting controls the heading on the Student Details Screen - where the names after the surname are FIRST NAME & MIDDLE NAME (especially available for African countries). The default titles are PREFERRED NAME & FORMAL NAME</p>

Account Numbers setup

The SchoolWrite Control Information screens can be accessed and modified by selecting ·
Miscellaneous Menu ·Control Information.

Account Numbers

Parents opening balance	Parents opening balance : Usually this balance is left at zero at the start of the system. At each END OF YEAR, the SchoolWrite system automatically replaces this figure with the total of Brought Forward balances. Any fees amounts outstanding at the commencement of the SchoolWrite system are usually introduced as Journal transactions. These entries will automatically update the following two balances:
Parents YTD debits	Usually this balance is left at zero. The figure will automatically increase as entries are made into the system.
Parents YTD credits	Usually this balance is left at zero. The figure will automatically increase as entries are made into the system. The sum of the above three balances should be checked periodically against the final totals of the Parents' Aged Trial Balance. The outstanding total should agree with this figure. The total of the above two balances should reconcile with the Parent Debtors balance in your Ledger or bookkeeping system.
BF opening balance	(BF - <i>Building Fund</i>) Usually the total balance to date of Building Fund donations is entered here. At end of year in the SchoolWrite system this figure is automatically incremented with the total of Building Fund donations receipted into the system for the year finishing. This figure should reconcile with the total of Building Fund donations in your General Ledger or bookkeeping system.
BF YTD contributions	BF YTD contributions: (BF - <i>Building Fund</i>) Usually this balance is left at zero. The figure will automatically increase as Parents' Building Fund donations are banked in the SchoolWrite system.
No. of bank dep req	This entry determines the number of BANK DEPOSIT SLIPS printed by the system when completing a series of Banking entries. If two Bank Deposit Slips are required (one for the Bank and one for your file) enter 2 here.
Main bank A/C	This is the ACCOUNT NUMBER of the main Bank Account ... ie the number as recorded at the Bank. This number is printed on the Bank Deposit Slip against the total of deposits to the Main Account (excluding Building Fund totals).
Donation Fund 1 Name & Donation Fund 2 Name	Two <i>separate funds</i> may be used while banking receipts from parents. Moneys into these funds are usually regarded as <i>separate</i> to the parents' fees owing (this is optional). Such a fund is usually a school Building Fund or a Parents & Citizens Fund . Moneys banked into this fund go into a separate bank account. The Fund Names may be entered here, and these names will be the reference to the fund throughout all SchoolWrite screens and reports from this point on. All references in this manual will be to "Building Fund", although you may set your own name to 'Library Fund', 'Parents & Friends' or 'P & C', etc. The General Ledger Account numbers which refer to this fund are set up on this same screen (Building Fund Bank Account No, GL Building Fund Donations A/c & GL Building Fund Bank A/c). A Sub-menu for each activated Fund is present in the Parents Menu, and Receipts into the Fund can be viewed and printed from this sub-menu. <u>Option:</u> Building Fund and Library Fund receipts may be included in Parents' School Fees statements when the option (<u>Fund1/Fund2 Receipts reduce School Fees balance?</u> below) is ticked. This option is instead of a separate ledger of Receipts, and when the option (below) is ticked, there will not be a separate Sub-Menu for the Fund.
Donation Fund 1 Bank A/C & Donation Fund 2 Bank A/c	These are the account numbers of (eg) the Building Fund Bank Account and (eg) the Library Fund Bank Account ... ie the numbers as recorded at the Bank. These numbers are printed on the Bank Deposit Slip against the total of the deposits for each Fund.
GL Bank A/C	This is the four-digit General Ledger Account number assigned to your Bank (Asset account

GL Debtors A/C	This is the four-digit General Ledger Account number assigned to your Parent Debtors Account.
GL Family Discounts	This is the four-digit General Ledger Account number assigned to which Family discounts are posted.
GL Fund 1 Donation A/c	This is the four-digit General Ledger Account number assigned to your (eg) Building Fund (Income) account.

Fund1 receipts reduce School Fees balance? : This option changes the way Receipts are handled in School Fees - Enter Money Received. When money received is entered for Fund1, it will be deducted from the Fees Balance Owing *when this option is ticked*. Money received for this Fund can also be seen in a separate Menu option for viewing and printing Receipts (see "Donation Fund 1 Name" above).

GL Don Fund 1 Bank A/c	This is the four-digit General Ledger Account number assigned to your (eg) Building Fund Bank (Asset) Account.
GL Fund 2 Donation A/c	This is the four-digit General Ledger Account number assigned to your (eg) Library Fund (Income) account.

Fund2 receipts reduce School Fees balance? : This option changes the way Receipts are handled in School Fees - Enter Money Received. When money received is entered for Fund2, it will be deducted from the Fees Balance Owing *when this option is ticked*. Money received for this Fund can also be seen in a separate Menu option for viewing and printing Receipts (see "Donation Fund 2 Name" above).

GL Don Fund 2 Bank A/c	This is the four-digit General Ledger Account number assigned to your (eg) Library Fund Bank (Asset) Account.
GL Interest Account	This is the four-digit General Ledger Account number assigned to your Interest Received Income Account.
Unit of currency	This is the currency symbol for your country eg \$ or £. You may leave this field blank for the Windows currency setting to take effect (eg if currency symbol is more than one character).
Goods/Service Tax %	The <i>rate</i> of tax applicable to your country or state should be entered here (eg 8.45). Tax is calculated, at this rate, <i>on total charges</i> accumulated in each Automatic Fees Billing Run
Sales/Svces Tax A/c	This is the four-digit General Ledger Account number assigned to Tax amounts charged.

Each General Ledger Account Number referenced on the above screen needs to have a corresponding entry in **Finance Codes**. The Finance Codes have the same code or number as the General Ledger code. The Finance Code describes more detail about the Parent charges or discounts that refer to this code.

Note: If you are using a manual bookkeeping system, it is suggested that the *Account numbers* (Finance Codes) that you use should be the *column numbers* in your ledger. All General Ledger Account Numbers on the above screen **should** have a corresponding entry in Finance Codes. Finance Codes are maintained either in **Parents - School Fees** Menu or in the **General Ledger module**.

Activate 2nd Currency Fees Menu	A second currency (eg US\$) may be used for billing of school fees and banking, in a currency different to that of the main school fees menu. When Y is entered, an <u>extra</u> Fees Sub-Menu will appear under <i>Parents Menu</i> (after exiting SchoolWrite and restarting).
Name of 2nd Currency	This is the three-letter name assigned to the second currency - eg USD, or US\$. This name will be used on all menus and printouts referring to the second currency.

Sports Houses setup

The SchoolWrite Control Information screens can be accessed and modified by selecting ·
Miscellaneous Menu ·Control Information.

Sports Houses Setup

Each Student is allocated to a Sports House, numbered 1 to 9. On this screen the Houses are given their names. Each Student may also be allocated to a Tutor Group (or a Pastoral Care Group), numbered 1 to 9. Tutor Groups are allocated names on this screen.

If Tutor Groups (or Pastoral Care Groups) are not used in the school, leave all names blank. If **no** Tutor Group names are entered here, then **no** further reference is made to Tutor Groups throughout the system.

Staff Members may be allocated to a Sports House and to a Tutor Group (see ***Miscellaneous Menu - Miscellaneous Files - Teachers***). When allocated, the Teacher's name is included in House Lists and Tutor Group Lists.

Fees setup

The SchoolWrite Control Information screens can be accessed and modified by selecting **Miscellaneous Menu -Control Information**.

Fees

Control Information		SchoolWrite Demonstration		Control Information				
ESC=Save & Quit		Setup information is seldom changed. Some items are updated at the start of each school year						
General		Scale/Theme		Basic names				
Profile		Account numbers		Mentor Group				
Institution		Courses & Fees		Discounts				
A school fees amount must be allocated to each valid school Course. Enter CODES for Courses 13-20 - usually allocated to Kinder & pre-school Courses. Automatic promotion of students flows from 1 to 2 ...etc... 11 to 12, 13 to 14 ...etc... 20 to 1								
School Fees	Special Fees	Disc	General Ledger Account Numbers					
Amount	Amount		FEE	SPEC	SCHL	BURS	DISC	
Course 1	100.00	Y	110	120	160	170	130	
Course 2	200.00	Y	110	120	160	170	130	
Course 3	300.00	Y	110	120	160	170	130	
Course 4	400.00	Y	110	120	160	170	130	
Course 5	500.00	Y	110	120	160	170	130	
Course 6	600.00	Y	110	120	160	170	130	
Course 7	700.00	Y	110	120	160	170	130	
Course 8	800.00	Y	110	120	160	170	130	
Course 9	900.00	Y	110	120	160	170	130	
Course 10	1000.00	Y	110	120	160	170	130	
Course 11	1100.00	Y	110	120	160	170	130	
Course 12	1200.00	Y	110	120	160	170	130	
13		N						

The Fees setup screen shows the school fees applicable to each school year. Automatic Fees Billing will work out the fees to be charged to each student from this table. The Term Fees for each school year should be set up in column 2 above. The third column is for SPECIAL FEES (on top of Term Fees) which may be charged for nominated school years. Eg, Year 10 students could be charged \$1,000 for Term Fees and \$100 for Special Fees, with possible discounts being applied to the Special Fees (note: discounts are **always** applied to Term Fees, but other fees and charges **may** be excluded from discounts). Year 9 students could be charged \$900 for Term Fees and NO Special Fees.

Column 4 indicates if discounts are to apply to special fees for each school year. It is important to include a TERM FEES AMOUNT against each school year that is applicable to your school (even if you are not using the Automatic Fees Billing options). For each school year, ensure that a non-zero fees amount is showing. If you have Kindergarten and pre-school years, they can be placed on lines 13 to 20, with a non-zero term fees amount. On lines 13 to 20, you may allocate your own name/code, eg 'K' for Kindergarten, or 'P2' for pre-school 2 days per week, 'P3' for pre-school 3 days per week, etc.

GL Fees Discount A/c: This is the four-digit General Ledger Account (column 9) number assigned to your Fees Discount Expense Account. SIBLING discounts on school fees and on optional extra charges are debited to this account number.

GL Fees account: (column 5) This is the four-digit General Ledger Account number assigned to Fees Income.

GL Special Fees account: (column 6) This is the four-digit General Ledger Account number assigned to Special Fees Income.

GL Scholarship account: (column 7) This is the four-digit General Ledger Account number assigned to your Scholarship Expense Account. Scholarship credits given to individual students are debited to this account number.

GL Bursary This is the four-digit General Ledger Account number assigned to your Bursary

account: (column 8)

Expense Account. Bursary credits given to individual students are debited to this account number.

GL Fees Discount account: (column 9)

This is the four-digit General Ledger Account number assigned to your Fees Discount Expense Account. SIBLING discounts on school fees and on optional extra charges are debited to this account number.

Discounts setup

The SchoolWrite Control Information screens can be accessed and modified by selecting **Miscellaneous Menu - Control Information**.

Discounts

Control Information SchoolWrite Demonstration

ESC-Save & Quit Control Information

Setup information is seldom changed. Some items are updated at the start of each school year.

Profile Account numbers Mentor Group
General Scale/Theme Basic names
Institution Courses & Fees Discounts

Discounts will be applied to all student's fees during automatic fees billing
ie discountable fees will be discounted.

Select automatic DISCOUNT METHOD
☒ Discount % on each student ☐ Family Discount ☐ Sibling Discount

Discount % on each sibling

Discounts for each student are applied to their own charges.

First sibling	0.00 %
Second sibling	10.00 %
Third sibling	20.00 %
Fourth sibling	30.00 %
Fifth sibling	40.00 %
Sixth sibling	50.00 %
Seventh sibling	60.00 %
Eighth sibling	70.00 %
Ninth sibling	80.00 %

Family Discount

Family Discount 10.00 %

Sibling Discount

Sibling Discount 0.00

Cumulative per Sibling ☒

Discounts on Parents' Fees may be granted in one of three methods. The above screen describes them.

On the left hand side of the screen - **Method 1 - Discount % on each child**. The percentage discounts for siblings at the school may be entered. When fees are billed, the first child's charges are debited without discount; the second child's charges are shown in full and then the appropriate discount is entered as a credit; the third child's charges are shown in full, and the appropriate discount is credited.

Note 1: the % discount for the first child is always 0%. Any percentage figure here is ignored, since the discounts only apply to multiple children - AFTER THE FIRST.

Note 2: The 'first child' is always the oldest. Discounts are then applied to children in descending age order.

On the top right hand side of the screen - **Method 2- Family Discount** - there is only one multiple child discount entry for the family .. calculated as the number of children minus one, multiplied by the Family Discount %.

The discount method that corresponds to your school's fees structure should be chosen. If you do not grant any fees discounts, set all % figures to 0, and set the discount method to '**Family Discount**'.

On the bottom right hand side of the screen - **Method 3 - Sibling Discount**. The discount *amount* for siblings at the school may be entered here. When fees are billed, the first child's charges are debited without discount; the second child's charges are shown in full and then the appropriate discount is entered as a credit; the third child's charges are shown in full, and the appropriate discount is credited.

Note 1: the discount amount for the first child is always \$0. Sibling discounts only apply to

multiple children - AFTER THE FIRST.

Note 2: The 'first child' is always the oldest. Discounts are then applied to children in descending age order.

Note 3: Cumulative per Sibling - when this is set to **Y**, the *discount amount* increases for each additional sibling. Eg When the discount amount is set to \$10 the 1st (oldest) child in the family has **no** discount, the 2nd child receives \$10 discount, the 3rd child receives \$20 discount, the 4th \$30, etc.

The following is an example of entries in a Parent's Statement as a result of using DISCOUNT OPTION 1 above:

PARTICULARS	DEBIT	CREDIT
08/07/2010 FEES Year 12 Mary	1,200.00	
08/07/2010 FEES Year 10 Peta	1,000.00	
08/07/2010 DISCOUNT Peta		100.00
08/07/2010 FEES Year 9 John	900.00	
08/07/2010 DISCOUNT John		180.00

The following is an example of entries in a Parent's Statement as a result of using DISCOUNT OPTION 2 above:

PARTICULARS	DEBIT	CREDIT
08/07/2010 FEES Year 12 Mary	1,200.00	
08/07/2010 FEES Year 10 Peta	1,000.00	
08/07/2010 FEES Year 9 John	900.00	
08/07/2010 DISCOUNT Family Discount		310.00

The following is an example of entries in a Parent's Statement as a result of using DISCOUNT OPTION 3 above:

PARTICULARS	DEBIT	CREDIT
08/07/2010 FEES Year 12 Mary	1,200.00	
08/07/2010 FEES Year 10 Peta	1,000.00	
08/07/2010 DISCOUNT Student discnt		10.00
08/07/2010 FEES Year 9 John	900.00	
08/07/2010 DISCOUNT Student discnt		20.00

Institution Setup (Internal Codes)

The SchoolWrite Control Information screens can be accessed and modified by selecting **Miscellaneous Menu -Control Information**.

Institution

System Title	The name which appears on all printouts and reports, underneath the Registered school name. .
Address line 1 & 2	This address is printed in the Remittance section of Parents Fees Statements.
Trans No. - School Fees	This number is used internally by SchoolWrite, and is usually set to 1 at commencement..
Next Building Fund Receipt no.	This is set to your NEXT Building Fund Receipt Number. If transferring from another system, or from a manual receipt book, it is usual to follow on with the next receipt number.
Next Library Fund Receipt no.	This is set to your NEXT Library Fund Receipt Number.
SW Ledger GL transfer (Y/N)	An N indicates to the system to hold over General Ledger Posting details in a file on disk, for later pick-up by the SW Ledger system. Parent Billing transactions and Parent Banking transactions will generate these automatic transactions. If the SW Ledger system is installed, this should be answered Y . See Period End (with General Ledger Transfer).
Parent Statements on letterhead? (Y/N)	Y indicates to the system that Parent Statements will be produced on pre-printed letterhead. A 2 cm gap is to be left at the top of each page. N indicates that SchoolWrite should print letterhead at the top of each page. Letterhead details are set up in Miscellaneous Menu - Letterhead Graphics .
Parent Receipts on letterhead? (Y/N)	Y indicates to the system that Parent Receipts will be produced on pre-printed letterhead. A 2 cm gap is to be left at the top of each page. N indicates that SchoolWrite should print letterhead at the top of each page. Letterhead details are set up in Miscellaneous Menu - Letterhead Graphics .
Number of Receipts printed	This controls the number of receipts printed during school banking. If a 2nd office copy is required, enter 2 here. If no receipts are to be printed, enter zero .
Print Oldest Student Name on Receipts	This controls the printing on receipts of the name & Class of the oldest child at school - to facilitate hand-delivery of Receipts.
Next Student Number (auto allocated):	This is the Student's Registration Number . It is automatically allocated as new students are entered. You may start this number here as the next number from your previous system. It is a seven digit number. Some schools allocate a new number range each year, eg 2003001. In this case, the NEXT STUDENT NUMBER will need to be reset (here) at the start of each year, before entering new students..
End of Term Reports on letterhead? (Y/N)	Y indicates to the system that End-of-term reports will be produced on pre-printed letterhead. A 2 cm gap is to be left at the top of each page. N indicates that SchoolWrite should print letterhead at the top of each page. Letterhead details are set up in Miscellaneous Menu - Letterhead Graphics .
Next Enrolment Student Number	This number is used internally by SchoolWrite, and is usually set to 1 at commencement. The Enrolment number is totally independent from the Student Number.

Basic Names setup

The SchoolWrite Control Information screens can be accessed and modified by selecting ·
Miscellaneous Menu -Control Information.

Basic Names

This option is used to rename some of the standard headings used in SchoolWrite screens and printouts.

This allows for tertiary colleges to choose more appropriate names for their key areas.

Year / Grade	The name entered here replaces 'school year'/'grade' in a K-12 school. A tertiary college may use (eg) <u>Faculty</u> , or <u>Course</u> or <u>Section</u> . (Default = YEAR)
Home Class	The name entered here replaces 'Home Class' in a K-12 school. A tertiary college may use (eg) <u>Stream</u> , <u>Intake</u> , <u>Roll Group</u> . (Default = HOME CLASS)
Sports House	The name entered here replaces 'Sports House' in a K-12 school. A tertiary college may use (eg) <u>Mentor Group</u> , or <u>Admin Group</u> . These groups are assigned names, in the same way that Sports Houses are named in a K-12 school. The individual group names are assigned in the F5 (Houses) option of the Control Information Menu. (Default = HOUSE)
Tutor Group	The name entered here replaces 'Tutor Group' in a K-12 school. A tertiary college may use (eg) <u>Pastoral Grp</u> , or <u>Formation</u> . These groups are assigned names, in the same way that Tutor Groups are named in a K-12 school. The individual group names are assigned in the F5 (Houses) option of the Control Information Menu. (Default = TUTOR GROUP)
Parents/Debtors	The name entered here replaces 'Parent' in a K-12 school. A tertiary college may use (eg) <u>Debtor</u> , or <u>Member</u> . (Default = PARENT)
External Exam No	The name entered here replaces 'External Exam Number' in a K-12 school. A possible substitute may be (eg) <u>Certificate No.</u> , or <u>Locker Number</u> . (Default = External Exam Number)
Reset all names	When YES is entered here (followed by F4 SAVE), all of the above names are reset to their DEFAULT names. Default names are typically used by K-12 schools.
Course Names 1 - 20	There can be up to 20 Courses (or Faculties) The first 12 Courses have codes '1' to '12'. The other Courses are assigned your own 2-letter Code. A descriptive name may be entered for each Course. eg 'Certificate IV Hospitality'. To make these codes valid, a school Fee must be allocated in F6 (Fees) option of the Control Information Menu. If more Courses are required, tick the option " More course names? ". This will allocate more courses in groups of 10 (maximum 100).

Finance Codes setup

MAINTAIN FINANCE CODES screen is found in the School Fees Menu (Parents Menu). The screen displays the attributes of each finance code used in the Parents Fees billing area.

The **finance codes** (or **account numbers**) are referenced in the Control Information screen (Fees & Account Numbers).

FIELD DESCRIPTIONS

General ledger account number:

The School System interfaces to the General Ledger through the use of this number. A General Ledger account, and a finance code are the same thing. The screen shows *more* details for the account number here than it does in the General Ledger. This is because Parent fees billing has a number of criteria which do not come into the rest of the General Ledger system.

Description:

The description for this code prints on Parents' Statements and may be a little more 'user friendly' than the more formal accountancy terms given to General Ledger codes. eg 'Sundry Debtors' in the Ledger might be 'Parents' in the short description here.

Descriptions used in Parents fees Billing are the *short descriptions* whilst descriptions used in the General Ledger are the *long descriptions*. The General Ledger shows both descriptions in the maintenance of Finance codes (accounts).

Amount chargeable:

The attribute sets the standard charge for this finance code. This amount may be overridden at time of charging.

Can a discount apply to this extra charge (Y/N):

This indicates whether or not a discount can be applied when a charge is being made to this account in the automatic fees billing process. Discounts may be STUDENT Scholarships or Bursaries, SIBLING discounts or PARENT subsidies.

Is this a charge to students doing optional activities ?:

This attribute will only allow a corresponding charge to be debited to students who are doing SPECIAL ACTIVITY 1 or 2. These Activities are established in the School Profile setup screen, and for each student the Activities are either **Y** or **N**.

Is this charge to apply only once per parent?

eg school magazine. Answering '**Y**' to this attribute will ensure that this charge is applied only once to each parent regardless of the number of students currently attending.

Does this charge apply to Parents without students (Y/N):

Answering '**Y**' to this attribute means that this charge may be made to ALL parents on file, whether they have students at school or not. All other charges in automatic fees billing relate to students. Apart from this option, parents without a child at school would not receive any charges in an automatic billing run.

Is this a charge to parent in optional categories?

This attribute will only allow a corresponding charge to be made to parents who are shown as being in OPTIONAL CATEGORY 1 or 2. These categories are established in the School Profile Setup screen. For each Parent, the Activities are either **Y** or **N**.

Does Goods/Services Tax apply to this charge(Y/N)?

This question is asked only if the Goods/Service Tax % is set to a non-zero amount. See **Miscellaneous Menu - Control Information - A/c No's**. If Goods/Services Tax **does** apply to this charge, then it is automatically added to a total Goods/Services amount for the billing run that is added as a charge to the parent's account.

Total amount charged for this period to date:

This field displays the month to date accumulation for this particular finance code.

Getting Ready to use SchoolWrite

The first steps to getting ready to use SchoolWrite are:

- enter all STUDENT details
- enter all PARENT (or family) details

Each Student should be given a valid Parent Code, and brothers and sisters are given the same code. This ensures that families 'link up' correctly. There is a checking facility, which will inform you if you have any 'orphan' students ... ie students who do not correctly link up to a parent.

This check is found in the **Students Menu - Student Miscellaneous menu - Check Student Parent Link**.

Print lists of students, and Family lists to verify the accuracy of your data (see **Parent Menu - Printouts & Reports**, and **Student Menu - Printouts & Reports**).

There is a useful printout - the **Parents Verification Report** - which shows the full details for a family on one page. There is provision for a message to parents, so that the report can be sent home for verification.

Next steps depend on the modules of SchoolWrite being activated, and which functions will be performed first.

eg

- enter TEACHER codes and names
- enter all SUBJECT codes and names
- enter STUDENT SUBJECT SELECTIONS for the current Term

File Naming Conventions

File name conventions used within the SchoolWrite directory are:

Files that MUST BE backed up every day after changes are made:

- Main Data files : .dbf, .dbt, .dst
- Standard Letter files : .lpa, .lpt, .ltr

Files that DO NOT NEED to be backed up:

- Index files : .ntx (Index files self-create from the Miscellaneous Menu option INDEX ALL FILES)

These files DO NOT NEED daily backing up, since they never change:

- Program files: .exe, .dll
- Reference files : .\$.vl
- On-line documentation : .chm

NOTE: A complete copy of the SchoolWrite folder should be archived on a regular basis (eg at end of Semester and end of school year). Software can be re-downloaded (www.schoolwrite.com) so that SchoolWrite can be re-installed with your current data.

Files that SHOULD BE DELETED:

When SW Software program is terminated abnormally, eg by rebooting before terminating the program, or without shutting down Windows, or because of hardware failure, temporary files may be left in the SW directory...

- User temporary files : Unnnnnnn.dbf where nnnnnnn = numerics
- Unnnnnnn.dbt
- Unnnnnnn.ntx

The INDEX ALL FILES option automatically deletes these files.

Tour of SchoolWrite

Tour through the main processes of school administration.

- Academic records
- Start of school year
- School Fees Billing
- End of Term Report Cards
- Regular processes throughout the year

ACADEMIC RECORDS

Screens to become familiar with are:

Student Details *see Students Menu*

Parent Details *see Parents menu*

Past Student Details *see Past Students Menu*

Timetable Class Allocations *see Timetable Menu*

Future Enrolment Details *see Enrolments Menu*

ACCOUNTS

Screens to become familiar with are:

Enter Cheques Drawn - Enter Deposits - Enter Journals *see General Ledger Menu – Ledger Postings*

Print Finance Code Postings *see General Ledger menu – Printouts & Reports*

Creditors – enter invoices *see Creditors Menu - Enter Invoices*

Creditors Details & Invoices *see Creditors Menu – Creditors Details*

Employee Details *see Payroll - Maintenance Menu – Maintain Employees*

Enter Timesheets *see Payroll - Enter Timesheets Menu*

START OF SCHOOL YEAR

Printouts

Subject Class lists *Students Printouts - G (for subject teachers)*

Home Class lists *Students Printouts - A (for Form teachers)*

Age lists *Students Printouts - C (for sports teacher)*

Sports House lists *Students Printouts - B (for sports teacher)*

Student graphs *Students Graphs*

Timetable *Print Timetables- Students (for Students)*

Timetable *Print Timetables - Teachers (for Teachers)*

SCHOOL FEES BILLING

Fees may be billed at any desired interval – eg monthly, each term, once per year, etc.

Set standard fees *Miscellaneous - Control Information - F6 Fees*

Automatic Billing *Parents - School Fees Menu - Automatic Fees Billing*

Daily Banking *Parents - School Fees Menu - School Banking*

Parent Fees Statements *Parents - School Fees Menu - Print Statements*

Parent Standard Letters *Parents - Parent Standard Letters*

Parent Graphs *Parents - School Fees Menu - Fees Graphs*

END OF TERM REPORT CARDS

Teachers are given their classes to enter marks and comments for each student, away from the main administration computers. A software program (ReportWrite) is provided, along with their classes. Teachers may be given a USB Drive or a download location on the network, or a floppy disk.

ReportWrite downloads *ReportWrite Menu - download Teacher's classes*

.. *for subject teachers*

ReportWrite downloads *ReportWrite Menu - download Teacher's classes*

.. *for year coordinators)*

Teachers enter their comments & marks *Remote computer (Zip Disk, USB Drive or floppy)*

Upload marks & comments *ReportWrite Menu – upload Teacher's marks*

Print Report Cards *Students - Printouts & Reports - Option – P*

REGULAR PROCESSES THROUGH THE YEAR

Pay Creditors *Creditors Menu – select, browse & pay invoices*

Pay Staff Payroll – *Process Pays Menu - Pay employees*

Print Balance Sheet *General Ledger Menu - Printouts & Reports*

Print Profit & Loss *General Ledger Menu - Printouts & Reports*

Tailored Report *General Ledger Menu - Printouts - Financial Reporting*

- Maintain Financial Reports

- Print Financial Reports

Enrolment Statistics *Enrolments - Printouts & Reports - Count..*

Enrolment Details *Enrolments – Printouts & Reports - list*

Enrolment Letters *Enrolments – Enrolment Standard Letters*

Promote Students *Students - Student Miscellaneous Menu – Promote Students*

Roll over Future Enrolments *Enrolments Menu – Rollover to Student file*

Setting up Academic Records

Step by step Setup

Easy to follow steps for setting up **your** school data in SchoolWrite school administration software:

- Setup school static info
- Enrol new students
- Allocate home class teachers
- Link teachers to subjects
- Take on student subjects

Through the term (ReportWrite)

- Prepare teachers' USB Drives
- Input student marks on USB Drive
- Upload marks from USB Drive
- Calculate grade averages
- Print school reports
- End of Term processes
- Prepare next term
- Final term processing
- Transfer to past students

Step 1 - Setup School Static information

Select **Miscellaneous menu - Maintain misc.files**

Teachers(Add, Edit, Delete)

Subjects (Add, Edit, Delete)

Comments (Add, Edit, Delete)

Immunisation Doses (Add, Edit, Delete)*Set maximum doses for required immunisations*

Control Info. (Edit)*Set Term Dates, Fees, A/c numbers & Address*

Passwords(Add)*Set access levels for each user*

Select **Students menu - Student miscellaneous - Miscellaneous Student files**

Acc./Illness Codes(Add, Edit, Delete)*Set drop-down list options*

Treatment Codes(Add, Edit, Delete)*Set drop-down list options*

Discipline Codes(Add, Edit, Delete)*Set drop-down list options*

Attendance Codes(Add, Edit, Delete)*Set drop-down list options*

Band(Add, Edit, Delete)

Instrument(Add, Edit, Delete)

Step 2 - Enrol New Students

Select **Enrolment Menu - Enrolment Details**

a. Add, Edit, Delete Future Enrolments

Follow the screen prompts. **NB The mailing address must be entered.**

Note Enter as much information here as possible. Everything entered here is "rolled over" to Parents and Students.

b. Select **Enrolments Menu - Enrolments Standard Letters**

i. Maintain Standard Letters

ii. Print Letters

iii. Print Labels

c. Print Enrolment Lists

NB Do not continue without a backup.

d. Rollover to Student File

i. Matching Parent Codes

Set the criteria (eg Enrolment year) to match the data you wish to roll over. Normally it is sufficient to enter only the Enrolment Year and the Placement Code.

Check Matching Parent Code printout - which shows Enrolling Parent codes which match existing Parent codes. Ensure that matching codes **are** for the same family.

ii. Do Rollover Now - setting the same criteria (Enrolment year, etc).

Step 3 - Allocate Students to Home Classes

Select **Students Menu - Students Details**

a. Edit all new students, entering their home class.

b. Printouts and reports

A. Home class list ... **check this list**

Step 4 - Link Teachers to Subjects

Select **Timetable Menu - Timetable Allocations**

a. Add the Teacher's class (Subjects Year and Class)

b. Modify Periods - Add each Period number (& Room number) for that class

Note Every subject and class must be allocated to a teacher

c. **Timetable Menu - Print Timetables - List of Teacher Loads** ... check this list

Step 5 - Allocate Student Subjects

Select ***Students Menu - Student Miscellaneous - Prepare new term - Prepare Student Subjects***

Note It is often not practical to use 0 for all grades.

Enter Year or Grade

Enter Year (usually current)

Enter Term (usually current)

Enter Core subjects

Enter Home Class

Note Edit each core subject line with the appropriate compulsory subject code.

Now change Term and Year to the newly prepared Term - see ***Miscellaneous Menu - Change Term & Year***.

Add, Edit, Delete subjects for individual students.

Select ***Students Menu - Student Details*** - click on ***Subjects*** button

Step 6 - General Administration during Term

Keep your school records up to date by entering the necessary information, Eg. Discipline, Accident and Illness, Attendance..., whenever available.

Step 7 - Prepare ReportWrite for Teachers - on removeable media or on the network

Note The following procedure is for schools that wish to use remote computers to enter students marks.

Select ***ReportWrite Menu - Download Teacher's Classes***

1. Subject/Class Teacher
2. Enter teacher's code
3. Enter Starting year / Ending year / Home Class
4. Download to:
 - o USB Drive
 - o any location on the network

Step 8 - Input Student Marks - away from main administration computers

If the download location is a USB Drive:

Take the removeable media to a remote computer, and double-click on **RWRITE3** to start the program.

If the download location is on the network:

Select **ReportWrite Menu - Run ReportWrite at download location** ReportWrite may now be run on the network.

Step 9 -Upload Student Marks

The teacher's marks & comments are later uploaded to the main computer, using

ReportWrite Menu - Upload Teacher's Marks & Comments

Select **ReportWrite Menu - Mark Entry Control Report**. This produces a list of teachers' classes, showing what percentage of students have marks and comments entered. This is used to follow up teachers who need to upload their marks and comments.

Step 10 - Calculate Year/Grade Averages

Note Make sure all the marks are in.

Select **Students Menu - Student Miscellaneous - Average Student Marks**

To automatically average one subject:

Enter Year and Subject

Enter Class - or * (a single asterisk) to average over the whole school year.

Step 11 - Printing Standard School Reports

Select **Students Menu - Printouts and Reports - P. End of Term Reports**

End-of-Term Reports may be printed for one student (Enter name or student number) or for an entire school year, or for one Home Class.

Step 12 - End of Term Processing

Copy the entire SchoolWrite directory to a new (archive) directory. Add a new icon to access SchoolWrite in the archive directory, and name it ARCHIVE or TERM 1, etc.

Passwords can also be changed on the Archive copy, as a further reminder that this is only a copy, and not the current version of SchoolWrite:

Select **Miscellaneous menu - Passwords**

Note Don't forget the most important last step: Make a new backup set on removable media, label it 'END OF TERM X', and store it permanently.

Step 13 - Prepare Next Term

Select **Students Menu - Students Miscellaneous - Prepare new terms - Prepare Student Subjects**

Note: It is not practical to use 0 for all grades.

Enter Year/Grade

Enter Year (usually current)

Enter Term (usually current)

Enter Source Term to copy from

Enter Copy **all** subjects

Select **Students Menu - Students Miscellaneous - Update Class Sizes**

Select **Students Menu - Student Details** - click on **Subjects** button

Note: Make the necessary subject changes.

Repeat Step 6 - 13 as the year progresses.

Step 14 - Final Term Processing

Select **Students Menu - Student Miscellaneous - Promote Students**

Note: This will promote all students. use the following steps to edit students that must be held back.

Select **Students Menu - Student Details** -(Edit)

Note: Change the School Year to the previous year.

Step 15 - Transfer to Past Students

Students with a Withdrawal/Graduation date are transferred to Past Students.

All Students who have left school during the year should have their **date of leaving** entered under *Withdrawal/Graduation Date* - see Maintain Students - Registration Tab.

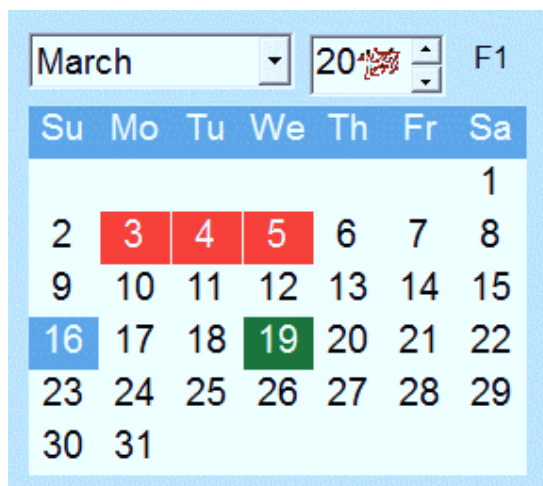
Students graduating from the final year of school have *automatically* had their **graduation date** entered via the **Promote Students** option (Step 14 above).

Select **Student Menu - Student Miscellaneous - Transfer graduates to Past Students**

Enter the final school year from which students usually graduate.

School Calendar

SchoolWrite has a built-in calendar with an integrated appointment tracker. This same Calendar is available to SchoolWrite Intranet browsers.



To edit, or view **appointments** double-click on the date in the calendar.

You may also edit or view appointments by selecting **File Menu - School calendar - Browse Calendar Dates**.

When the calendar first pops-up, the current month is displayed. The current day is highlighted in blue. Days in the month with appointments are shown with a green background. Holidays in the current month are shown with a red background.

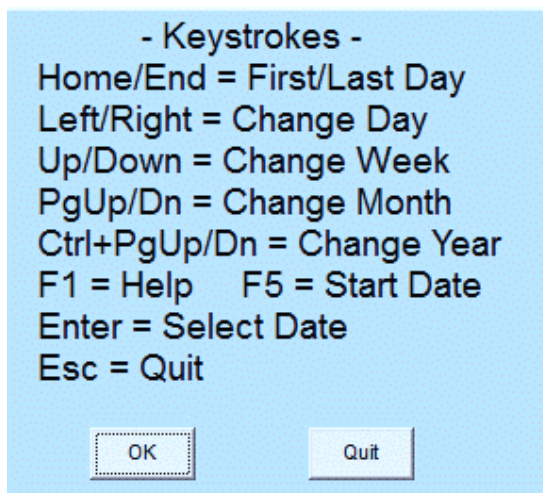
P>To edit, or view holidays select **File Menu - School calendar - Set Holiday Dates**.

The Calendar window:

The pop-up Calendar window stays on top of other windows on the screen, and is always visible.

To close the Calendar window, click anywhere on the Calendar and hit **Esc** key (or click on **F1** then click on **Quit**).

To Change Dates:



To move to different days in the month, hit the **Up/Down** or **Left/Right** keys, or click on the required date with the mouse.

To move to another month, hit the **PgUp/Dn** keys, or select another month from the Drop-down box

To move to another year, hit the **Ctrl+PgUp/Dn** keys, or select another year with the Up/Down arrows next to the year.

To move to the current date, hit the **F5** key.

Automatic intranet update:

All updates to the School Calendar are automatically updated on the Calendar available from the [SchoolWrite Intranet](#). The Intranet calendar is available in web browsers around the school. Months may be selected from the calendar by clicking anywhere on the month grid in the calendar. Details for all appointments are shown at the bottom of each month.

Intranet Calendar pages may be printed from the web browser using the **print** facility (eg Internet Explorer). This will print a summary of school appointments in the month.

Calculator and Notepad

Calculator

The Windows Calculator is available from ***File Menu - Calculator***

The Calculator may "disappear" behind SchoolWrite windows, but it can always be recalled from the *Task Bar*.

Notes

The Windows Notepad is available from ***File Menu - Notes***

Notes may be opened and saved to any location available to the computer work station. However, notes should be saved to the SchoolWrite folder if they are to be backed up along with other SchoolWrite data.

Backup and Restore data

Regular backups of your data are essential. In fact, **a new backup should be made every time you enter more information** - eg change of address, class or subject details, etc. On a day when SchoolWrite is used for obtaining lists and printouts only, there is no need to backup.

The menu option for backing up data files provides the benefit of compression. Only DATA files are backed up. Programs, and other items which do not change are not backed up, since they can be reinstalled from the original source.

The default name given to the compressed backup file is taken from the start of your registered SchoolWrite name, and the extension is .ZIP. You may select the location for your backup file - preferably on removable media (eg zip disk, floppy disk, CDROM-R, etc)

The screen displays the progress of the files being backed up.

At the end of the process, the screen shows the completed message (eg):

**Data backup completed
to F:\USB Drive**

It is recommended that **at least three** generations of backup sets are kept on removable media. Some will keep five - one for each day of the week. **In addition**, it is recommended that further backup sets be archived at the end of each each term, and at the end of each school year.

Backup sets that are created should be entered in a log book, showing date and time, and a brief description of the work most recently entered. eg

Backup set A	07/07/03	1600 hrs	Banking & changed addresses
--------------	----------	----------	-----------------------------

At the start of Backing up data, a diagnostic check of your computer system is made, and the results are stored in the file DIAGS.TXT. This information may be used by computer consultant to check for any problems with the hardware or settings of your computer.

When RESTORING data, the backup (.zip) file is selected from the location where it has been stored (eg on removable media).

The screen displays the progress of the files being restored. At the end of the process, the screen shows file indexing messages. When the last file has been indexed, the progress bars disappear from the screen. SchoolWrite is now ready to use.

Index Files

INDEX FILES

Select File Menu - Index Files

This is a disaster recovery option. If problems appear to exist with the order in which things are printed, or are shown on the screen, **then** is the time to select this option.

If any data files are copied into the SchoolWrite folder (directory), then this option should be selected. On a network, all users of SchoolWrite must first log out of SchoolWrite screens for this process to run.

The indexing option may take a few minutes. When it is complete, normal processing may proceed.

LOG FILE

A log is kept of all accesses to various parts of the SchoolWrite system. It is a self-purging log, with a maximum number of 2,000 entries. Each entry carries the time and date, as well as the name and password of the user.

This is a helpful error tracking tool, and is designed to assist support personnel in locating problems.

Access to the User Log by clicking on the **Logo** in the *About* SchoolWrite screen (**Select *Help Menu - About SchoolWrite***), or via a drop-down list, along with **INDEXING** of Files (see above). **Select *Miscellaneous Menu - Index Files - <Log File in drop down list>***

Check for Updates

Check for Program updates

If your internet connection is open, you may proceed with this menu option. A SchoolWrite internet screen will connect with the website to display the current download page.



Check on the internet screen for upgrades. Your current program version number is shown at the top of the screen.

You must exit from the SchoolWrite program before continuing with the program download in the internet screen. All other SchoolWrite users must also be logged out of SchoolWrite. Then you may proceed to click on the link alongside **Download SchoolWrite here**.

Installation of this software updates the SchoolWrite system, changing only the program and not the live data.

However, best practice is to **backup** the data prior to downloading updates.

When the download is complete, follow all default prompts to install the new version of software. When it is complete, the default option is **Run SchoolWrite**. At the top of the SchoolWrite window, the new Version number will be displayed.

Tailored Program

A SchoolWrite tailored program is prepared to the specification of each individual school that requests it.

The most frequent use is for printing report cards or statistical printouts in the format required by the school or college using SchoolWrite. The full range of SchoolWrite data is available, and printouts may draw from Students, current Timetable information, Parents and family information, Future Enrolments, Past Students, etc.

The tailored program may also be used to input data. It is possible to configure SchoolWrite's database to include extra fields for data input. These extra fields may then be used in printout options in the tailored program.

Sample Tailored Program

A sample tailored program is included with SchoolWrite software. There are two sample reports:

- End-of-Term Report with a different layout to the standard SchoolWrite report
- Home Class List with Subjects - showing subjects taken by students (with option of printing marks)

Extra tailored report options may add to the sample reports already on the menu, or replace them.

Specify Your Report

Requirements for your Tailored Report should be specified in an email, or in an attached document. The specification should also nominate Report Request Options (eg nominate if similar to a standard SW report) eg. select: Starting Year, Ending Year & Home Class

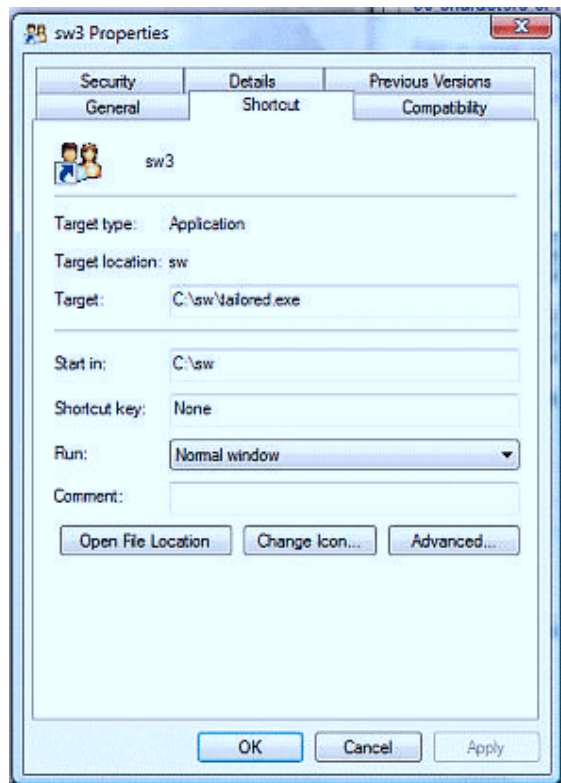
A sample of the required report should be emailed - Microsoft Word or Excel may be used for this, or a scanned image. The draft layout should have all entries filled in according to the way you wish the final report to appear. The fill-in data should match exactly at least one item in the current SchoolWrite database. Email the specification and the draft layout as an attachment to: support@schoolwrite.com along with the most recent SchoolWrite data backup (zip) file.

3-part specification required(summary)

- scanned image with corrections, & marks that exactly match the data backup
- document explaining the changes required
- SchoolWrite data backup

Running the Tailored Program

The tailored program is best accessed via a separate icon on the Desktop.



sample properties of icon

The tailored program may also be accessed from the **File** Menu of SchoolWrite. The full name [and path] of the tailored program must be placed in a text file in the SchoolWrite folder - **Tailored.\$VL**. This is an ASCII file and it should be created with a text editor such as Windows Notepad. The file has only one line, and should not have spaces or blanks embedded.

If the name of the [Path &] program in Tailored.\$VL is incorrect, the **Tailored program** option in the **File** Menu will not appear.

Examples of Tailored.\$VL:

- tailored.exe(the name of the program in the SchoolWrite folder)
- OR
- newtown_hs.exe

Export Student Details

These Export options are found in the **Files Menu - Export**

EXPORT STUDENT DETAILS

All current students, with their full details, are exported to a comma delimited (ASCII) file. The ASCII file may be imported into spreadsheets (Microsoft Excel), databases (Access), or it may be used as a mail-merge data source.

The default name of the file is FAMILY.CSV in the main SchoolWrite folder. This name and location may be changed.

Quick launch in Excel:

The exported .csv file may be opened up in Microsoft Excel by clicking on the button **Open in Excel**. Note: **F4 Export Now** should first be selected.

One line is exported per student. Siblings in the same family will have the same family address details exported for each sibling.

View Details - ie the fields of data (or Excel columns) that are exported:

<u>Field</u>	<u>Name</u>	<u>Format</u>	<u>Length</u>	<u>Comment</u>
01	Student Surname	Text	18	
02	Student Preferred Name	Text	14	
03	Student Formal Name	Text	14	
04	Student Number	Number	7	
05	Student School Year	Text	2	
06	Student Home Class	Text	2	
07	Student Sports House	Text	15	
08	Student Religion	Text	12	
09	Student Sex	Text	1	
10	Student Date of Birth	Date	10	dd/mm/yyyy
11	Student Nationality	Text	20	
12	Student 1st language at Home	Text	12	
13	Date started at school	Date	10	dd/mm/yyyy
14	Transferred From	Text	20	
15	Graduation/Withdrawal Date	Date	10	dd/mm/yyyy
16	Transferred To	Text	20	
17	Graduation/Withdrawal Reason	Text	12	
18	Future Enrolment Date	Date	10	dd/mm/yyyy
19	Student External Exam Number	Text	12	
20	Student Medical Details Line1	Text	78	
21	Student Medical Details Line2	Text	78	
22	Student Medical Details Line3	Text	78	
23	Student Panadol Allowed	Text	1	
24	Medicare No.	Text	25	
25	Passport No. / ID	Text	25	

26	Visa expiry date	Date	10	dd/mm/yyyy
27	Visa No.	Text	25	
28	Permanent Resident (Y/N)	Text	1	
29	Naturalised (Y/N)	Text	1	
30	Social Security (Y/N)	Text	1	
31	Social Security Date	Date	10	dd/mm/yyyy
32	Social Security No.	Text	25	
33	Parent Salutation	Text	30	
34	Parent Mailing Title	Text	30	
35	Parent Mailing Street	Text	30	
36	Parent Mailing Town	Text	30	
37	Parent Mailing State/Country	Text	26	
38	Parent Mailing Postcode	Text	10	
39	Parent Home Address	Text	40	
40	Parent Father's Name	Text	30	
41	Parent Father's Nationality	Text	19	
42	Parent Father's Occupation	Text	20	
43	Parent Father's Employer	Text	20	
44	Parent Mother's Name	Text	30	
45	Parent Mother's Nationality	Text	19	
46	Parent Mother's Occupation	Text	20	
47	Parent Mother's Employer	Text	20	
48	1st Additional Parent Title	Text	30	
49	1st Additional Parent Comments	Text	40	
50	1st Additional Parent Street	Text	30	
51	1st Additional Parent Town	Text	26	
52	1st Additional Parent Postcode	Text	10	
53	2nd Additional Parent Title	Text	30	
54	2nd Additional Parent Comments	Text	40	
55	2nd Additional Parent Street	Text	30	
56	2nd Additional Parent Town	Text	26	
57	2nd Additional Parent Postcode	Text	10	
58+	Phone Numbers & Email Addresses	Text	multiple	

Export Student Subjects

EXPORT STUDENT SUBJECTS AND RESULTS

and

EXPORT STUDENT OUTCOMES AND RESULTS

Subject details for all current students for the current year are exported to a comma delimited (ASCII) file. The ASCII file may be imported into spreadsheets (Microsoft Excel), databases (Access), or it may be used as a mail-merge data source.

The default name of the file for Student subjects is STSUB.CSV in the main SchoolWrite folder. The default name for Student Outcomes is STOUTC.CSV. These filenames and locations may be changed.

Quick launch in Excel:

The exported .csv file may be opened up in Microsoft Excel by clicking on the button **Open in Excel**. Note: **F4 Export Now** should first be selected.

One line is exported per student subject per term. Within Excel spreadsheet, subsets of the exported data may be filtered - eg Subjects for the current term only.

View Details - ie the fields of data (or Excel columns) that are exported:

<u>Field</u>	<u>Name</u>	<u>Format</u>	<u>Length</u>	<u>Comment</u>
01	Student Surname	Text	18	
02	Student Preferred Name	Text	14	
03	Student Formal Name	Text	14	
04	Student Number	Number	7	
05	Student School Course/Year	Text	2	
06	Student Home Class	Text	2	
07	Student Sex	Text	1	
08	Student Date of Birth	Date	10	dd/mm/yyyy
09	Started at school	Date	10	dd/mm/yyyy
10	Student External Exam Number	Text	12	
11	Subject Term	Text	1	
12	Subject Code	Text	4	
13	Subject Name	Text	20	
14	Subject Class	Text	2	
15	Subject Level	Text	2	
16	Subject Teacher Code	Text	3	
17	Subject Teacher Name	Text	20	
FOR STUDENT SUBJECTS				
18	Exam Mark	Number	7	
19	Exam Average	Number	7	
20	Assessment Mark	Number	7	
21	Assessment Average	Number	7	
22	Homework	Text	1	
23	Effort	Text	1	
24	Contribution	Text	1	
25	Behaviour	Text	1	

26	Comment	Text	unlimited
FOR STUDENT OUTCOMES			
18	Descriptor	Text	various
19	Comment	Text	unlimited
20	Exam Mark	Number	7
21	Exam Average	Number	7
22	Assessment Mark	Number	7
23	Assessment Average	Number	7
24	Homework	Text	1
25	Effort	Text	1
26	Contribution	Text	1
27	Behaviour	Text	1

Export Future Enrolments

EXPORT Enrolments

All future Enrolment students, with their details, for a specified starting Year are exported to a comma delimited (ASCII) file. The ASCII file may be imported into spreadsheets (Microsoft Excel), databases (Access), or it may be used as a mail-merge data source.

The default name of the file is ENROL.CSV in the main SchoolWrite folder. This name and location may be changed.

Quick launch in Excel:

The exported .csv file may be opened up in Microsoft Excel by clicking on the button **Open in Excel**. Note: **F4 Export Now** should first be selected.

One line is exported per future Enrolment.

View Details - ie the fields of data (or Excel columns) that are exported:

<u>Field</u>	<u>Name</u>	<u>Format</u>	<u>Length</u>	<u>Comment</u>
01	Student Surname	Text	18	
02	Student Given name(s)	Text	14	
03	Student Formal name	Text	14	
04	Start Year (2004, etc)	Number	4	
05	Start Grade	Text	2	
06	Commencement Date	Date	10	dd/mm/yyyy
07	Waitlist (y/n)	Text	1	
08	Waitlist Year (2005, etc)	Number	4	
09	Application Acknowledged (y/n)	Text	1	
10	Placement Code	Text	1	
11	Comment	Text	30	
12	Priority	Number	3	
13	Interview Req'd (y/n)	Text	1	
14	Interview Result	Text	20	
15	Exam Req'd (y/n)	Text	1	
16	Exam Result	Text	20	
17	Application Fee paid	Number	11	
18	Application Fee payment date	Date	10	dd/mm/yyyy
19	Enrolment Fee paid	Number	11	
20	Enrolment Fee payment date	Date	10	dd/mm/yyyy
21	Application Action date	Date	10	dd/mm/yyyy
22	Family Code	Text	7	
23	Date of Birth	Date	10	dd/mm/yyyy
24	IQ	Number	3	
25	Gender	Text	1	
26	Nationality	Text	20	
27	Stanine	Number	1	
28	Transfer From	Text	20	
29	Medical Details Line 1	Text	78	
30	Medical Details Line 2	Text	78	
31	Medical Details Line 3	Text	78	

32	Panadol allowed (y/n)	Text	1
33	Position in family	Text	1
34	Sibling attends school	Text	1
35	Parent attended school	Text	1
36	Religion	Text	12
37	Language spoken at home	Text	12
38	Sports House Number	Number	1
39	Discount %	Number	3
40	Discount Type	Text	1
41	FFPOSS (y/n)	Text	1
42	Library (y/n)	Text	1
43	Marketing Source	Text	10
44	Mother's name	Text	30
45	Mother's nationality	Text	19
46	Mother's occupation	Text	20
47	Mother's employer	Text	20
48	Father's name	Text	30
49	Father's nationality	Text	19
50	Father's occupation	Text	20
51	Father's employer	Text	20
52	Family Discount %	Number	3
53	Parents salutation	Text	30
54	Parents mailing title	Text	30
55	Parents street address	Text	30
56	Parents suburb/town	Text	30
57	Parents country	Text	26
58	Parents Postcode	Text	10
59	Parents Home address	Text	40
60	1st additional Title	Text	30
61	1st additional street address	Text	30
62	1st additional suburb/town	Text	26
63	1st additional Postcode	Text	10
64	1st additional Home address	Text	40
65	1st additional - Fees Stmtnt (y/n)	Text	1
66	1st additional - Reports (y/n)	Text	1
67	1st additional - Mailings (y/n)	Text	1
68	2nd additional Title	Text	30
69	2nd additional street address	Text	30
70	2nd additional suburb/town	Text	26
71	2nd additional Postcode	Text	10
72	2nd additional Home address	Text	40
73	2nd additional - Fees Stmtnt (y/n)	Text	1
74	2nd additional - Reports (y/n)	Text	1
75	2nd additional - Mailings (y/n)	Text	1
76	Referee 1 Name	Text	30
77	Referee 1 Address	Text	50
78	Referee 1 Phone	Text	10
79	Referee 1 Relationship	Text	20
80	Referee 2 Name	Text	30
81	Referee 2 Address	Text	50

82	Referee 2 Phone	Text	10
83	Referee 2 Relationship	Text	20
84+	Phone Numbers & Email Addresses	Text	multiple

Export SchoolWrite Databases

EXPORT SCHOOLWRITE DATABASES

Any of the major SchoolWrite databases may be selected from a drop-down list, for easy export of information stored. (See previous Export Menu options for export of Student details, Student subjects, and Future Enrolment details.)

All current records of the selected database are exported to a comma delimited (ASCII) file. The ASCII file may be imported into spreadsheets (Microsoft Excel), databases (Access).

The default name of the exported file follows the name of the database file (eg STACC.CSV) in the main SchoolWrite folder. This name and location may be changed.

The exported .csv file may be opened up in Microsoft Excel by clicking on the button **Open in Excel**. Note: **F4 Export Now** should first be selected.

One line is exported for each database record.

Open in Excel - quick launch button:

The exported .csv file is a separate file to the SchoolWrite database, and it may be opened and manipulated in Excel without risk of affecting SchoolWrite's normal database operations.

The following is a list of the major SchoolWrite databases that can be selected from the drop-down list, exported to .csv file and then opened in Excel.

<u>File Name</u>	<u>Contents</u>
STACC.DBF	Student Accidents & Illnesses
STMED.DBF	Student Allergies & Medical Notes
STATTEND.DBF	Student Attendance/Absenteeisms
STDISCIPL.DBF	Student Discipline events
STPOSN.DBF	Student Positions Held
STRELGN.DBF	Student Welfare/Religion database
COMMENT.DBF	Standard Report Card comments
TTSTAFF.DBF	Teachers
TTSUBJECT.DBF	Staff Subject allocations
PATRANS.DBF	Parent Fees transactions
PARCPT.DBF	School Banking Receipts on Hand
PABFTRAN.DBF	Parent Building Fund Transactions
PALITRAN.DBF	Parent Library Fund Transactions
PATRANS2.DBF	2nd Currency Parent Fees transactions
PARCPT2.DBF	2nd Currency Receipts on Hand
STPAST.DBF	Past Students
PACODE.DBF	General Ledger Finance Codes
GLPSTHLD.DBF	General Ledger current transactions
GLTRANS.DBF	General Ledger prior period transactions
GLTREOY.DBF	Gen Ledger prior year transactions
GLPSTEYOY.DBF	Gen Ledger prior year adjustments
PYEMPLOY.DBF	Payroll Employee Details
PYSLPHST.DBF	Payroll Employee Details
PYHIST.DBF	Payroll Personnel Events History
GLPAYEE.DBF	Creditors Address Details
GLPYEETX.DBF	Creditors Payment History

If the original database is to be opened in software other than SchoolWrite, IT IS IMPORTANT TO FIRST **COPY** THE DBF FILES FROM THE SCHOOLWRITE FOLDER to another location. If the spreadsheet or database that is accessing the data file should inadvertently write the original .dbf file back to the hard disk, SchoolWrite data would be lost, and the SchoolWrite program will not be able to read the data. Therefore, it is essential that the file be **copied** to another place. Copies of SchoolWrite data files *may* be changed, saved, etc without fear of corrupting the original data.

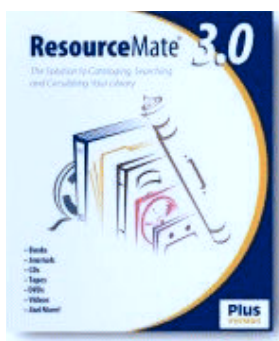
Export to Library System

ResourceMate® Library 3.0 system catalogs, searches and circulates library books and resources. It can include books, journals, CDs, DVDs, Videos, and more.

SchoolWrite integrates with the ResourceMate® Library 3.0 PLUS version, by exporting recently enrolled Student details to the Patron (ie borrower) file.

The ResourceMate PLUS Version has an option to *import* data from SchoolWrite's export.

Details of new Students are brought into an import area in ResourceMate, where they can be further inspected before being copied into the Patron file.



ResourceMate® 3.0 PLUS library software is supplied and supported by Jaywil Software Development Inc. They should be contacted directly on: info@resourcemate.com. The web site is: www.resourcemate.com

Versions of ResourceMate® 3.0

"Web Search" allows the Resource Library to be searched on the school Intranet. Alternatively, parents/students can search the library from home on the Internet.

The PLUS Version of ResourceMate® 3.0 includes

- Import of Student data from SchoolWrite.
- Barcoding.
- Full History / Statistical reporting.
- Fines.
- Distributed entry allows volunteers to use home computers.
- MARC import/export.

Steps to Exporting to Library System

- i. SchoolWrite: Create export file in SchoolWrite
See **File Menu - Export - Export to Library System**
Enter the date: **Started at school, on or after:**{DATE}. The correct date, probably the start of the new school year, should be entered for new Students. When the date is left blank, all current students are exported.
The **Export file name** should be confirmed, and changed if needed.

Student details are exported to the .csv file and include name, address, school year, phone numbers, and email address.

- ii. ResourceMate: **Import Patrons** (borrowers) from external file
Select
 1. **Plus Menu - Import Process**
 2. Select **New**
 3. Select **Import Patrons from external file (ASCII, Excel, Access etc)** and click on **Start**

4. Step 1 of 9 - select *Text File (*.txt)* and click on *Next*
5. Step 2 of 9 - *Import from File:* - locate the file PATRON.CSV in the folder where it was created in Step i. Click on *Next*
6. Step 3 of 9 - Select *Delimited*, and for Field Delimiter select *Comma (,)*. Click on *Next*
7. Step 4 of 9 - Define additional options for the data file. *First Row* enter **2**. Leave *Last Row* blank, and *Row with field names* defaults to **1**. Hit *Next*
8. Step 6 of 9 (Step5 is automatic) - check that the columns of imported data look correct - surnames under *LastName*, first names under *FirstName*, etc. Click on *Next*
9. Step 9 of 9 (Steps 7 & 8 are automatic). Click *Execute* to begin the import process.
10. Tabs under **Import Process** show the results of the import. The imported information has not been added to the actual Patron table yet. Click on the **Patrons Tab** to look at the information. Changes can still be made to the data. When ready, click on *Copy Information to Library*

Students

The screenshot shows the 'Student Details' window in SchoolWrite. The form contains the following fields and values:

- Surname: BERGER
- Preferred name: Mary
- Formal name: (empty)
- Sex: F
- Date of birth: 04/04/1994
- Year: 12
- Home Class: 1
- House: ABRAHAM
- Boarder?: N
- Library?: N
- Parent code: BERGEG
- External exam number: (empty)
- Student number: 17

Below the form fields, there is a photo of Mary BERGER, dated 25/10/2001. To the right of the photo, there is a list of optional activities: Attendance, Discipline, Accidents/Injuries, Transport, Positions held, B Band, Subjects, Marks, Phone, E-mail, Family notes, and Student notes. At the bottom of the window, there are navigation buttons: <PageUp> PREVIOUS, NEXT <PageDown>, and Record 1/25.

Fields on the Student Screen

Surname	The Surname consists of up to 18 alphanumeric characters.
Preferred Name	The Preferred Name consists of up to 14 alphanumeric characters. This is the name printed on most lists and printouts.
Formal Name	The Formal Name consists of up to 14 alphanumeric characters. This field is optional. When a name is entered here, it is used as the name on End of Term Reports, and on Student Register printouts
Sex	M for male or F for female. This is only required to be entered for Co-ed schools.
Year	This field requires the student's current school year or grade.
Home Class	This field requires the student's current HOME class (or Roll Class) which consists of one or two alphanumeric characters.
House	One of the standard Sports House names must be selected for each student. The Sports House names are stored in the school control file.
Nationality	Nationality of the student consists of up to 20 alphanumeric characters.

Optional Activities

FFPOSS (Y/N)	This field represents the first Optional Activity as specified in the school control file. 'Y' for yes or 'N' or no is required. This particular example shows if students are "Full Fee Paying Overseas Students". <i>Optional Activity</i> is use in this example to mark overseas students. During the Fees Billing process, students in this category can be separately billed.
LIBRARY (Y/N)	This field represents the first Optional Activity as specified in the school control file. 'Y' for yes or 'N' or no is required. This particular example shows students categorised as "LIBRARY" Students. Separate lists can be obtained of students in the above two Optional Activities - See STUDENTS - PRINTOUTS and REPORTS.
Date of birth	The student's date of birth is required.
Parent Code	The Parent Code consists of up to 7 characters including numerics. This code identifies which 'family' the student belongs to. The parent record with the same Parent Code must already exist before any financial or family report processing is performed.
External Exam Number	This is a 12 character field use to store the Student's external exam number, or other public record identifier. This is different to the Student Number, which is internal to the school. The External Exam Number is printed on Student

Alphabetical Lists - See STUDENTS - PRINTOUTS and REPORTS.

Student Number This field is the unique identifier for each student and consists of up to 7 digits. Usually this number is auto-allocated by the system. However, it is possible to enter your own number, when you are adding a student. In this case, you should make sure that your entered number is unique. This Number stays with the Student throughout their school life, and then as a Past Student. The Student Number cannot be changed.

Filter Access:

This feature allows temporary access to student records so that only those for a particular School Year/Grade (and Home Class) are shown when moving to the next or previous student.

The Filter Access is cancelled either by requesting a new Filter Access and setting the year to *blank*, or by closing the Student Details screen, and re-opening it.

Parent Details (F2):

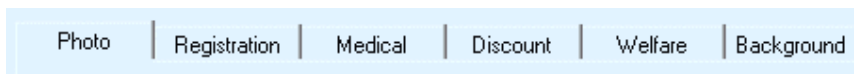
By clicking on the Parent (F2) button, the Student Details screen temporarily closes, and the Parent screen for that student is displayed. The Student Details are restored by clicking on the Student icon (or by selecting ***Student menu - Student Details***)

Timetable (F10):

By clicking on the Timetable (F10) button, the Student Timetable is shown. This is the current timetable, as set up in the Timetable Module. This is the same display as will be printed when printing Student Timetables.

Student Information on screen-Tabs

The following Tabs may be selected with the mouse:



The Tab that is currently selected will stay on top during navigation to subsequent students.

Photo:

The photograph of the student is displayed when the picture has been correctly stored in the computer. Initially all Student photographs are stored in the IMAGES folder directly beneath the SchoolWrite working folder (or directory). If the IMAGES folder does not exist, it must be created.

Student photographs are stored in the IMAGES folder as graphics files with the STUDENT NUMBER as the name of the file. The standard graphic file formats of JPG, BMP, GIF and PNG are all acceptable.

Examples: 17.BMP 1998217.JPG 3116.GIF 12356.PNG

The picture may be any size, as it is resized to fit the screen when displayed. However if the size is larger than 30K (thirty thousand bytes). the image will not automatically display - the "F4 View Photograph" button must first be clicked (or the F4 button hit). Large photographs take extra time to display, and can slow down the navigation between students. The ideal photo size is 240 (wide) x 180 (high) pixels.

If the photo is not present in the IMAGES folder, the student's picture may be loaded from any (permanent) location on the network. This is achieved with the **Reload Picture** button. When a photo is **reloaded** the network address is stored in the "student picture location file" in the IMAGES folder. This file has the name of the student number and the extension of .path. Eg 17.PATH

A .path file, or a graphics file, may be **removed** at any time. First click on the *Reload Picture* button and select **Files of Type** at the bottom of the file dialog screen. The files may be of type .jpg, .bmp, .gif, .png or 'Student picture location files'. When the desired file is located in the appropriate folder, right-click on the file-name and select **Delete**. The file will be sent to the recycle bin.

School Logo:

A school logo is displayed if the Student photo is not available. By default, the logo displayed is the graphics file **sch_r1.gif**. If this file is removed from the SchoolWrite folder (directory), then the logo displayed is the one specified for the Letterhead (see **Miscellaneous Menu - Letterhead Graphics**).

Registration:

The student's registration and graduation details are displayed, with the following details:

Date started at school: The date defaults to the current processing date.

Transferred from: This field is used if the student was transferred from another school. It may be left blank.

Date left school: This is the student's withdrawal or graduation date.

This date is a **controlling date** to show if the student has left school.

If there is a **past date** entered here, the student has in fact left the school. If the student returns to school in the future, this date can be cleared by pressing DEL in the date positions to give ' / / '.

Past graduation dates keep students from being included in normal processing. They will not be billed in automatic fees billing if they have graduated from school when the billing run is processed. They will not be included in class lists and other printouts after their graduation date.

If a **future date** is present, student printouts and reports will check the date against the date requested for the print-out. If the withdrawal date is still in the future, the student **will** be included on the list. Future graduation dates may be used where it is known that a student will leave at a certain date.

Reason for leaving: The system will enter **GRADUATED** in this field after using the option **Promote Students** for senior year students. This option is on **Students Menu - Student Miscellaneous - Promote Students**.

Transferred to: This field is used if the student transfers to another school. It may be left blank.

Future Enrolment date: If this date is present, student printout and reports will check this date against the date requested for the print-out. If the student's Enrolment is still in the future, they will **not** be included on the list. Future **Enrolment** dates may also keep students from being billed in automatic fees billing. If they have not started at school when the billing run is processed, they will not be included.

Medical:

The student's medical details, allergies and immunisations are displayed here.

Allergies & medical notes: Three lines of data may be entered, showing information that teachers and other carers should be aware of.

Panadol allowed? or HIV Positive? This should be entered **Y** or **N**.

When the file HIVAIDS.\$VL is present in the SchoolWrite folder, the message is HIV Positive. Without this file in the folder, the message defaults to Panadol allowed.

Immunisations: The numbers of doses or injections for each major immunisation are recorded here. A printout in the Student Printouts and Reports area will list students whose immunisations are not complete.

Immunisation types and their maximum doses can be set in **Miscellaneous Menu - Miscellaneous Files - Immunisation Doses**. Up to 10 immunisation types may be set.

Discounts:

Discount percentage applicable to a student is shown here. A student discount will be either a **Scholarship** or a **Bursary**. Different account numbers may be setup for each discount type. Student Scholarship and Bursary discounts apply before **family discounts** and before **sibling discounts**.

Church/Religion/Welfare details:

The type of details shown here are determined in the School Profile setup area - see ***Miscellaneous Menu - Control Information - Profile***

For a Protestant school, the following **Church** details are shown:

- Denomination
- Local church
- Church attending
- Baptism date
- Baptism Church
- Youth group (Y/N)
- Confirmed (Y/N)
- Membership (Y/N)
- Confirmation Date
- Confirmation Church

For a Catholic school, the following **Sacraments** details are shown:

- Religion
- Local parish
- Parish attending
- Baptism date
- Baptism parish
- Reconciliation (Y/N)
- Confirmed (Y/N)
- Eucharist (Y/N)
- Confirmation Date
- Confirmation parish

For a Jewish school, the following **Synagogue** details are shown:

- Faith
- Local Synagogue
- Synagogue attending
- Bar Mitzvah date
- Bar Mitzvah Synagogue
- Youth group (Y/N)
- Bat Mitzvah (Y/N)
- Membership (Y/N)
- Bat Mitzvah Date
- Bat Mitzvah synagogue

For a school with no religious affiliations, **Welfare** details are shown:

- Denomination
- Medicare No.
- Passport No/ID
- Visa expiry date
- Visa No.
- Permanent Resident (Y/N)
- Soc.Sec (Y/N)

- Naturalised (Y/N)
- Soc.Sec Date
- Soc.Sec No.

Background:

The student's background details are displayed here.

Nationality: Birth nationality

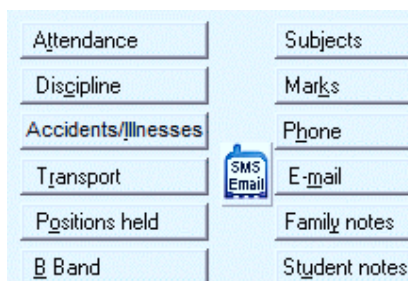
1st Language at home: Language normally spoken at home

IQ (Intelligence Quotient): IQ rating

Marketing Source: How the student originally came to the school

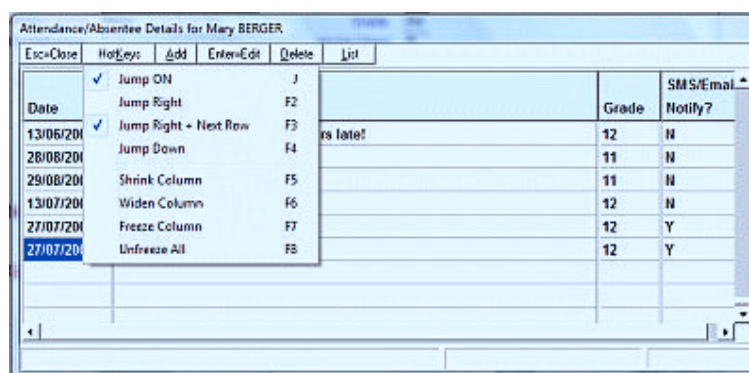
Students subsidiary databases

The following *buttons* on the Student details screen show subsidiary database details, for the one displayed student. If password privileges allow, subsidiary database details may be entered, edited or deleted.



Hotkeys:

When viewing any of the subsidiary databases, there is a sub-menu option **Hotkeys**.



The Hotkeys have the following effect:

J Jump: *Jump effect* is what happens **after** hitting the enter key when editing or entering data. When Jump is **on**, the cursor jumps either to the *right*, or *down* to the next row, or *both* depending on the next selection. The Jump effect is toggled on/off each time the **J** item in the pull-down menu is clicked with the mouse.

F5 - Shrink Column: The column where the cursor is resting will be shrunk each time the F5 key is hit.

F6 - Widen Column: The column where the cursor is resting will be widened each time the F6 key is hit.

F7 - Freeze Column: Column locking is activated progressively, one column at a time. Frozen columns stay on the screen at all times, whilst other columns to the right are navigated via the mouse or the arrow keys. Locked column headers have a slight grayish cast to give a subtle visual indication.

F8 - Unfreeze all: All column locks previously set are released.

The hotkey setting is restored to the default settings when the subsidiary database is closed.

Attendance:

Absentee details are kept for the student. Each Attendance/Absentee detail is stored for the duration of the student's school life. When the Attendance subsidiary database for this student is opened, the cursor is positioned towards the bottom of the list, showing the most recent entries.

Date: The date defaults to the current processing date.

Details: The details of each Attendance/Absentee are keyed here. By hitting <Enter> or double-clicking on the details line, a pull-down list of standard Attendance codes may be selected to replace the current contents of the line. A benefit of using the pull-down list of codes is that each line starts with the code, allowing for future analysis or reporting.

Standard Attendance codes may be setup for your school in *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Attendance Codes*

Year/Grade: This defaults to the students current school year/grade.

Discipline:

Discipline details are kept for the student. Each Discipline detail is stored for the duration of the student's school life. When the Discipline subsidiary database for this student is opened, the cursor is positioned towards the bottom of the list, showing the most recent entries.

Date: The date defaults to the current processing date.

Reported by: The teacher's name is keyed here

Details: The details of each Discipline infringement are keyed here. By hitting <Enter> or double-clicking on the details line, a pull-down list of standard Discipline codes may be selected to replace the current contents of the line. A benefit of using the pull-down list of codes is that each line starts with the code, allowing for future analysis or reporting.

Standard Discipline codes may be setup for your school in *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Discipline Codes*

Further Details: Extra information is keyed in this line.

Action Taken: Extra information is keyed in this line.

Year/Grade: This defaults to the students current school year/grade.

Accidents/Illnesses:

Accident and Illness details are kept for the student. Each Accident/Illness detail is stored for the duration of the student's school life. When the Accident/Illness subsidiary database for this student is opened, the cursor is positioned towards the bottom of the list, showing the most recent entries.

Date: The date defaults to the current processing date.

Reported by: The staff or parent name is keyed here

Medical Code/Details: The details of the accident or illness are keyed here. By hitting <Enter> or double-clicking on the details line, a pull-down list of standard Accident/Illness codes may be selected to replace the current contents of the line. A benefit of using the pull-down list of codes is that each line starts with the code, allowing for future analysis or reporting.

Standard Accident/Illness codes may be setup for your school in *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Acc/Illness Codes*

Treatment Code/Details: The treatment details of the accident or illness are keyed here. By hitting <Enter> or double-clicking on the details line, a pull-down list of standard Treatment codes may be selected to replace the current contents of the line.

Standard Treatment codes may be setup for your school in *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Treatment Codes*

Further Details: Extra information is keyed in this line.

Transport:

Transport details are kept for the student for the current year or semester. When the Transport subsidiary database for this student is opened, all the stages of the student's trip to and from schools are shown. This may be a single bus or train trip, or it may include several legs of the journey

Number: This is the sequential number of the leg of the journey to or from school.

Company: The Transport Company code is entered here. The code is selected from a drop-down list of available companies. See *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Transport Companies*.

From: Details of the bus stop, train stop, etc are entered here.

To: Details of the bus stop, train stop, etc are entered here.

Route: Route number or code is entered here.

Ticket: Ticket number may be entered here.

Positions Held:

Positions Held details are kept for the student. Each Positions Held detail is stored for the duration of the student's school life. When the Positions Held subsidiary database for this student is opened, the cursor is positioned towards the bottom of the list, showing the most recent entries.

Date: The date defaults to the current processing date.

Details: The details of each Positions Held are keyed here.

Band: (name is variable)

Band details are kept for the student for the current year or semester. When the Band subsidiary database for this student is opened, one or more Bands of which the student is a member are shown.

Instrument: The Instrument code is entered here. The code is selected from a drop-down list of available instruments. See *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Instrument*.

Band: The Band code is entered here. The code is selected from a drop-down list of available bands. See *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Band*.

Leader?: Indicates if the Student should be listed first in the Band/Instrument printout.

Sort Position: This is an indicator to show the sequence in which students should be printed in the Band/Instrument printout. Note: the same student may be listed more than once in this printout, with the *Sort Position* controlling the position of entries in the list.

Subjects:

These are the subject choices for the student **for the current term**. Subject choices for previous terms are stored for the duration of the Student's school life, and beyond, and may be viewed by changing the **Term and Date** in the Miscellaneous Menu.

Line: Subject lines indicate the sequence in which subjects are printed on printouts and reports. Lines also indicate:

Lines 1-24: curricular subjects

Lines 25-32: co-curricular subjects (eg sports, clubs, etc)

Code: The Subject code code is entered here. The code is selected from a drop-down list of available subjects. See Miscellaneous Menu - Miscellaneous Files - Subject Files - Subjects. Subjects have an indicator "**Curricular (Y/N)**". The Line numbers used for each subject should be consistent - ie line numbers 1-24 for curricular subjects, etc.

Description: The full name of the subject code is displayed here. The name cannot be changed here.

Year/Grade: The current school year of the Level (grade or year) of the specified subject is entered here. Usually the Level of the subject is the student's school year. However, this is not always the case - eg when a student is accelerated to the next year for one particular subject. Another reason for entering a different year to the student's school year is when *composite classes* are arranged together.

Class: The Subject Class code (eg A, B, etc) is entered here. A check is made of all available classes in the Timetable Allocation (if any) for this subject code. A list of available classes is presented, for easy selection. If the required class is not in the list, the ESC button can be clicked, and the new class code stays for that student.

Teacher: This field on the screen displays the teacher's initials for this class. This is display only. The teacher's initials are NOT keyed into this screen. To automatically allocate teacher codes to classes - Students Menu - Student Miscellaneous - Update Class Sizes.

Marks:

Marks and comments may be entered for **current term** subjects for this student. The available subjects for mark entry are those entered in the Subjects subsidiary database above.

Marks: Exam marks, assessment marks and gradings may be entered here. The shading of the columns indicates where marks may or may not be entered.

The headings for the columns are set for the school in Miscellaneous Menu - Miscellaneous Files - End-of-Term Report Headings and also in Miscellaneous Menu - Subject Files - Set Extra Subject Marks.

Comments: Comments for each Subject are entered here. The left-hand box lists all subjects, teaching and non-teaching.

If Outcomes Descriptors have been setup for subjects, a right hand box shows available descriptors for the subject that is high-lighted in the left hand box.

After selecting the subject (or outcomes descriptor), a comment box opens, to allow free form entry of the desired comment. A *Spell Check* button is located at the bottom of the screen, when the Dictionary is available. See [Spell Check Options](#) for further details.

A list of standard comments may be accessed whilst entering comments in the box. Any selected standard comment is inserted into the comment box at the point where the

cursor is.

(Outcomes Descriptors are assigned in Miscellaneous Menu - Subject Files - Set Descriptors per Subject.)

Descriptor Marks: This is available only when Outcomes Descriptors have been setup within SchoolWrite.

Marks and gradings may be entered for Subject Descriptors in a grid. The grid shows all Descriptor marks and gradings for the selected subject. The shading of the columns indicates where entries may or may not be made.

The Marks and gradings that may be entered for Outcomes Descriptors are assigned in Miscellaneous Menu - Subject Files - Set Descriptors per Subject.

Averaging Student Marks:

This option is found in **Student Menu - Students Miscellaneous - Average Student Marks.**

Student exam marks and class assessment marks are automatically averaged. The averaging process may be initiated for:

- all subjects for a whole school year
- one subject for a nominated school year
- one nominated subject class

Zero marks are not included in the averaging process.

Phone:

Phone numbers for the **family** are shown. All students with the same Parent Code share the same family phone numbers. Phone numbers, fax numbers and mobile phone numbers are all listed here. There is no limit.

Name: The name to whom the contact number applies.

Description: Description of the contact number

Phone number: The phone or fax number

SMS Notify?: Y/N indicator to show if this phone number should be sent an automatic SMS message (see Communicate with Parents).

Email:

Email addresses for the **Student**. Each student has his or her own email address(es). There is no limit.

Name: The name to whom the email applies - usually the Student's name

email address: The full email address.

Quick Send SMS & Email:



Quick-send SMS and/or email to the current student. The Student's email addresses and family phone numbers and parent emails are displayed to enable a selection to be made. A single short message is entered and sent.

See [Quick-Send SMS / email](#)

Family Notes:

Notes regarding the **family** are shown. All students with the same Parent Code share the same family notes. There is no limit to the length of the Notes. This area is passworded, and only the password with *update* privileges may change the notes. *Display* privileges may view the notes, whilst the Family notes button is removed for *No access* passwords.

Student Notes:

Notes regarding the **student** are shown. The notes on this page are only for this Student. There is no limit to the length of the Notes.

When printing the Alphabetical Student List, there is provision for a nominated number of lines of Student notes to be printed.

Student Printouts and Graphs

Printouts & Reports:

The system will request certain parameters for each report. These parameters will typically consist of:

- a range of school years
- Home Class (all Home Classes if field is blank)
- Enrolled as at a requested date (defaults to processing date)

Inclusion of a student in any print-out is dependent on their current Enrolment **as at** the date requested. If the **as at** date of the print-out is any date other than the current processing date, the heading of the print-out will show the **as at** date. Any students with a future Enrolment date will not be included in the print-out. Similarly, any students with a past graduation date will not be included.

How Student Names are printed.

There are 3 options on Student print request screens:

- *Upper case Surname* eg **BAGUMA Mary**
- *Upper / Lower* eg **Baguma Mary**
- *Unchanged* ie as displayed on Student Details screen eg **BAGUMA MARY**

Refer to [Printout Requests](#) for the options that may be selected for printing or previewing printouts and reports.

Refer to [Printer Settings](#) for options that change the appearance of the printout, including school logos and watermarks.

Refer to [Previewing Reports](#) for the options available to control the on-screen preview and optional printing of a report.

Graphs:

The system will request certain parameters for each graph. For Student graphs, these parameters will typically be:

- a range of school years
- Home Class (all Home Classes if field is blank)
- Enrolled as at a requested date (defaults to processing date)

The graph is presented on the screen, using the data as specified.

Printing Graphs:

Graphs are displayed in *print preview* mode, ready for printing.

Refer to [Previewing Reports](#) for the options available to control the on-screen preview and optional printing of a graph.

Extra Subject Marks

The **standard** marks and letter grades that are entered against one subject are:

Exam Mark %

Class Asses %

4 x Letter Grades A-Z

Extra Subject Marks are accessed from: **Miscellaneous Menu - Miscellaneous Files - Subject Files - Set Extra Subject Marks.**

Extra marks/grades may be user-defined. The definition of extra marks should be made PRIOR TO any marks/grades being entered for Students' subjects.

Tailored end-of-term reporting programs are required to access extra marks and Gradings.

DEFINING EXTRA SUBJECT MARKS

When the option to **Set Extra Subject Marks** is first activated, the screen asks:

**The Extra Marks Definition file does not exist
Do you want to create it?**

Answer this screen with **Y**.

The following screen is then used to specify field definitions:

Extra Mark Name	Disk Type	FROM	TO Grade	Char/Numeric	Length	Decimals
XMARK1	1	1	12	N	3	0
XMARK2	1	1	12	N	3	0

Disk type: 1 SUBJECT CLASS TEACHERS
2 HOME CLASSTEACHER
3 HOUSE TEACHER
4 YEAR COORDINATOR
5 PRINCIPAL
9 Subject DESCRIPTORS only

Extra Mark NAMES must start with letter "X".

ZERO From & To Grades indicates ALL Grades

When adding a new extra mark, start the first letter with 'X'. Then key the Disk Type for the Extra Mark. Then key in all of the fields across the screen.

PREPARE NEW TERM

All new Terms prepared will automatically include the Extra Marks fields.

ENTER EXTRA MARKS for STUDENT SUBJECTS

'Maintain Student Marks' screens will now show the following extra fields for the designated school Years and

subjects.

ENTER EXTRA MARKS ON REPORTWRITE SCREENS

Extra Marks are entered on the Teachers' ReportWrite screens by selecting the Marks option. The standard marks are entered first, and then the cursor moves to the extra Marks.

Extra Marks may also be entered in the 'Quick Entry of Marks and Ratings' (spreadsheet) screen - after hitting the <F1> key.

Outcomes Based Reporting

Outcomes-based Reporting allows much more DETAILED reporting on the progress of a student. A separate page for each subject is usually required.

Outcomes-based Reporting gives details about competencies achieved by the student. Each major Subject is divided into competency areas (outcomes), and progress in each competency is reported via a selection of marks, gradings and comments.

BEFORE USING DESCRIPTORS PER SUBJECT:

Without the use of DESCRIPTORS, SchoolWrite Subjects & Marks are TWO DIMENSIONAL. ie Subjects can be listed DOWN the page, with each subject having Marks & Grades ACROSS the page.

eg:

Marks for each subject 2 dimensions

SUBJECT	Exam Mark	Class Asses	Home Work	Effort	Contrib'n	Behav'r	Comment	Extra Marks
1 English	*	*	*	*	*	*	*	*
2 History	*	*	*	*	*	*	*	*
3 Physics	*	*	*	*	*	*	*	*
4 Chemistry	*	*	*	*	*	*	*	*
5 Geography	*	*	*	*	*	*	*	*
6 Economics	*	*	*	*	*	*	*	*

NOTE: **Extra** marks (and gradings) can be allocated to subjects. See separate chapter on Extra Subject Marks.

USING DESCRIPTORS PER SUBJECT

When using Subject Descriptors, SchoolWrite's end-of-term reporting becomes THREE DIMENSIONAL.

Each Subject can have any number of DESCRIPTORS associated with it. Each Descriptor can have any combination of marks, gradings, comments and Extra Marks associated with it.

eg:

SUBJECT	Exam Mark	Class Asses	Home Work	Effort	Contrib'n	Behav'r	Comment	Extra Marks	Extra Gradg
1 English									
Spelling							*		
Oral	*		*	*					
Writing	*		*	*					
Grammar	*						*	*	*
Use of capitals			*				*		
Contains single thought			*				*		
Verbs-subjects & objects			*				*		
Use of adjectives			*				*		
Use of adverbs			*				*		
Use of punctuation			*				*		
Abstract thought	*						*		
Description of scene	*						*		
Editing	*						*		

SUBJECT	Exam Mark	Class Asses	Home Work	Effort	Contrib'n	Behav'r	Comment	Extra Marks	Extra Gradg
2 History									
Roman History	*		*	*	*		*		
Greek History	*		*	*	*		*		
Modern History	*		*	*	*		*		
3 Physics						*	*		
Practical				*	*		*		
Theory	*		*				*		
4 Chemistry						*	*		
Practical				*	*		*		
Theory	*		*				*		

5 Geography	*		*	*	*	*	*
6 Economics			*	*	*	*	*
General J-Curves	*						*
Stock Exch Princ	*						*
Bonds & Valuations	*						*

Subject Descriptors are allocated to a Subject Code (eg **ENG**) for specific school Grades. To ensure maximum flexibility, Descriptors may also be allocated to subjects for a specific **term**. eg in Terms 1 & 2 **English** Descriptors could be **Spelling, Spelling - Oral & Spelling - Written**, whilst in Term 3 these descriptors could be **replaced** by **Speaking Skills, Speaking Skills - Content** and **Speaking Skills - Delivery**. Other Subjects such as Physics and Chemistry could have the **same** Descriptors for all terms (**Practical** and **Theory**).

The *standard* layout of End-of-Term Reports is one-page-per-subject when Outcomes-based Descriptors are implemented. Report layouts may be tailored to the requirements of individual schools. The layout should be specified to BBA Software for a tailored program to be written and emailed. Tailored end-of-term reporting programs are also required to report on Extra marks and Gradings.

The STANDARD marks and letter grades are:

Exam Mark %

Class Asses %

4 x Letter Grades A-Z

Extra marks/gradings may be user-defined. See **Miscellaneous Menu - Miscellaneous Files - Subject Files - Set Extra Subject Marks**

NOTE: Extra Marks and Gradings should be defined, as well as the structure of Outcomes-based reports, **prior to** any Student marks or grades being entered.

SET DESCRIPTORS PER SUBJECT

This option is available on **Miscellaneous Menu - Miscellaneous Files - Subject Files - Set Descriptors per Subject**

The menu option, when first activated, asks:

The Descriptors Definition file does not exist

Do you wish to create it (Y/N)

Answer this screen with 'Y'.

Maximum Descriptor length: 40

If extra length is required for Descriptors, eg for a tailored program to be written, specify the length here. 40 is the default.

The following screen is then used to specify field definitions:

SUBJECT	Year	Description	Report Position	SHOW EXAM MARK	SHOW CLASS
MATH	12	CLASSWORK ...	4	N	N
MATH	12	FORMAL TESTING ...	5	Y	Y
PHYS	10	THEORY ...	1	Y	Y
PHYS	10	PRACTICAL ...	2	N	Y
PHYS	11	THEORY ...	1	Y	Y
PHYS	11	PRACTICAL ...	2	N	Y
PHYS	12	THEORY ...	1	Y	Y

BLANK Subject CODE to delete

Y indicates columns are required.

To **add** a new Descriptor, click on the **Add** button and move the cursor to the left hand column, and key in the code of

A 'Y' should be entered into each column where a mark, grading or comment is required. The column should be left blank where a Descriptor does NOT have a Mark or Grading or Comment.

The following is produced as the **standard** printout of Outcomes Based Reporting. Many schools wish to define their own report layout. Some schools wish to have different layouts for various school years. A **tailored program** can be written to meet these needs (BBA Software will quote the cost of providing tailored reports - when a sample is supplied in Microsoft Word or Excel format.)

[illegible]

A specific Class and/or Term *may* be specified for any Descriptors.

Set Descriptors per Subject

Esc=Close HotKeys Add Enter=Edit Delete

SUBJECT	Level	Description	MARK1	MARK2	CLASS	TERM
ENG	11	SPEAKING	N	N		0
ENG	11	READING	N	N		0
ENG	11	WRITING (CREATIVE WRITING) ...	Y	Y		1
ENG	11	SENTENCE CONSTRUCTION & G...	Y	Y		2
ENG	11	COMPREHENSION ...	N	N		0
ENG	11	SPELLING	N	N		0
ENG	11	USE OF LIBRARY	N	N		0

BLANK Subject CODE to delete

Y indicates columns are required.

Default headings for **standard marks and gradings** are established in the **Miscellaneous Menu - Miscellaneous Files End-of-Term Report Headings** menu option. These default headings are the ones used if they are **not** defined here.

Headings for Descriptors are set in **Miscellaneous Menu - Miscellaneous Files - Subject Files - Set Extra Subject Marks**. The default headings for **Extra Marks** are the names assigned to the Extra Mark columns eg XASSIGN1 will have the default heading ASSIGN1.

The heading "SPELL TEST" will appear on all columns where exam marks are entered in Term 1. The heading "ESSAY" will appear over the same columns in Term 2. (Push to the right with right-arrow to see Term.)

The places where these defined headings will appear are:

- Mark entry columns - SchoolWrite Students screens
- Mark entry columns - ReportWrite screens
- End-of-Term Report printouts

ENTERING MARKS AND GRADINGS FOR DESCRIPTORS

DESCRIPTORS	EXAM MARK	CLASS ASSEES	HME WRK	EFF ORT	CNT B'N	BEH AVR	MARK1	MARK2
SPEAKING	90	76	D	C	D	C		
READING	54	67	A	D	B	B		
WRITING (CREATI...	61	82	D	C	B	B	52	75
COMPREHENSION...	55	91	D	D	C	A		
SPELLING	58	67	D	A	C	C		
USE OF LIBRARY ...	77	74	A	C	A	D		

Marks are entered in SchoolWrite's Marks Screen for the selected student - first for the **main** subject, and then for **Descriptors** for that subject. The shading of the cells indicates where marks and grades may be entered.

Comments are entered under the *Students Marks* button. Comments for Descriptors are selected in the same place as main subject comments. Descriptor titles are indented with an underscore character (_).

The entry of comments for Descriptors follows the same rules as for main Subject comments:

- Comments must fit within the box (eg 5 lines)
- Standard comments can be automatically inserted (<F2> key)

REMOVE DESCRIPTORS FROM SCHOOL

When Descriptors are removed, only Exam and Assessment marks and gradings may be entered for Student subjects.

This process removes Descriptors **for the current calendar year**. It is possible to have Descriptors set for some calendar years and not for others.


Student Transcripts

Student Transcripts show a student's performance over a range of school years.

Subject files for different school years are scanned to locate all subjects taken by the student when enrolled in specified school years or courses. Subjects that are listed may be restricted to curricular subjects only, or may include co-curricular subjects.

SchoolWrite Demonstration

Demonstration only - needs to be registered



Student: Clare CUMBERLAND
47 ROBERT STREET
WILEY 2667

Student Number: 25
Date of Birth: 13/07/1986

Year	Course Name	Year	Unit	Mark	Letter	Grade Point
2002	Chemistry	11	1.0	51.0	C	2.0
2002	Economics	11	1.0	50.0	C	2.0
2002	English	11	1.0	52.5	C	2.0
2002	Geography	11	1.0	50.5	C	2.0
2002	Mathematics	11	1.0	52.0	C	2.0
2002	Physics	11	1.0	51.5	C	2.0
2003	Chemistry	12	1.0	53.0	C	2.0
2003	Economics	12	1.0	52.0	C	2.0
2003	English	12	1.0	54.5	C	2.0
2003	Geography	12	1.0	52.5	C	2.0
2003	Mathematics	12	1.0	54.0	C	2.0
2003	Physics	12	1.0	53.5	C	2.0

Total Units: 12.0
 Average Letter Grade: C
 Grade Point Average: 2.00

sample Student Transcript

The **mark** for each subject is obtained from a percentage formula, based on a table of Term Percentages. The percentage formula takes into account the Exam mark (1st % mark in the columns of SchoolWrite subject marks) and the Assessment mark (2nd % mark in the columns of subject marks). A percentage of each mark may be set for each term in the school year. Where an exam mark is not present, eg for a co-curricular subject, another formula may be applied which takes percentages of the assessment mark only for each term. The following table describes this:

Term Percentages

ESC=Quit

Term

1
2
3
4

Including Exam

Asses	Exam
0.00	0.00
40.00	0.00
40.00	0.00
0.00	20.00

Excluding Exam

Asses
0.00
25.00
45.00
30.00

F4 Save

This table is accessed from the Report request screen for Student Transcripts (button = "Term Percentages")

The **letter grade symbol** (eg A, A+, etc) and the **grade point** (a number between 0 and 9.9) are obtained from a table of values, which can set to suit local requirements.

Symbol	Percentage Range		Grade Point Value
	From	To	
A+ or A	100	80	4.0
B	79	60	3.0
C	59	40	2.0
D	39	20	1.0
E	19	0	0.5
	0	0	
	0	0	
	0	0	
	0	0	
	0	0	
	0	0	
	0	0	
	0	0	
	0	0	
	0	0	
	0	0	
	0	0	

This table is accessed from the Report request screen for Student Transcripts (button = "Set Grade Points")

Notes on the calculation of Grade Points are optionally included at the end of the Transcript:

Notes on calculation of Grade Points

Grade Point (/ Unit) for Letter Grade:

A=4.0 B=3.0 C=2.0 D=0.5

Letter Grade from Mark:

A=100-90 B=89-69 C=68-38 D=37-1

Weighting if exam indicated:

Term 1 Assess = 0%

Term 2 Assess = 25%

Term 3 Assess = 0%

Term 4 Assess = 25%

Term 1 Exam = 0%

Term 2 Exam = 25%

Term 3 Exam = 0%

Term 4 Exam = 25%

Weighting if no exm indicated:

Term 1 Assess = 0%

Term 2 Assess = 50%

Term 3 Assess = 0%

Term 4 Assess = 50%

Email End-of-Term Reports

Acrobat .Pdf files may be created whilst printing a selected range of End-of-Term Reports. These files may be emailed direct to the parents' email addresses, when the workstation is connected to the Internet.

PREPARATORY STEP:

Ensure Parent email addresses are marked with **Notify** where appropriate. Notifications may be sent to multiple email addresses for one parent. See *Parent Details screen - Parent E-mail button*. **Notify?** (Y or N) is set after each email address.

Note: When a Parent does **not** have an email address marked as **Notify? = Y**, then the .pdf file will not be included in the email list for sending automatic emails in Step 2 below.

Create .pdf files should be 'ticked', and a destination folder should be selected, as a suitable place for storing the created .pdf files. Good housekeeping principles would suggest that a folder be created (eg in Windows Explorer) for storing these .pdf file. Note: .pdf files of the same name in that folder are over-written with the latest End-of-Term Reports. Archiving of previous .pdf files should be done first.

.Pdf files are emailed in a two-step process (see below) when **email Parents** is 'ticked'

PRINT END-OF-TERM REPORTS

End-of-Term Reports are produced:

- as printouts
- also as .pdf file (optionally)
- and with .pdf files ready to email to Parents (optionally)

If .pdf files are required **instead of** a hard-copy printout, then **F5 Preview** should be selected, and the preview may be discarded.

SENDING END-OF-TERM REPORTS (.Pdf File) BY EMAIL:

STEP 1: Preview emails

Email Report Cards Red=SENT Green=READY TO SEND Yellow=ON HOLD

Date	Parent code	Student names	Email address	Report Card
27/07/2000	BORKMP	Jill	bork@aol.com	27.pdf
27/07/2000	CAMF	Mellisa	camme1@upsw.net.edu	20.pdf
27/07/2000	CALVEL	Ryan	ccc@aol1.com	19.pdf
27/07/2000	BERGEG	Mary	gbb@inertlink.com	17.pdf
27/07/2000	BERGEG	Peter	gbb@inertlink.com	18.pdf

Preview emails. Emails are presented in date order, showing the most recent entries at the bottom of the list. These are in GREEN if the emails are ready to send, they are in RED if they have been sent, and they are in YELLOW if they are on hold.

Changes may be made to most of the columns, prior to sending emails. eg email address may be amended.

Individual records may be deleted.

Individual records may be placed on HOLD. Emails for records on Hold are not sent.

When "Date sent" is deleted, the record changes from RED (sent) to GREEN (not sent).

A **printout** is requested by clicking on the List button. The printout is for emails to be sent, or for emails sent. The printout serves as a log of emails sent, or as a check sheet prior to sending emails.

After printing emails sent, an option is given to permanently **remove the list of emails sent**.

STEP 2: Send emails

Send emails. All unsent emails are sent, unless they are marked Hold. The date and time of sending are automatically placed in the right hand columns (see Preview email notifications above). .Pdf files are sent as attachments to the emails.

Send emails now - Report Cards

ESC=Quit

Email text:

Dear ^1

Attached is the End of Term Report for ^8.

If you would like to discuss any aspect of the Report Card, please contact the school office to make an arrangement.

Formal email

☒ Rich Text(HTML) & logo

☐ Plain Text

Subject Line: Report Card for ^8

From email: admin@school.edu

Reply email:

SMTP Mail server: mail.school.com

Test email connection

email authentication specifications:

☐ Authentication required for outgoing emails, only need to complete once

User Account: Password: Port: 0

F4 Send emails

There are various parameters which need to be set up once only. After sending emails, the previous parameters re-appear each time.

Test email connection button. By clicking on this button, the system checks to see if the internet connection is available and on-line. It verifies the SMTP Mail server address.

If an internet connection needs to be dialled, it should be dialled and connected before clicking on the Test email connection button, or before selecting F3 Send emails.

The results of testing the email connection are either:

Successful connection - you can send emails

or

Cannot find SMTP/POP3 server

Fields on Send email notifications Screen

Email text The text in the window may be modified to suit. The last modification re-displays in this window the next time this screen is displayed. The text can have substitution data inserted with Parent-specific data - as for **Subject Line** below.

Format email Rich Text (HTML) & Logo:
This generates emails with the school logo and address at the top, followed by the text of the Standard Letter.

The graphics file and text lines are taken from SchoolWrite's Letterhead Graphics. The text from Text Lines 1, 2 and 3 are included. (Note: when a Text Line in Letterhead Graphics has zero coordinates it is not printed on the Letterhead, but it will be included at the top of the email. This allows email addresses, etc to be included in email notifications but not included in Letterheads.)

Plain Text:

Only the text of the Standard Letter is included in emails, without the school logo or letterhead address details.

Subject line The Subject Line is seen in the In Box of the email recipient. The Subject Line can have substitution data inserted with Parent-specific data to distinguish the email so that it is not rejected as SPAM. The Substitution codes (from Parent Standard Letters) that may be used are:
^0 - the DATE of the Absence
^1 - Parent salutation
^2 - Parent mailing title

From email The FROM email address is seen in the In box of the email recipient. This will be the email address for school administration. eg admin@schoolwrite.com

Reply email The REPLY email address is often not seen by the email recipient. This is the email address used when the recipient hits the Reply button.

The REPLY address is optional, and when omitted, the FROM email address is used for the Reply.

SMTP mail server Your SMTP mail server name will typically be named "mail.XXX.com" where XXX is part of your email address, such as name@XXX.com. Your SMTP server name can also be found in the setup information for your normal email program, such as Eudora or Microsoft Outlook. All email programs require a SMTP server host name (or IP address) before they can send email. So if an email program is installed on the computer, the SMTP that it uses can be found. For example:

Eudora:

Tools / Options / Sending Mail / SMTP Server:

Outlook Express:

Tools / Accounts / Mail / Properties / Servers / Outgoing mail (SMTP)

Outlook:

Tools / Options / Mail Setup / E-mail Account / View... / [Next] / Change... / Outgoing mail server (SMTP)

Mozilla Thunderbird:

Tools / Account Settings... / Outgoing Server (SMTP) / Server Name:

Netscape Mail:

Window/Mail & Newsgroups / Edit / Mail & Newsgroups Account Settings... / Outgoing Server (SMTP) / Server Name:

The SMTP mail server name can also be specified in dotted decimal notation if wanted.
For example "10.23.231.1".

Authentication Required Your SMTP mail server may require you to use outgoing Authentication for emails. This is typically done to reduce the risk of spam email being generated.

If you are required to Authenticate, your provider will supply the required details as standard for settings for all outgoing emails.

User account, Password and Port are all required for satisfactory verification of outgoing emails. A mask of asterisks is used on the screen after entry for confidentiality.

These fields may also be required for sending SMS messages (via a provider such as Clickatell) as email is used to contact the SMS Provider.

Promote Students

This option is used to promote each student up one school year/grade and should only be selected once at the end of the school year.

After completing this process, any students who repeat their year can have their school year/grade reduced by 1. Students who repeat their senior year can have their GRADUATION DATE removed so that they are no longer regarded as 'graduated'.

Through this process, all final year students will be marked as graduated. Students who already have a Graduation Date **will not be promoted** further.

The following screen prompts are requested:

- From what final school year will students graduate?
- What is the graduation date for graduating students?
- Which school year graduates into Year 1? (eg Kinder)

BACKUP:

It is recommended that the SchoolWrite system be **backed up**, and held as an archive copy, prior to promoting students. The entire SchoolWrite folder can be copied to an archive folder away from the network - allowing access to the data as at the end of the prior year. One way to copy the complete system is to mark the folder in Windows Explorer, select **copy** (to clipboard), create a new folder and rename it appropriately, then **paste** the contents of the clipboard into the new folder.

Backup of SchoolWrite data should also be held on removable media.

Prepare New Term

Menu Option: **Students Menu - Student Miscellaneous - Prepare New Term - Prepare Student Subjects**

Student subject choices need to be setup for each term (or semester).

This function is normally performed prior to the start of a new term, to start the new term with the correct list of subjects for each student.

This process is optional, since subjects can be keyed for individual students directly into their Subject screen. However, in many cases, work can be minimised with this **Prepare New Term** function. Subjects can be **copied**, or **entered in bulk** for a school year.

This option allows:

- deleting all subjects for a nominated term and year, for one or for all school years. This is useful to ensure a clean start before commencing to prepare a term. It can also be used to clear subjects for a school year if the automatic options selected below give results not anticipated.
- copying subjects from a prior term (copying all subjects, or just some)
- Insert **core** subjects only - starting off each student with the **core** list of subjects. Sometimes additions and subtractions are made to individual students after the **core** list has been inserted. It may be easier to make small adjustments to a few students, rather than enter subject codes for ALL of them, where the bulk of the students in a year carry the same (core) subjects.
- copying **non-core** subjects - e.g. elective subjects that vary from student to student across the school year.

The selection criteria in the above **Prepare Term** screen allow a very flexible range of copying

options, to achieve the setting up of student subject choices with a minimum of effort.

When **Core** subjects or **Non-Core** subjects are requested to be copied, the **Core** subject codes must be entered by clicking on the button "**Enter Core Subjects**".

A **Core subject** is one that has been entered into the core list.

A **Non-Core subject** is defined as a subject in a student's previous term subject list, which is **not** in the core list.

UPDATE CLASS SIZES

First set the Term and Year to the desired term (***Miscellaneous Menu - Change Term/Year***)

Updating Class sizes for the current term is necessary to:

- update teachers' class sizes
- update students' subjects with teacher code.

Once this process has been completed, Subject Class sizes can be seen on the screen for each Teacher (***Timetable Menu - Teacher/Class Allocations***)

Teachers' codes are also updated on the Students' Subject & Marks screens for each student.

Year End Processes

At the end of each school year, there are a number of processes to be followed.

See [Create Archive copy of SchoolWrite](#)

For Students:

See [Promote Students](#)

See [Prepare Next Terms Timetable](#)

See [Rollover to Students and Parents](#)

See [End of Year Processes](#)

For Parents:

See [Charging Interest on Overdue Fees](#)

See [Period End and Year End](#)

For General Ledger:

See [Budget Periods & Amounts](#)

See [End of Financial Year](#)

See [Deleting Parents](#)

Create Archive copy of SchoolWrite

The best time to create an archive copy of SchoolWrite is at the end of a Semester or a Term. When an archive copy is created, **ALL** SchoolWrite data is copied (including school fees and accounts).

It is recommended that the *Archive Copy* be placed on a local hard disk (C: drive) and **not** on the network. Archive copies should not be accessible by regular users of SchoolWrite.

1. Choose a folder name for the Archive Copy (eg **SW20111** for Semester 1 in 2011)

2. Open Windows Explorer, and create a new folder on the local C: Drive

File – New – Folder

Locate the folder called *New Folder*, and rename it **SW20111**

File – Rename and type in the Archive name

3. Locate the folder where SchoolWrite resides. This could be on a network Drive (eg

F:\Users\Public\SW) Double-click on the folder so that it is *open*:



4. Click on: **Edit – Select All**

Then: **Edit – Copy**

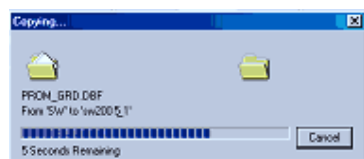
5. Now locate the new folder for the Archive Copy on the C: Drive (eg **C:\SW20111**)

Double-click on the new folder so that it is *open*:



6. Click on: **Edit – Paste**

All files will be copied:



7. Now create an icon on the Desktop to run **SW3** application in the Archive folder **SW20111**.

ICONS:

If necessary, place an icon on the Desktop to access the Archive folder (target program is SW3.exe)

End of year Processes

At the end of the school year, various automatic processes need to be initiated in a logical sequence. Some of these processes depend on the components of SchoolWrite that are currently installed.

*if the **Enrolments** component is installed,*

Promote Students needs to be initiated first

THEN

Rollover Enrolments to Students to Parents

The sequence is significant here, because each student is automatically promoted one grade - and this should be done before enrolling students are rolled over into the student body!

The sequence of events to be initiated, to prepare for a new school year follows the logical path of:

1. Take a full backup of the SchoolWrite system, and keep in archives, marked as "**End of school year**".
2. Ensure all students leaving/left school either are in the school's FINAL YEAR, or have a Date Left School entered
3. Promote all students (see [Promote Students](#))
4. Prepare New Term - (see [Prepare new Term](#)) for entry of subjects and marks
5. Transfer graduates to Past Students.

or if the Past Student component is NOT installed,

5. Delete graduated students.
6. **Parent School Fees End of Period** should be selected. Then **Parent School Fees End of Year**. Take note of the on-screen explanations of those parent fees transactions which will be deleted. The **End of Year** option deletes all parents transactions that have been printed on a Statement, and replaces them with a single '**Balance Forward**' entry.

If the Enrolments component is installed,

7. **Rollover** accepted Enrolments to Students and Parents. Print MATCH PARENTS CODES Report. Check the Parent Codes, and

a) Adjust Parent Codes where necessary

b) Do Rollover Now

8. **Delete parents** without students at the school (optional). Parents whose children have been removed from the Student system, may be kept for mailing list purposes. Certainly they will stay if they have a balance of fees owing.

9. Change the **Term Commencement Dates** for the new Year - [Miscellaneous Menu - Control](#)

Information - Profile Setup

If the SW Money General Ledger component is installed,

10. General Ledger **End of Period** Processing should first be selected. Then General Ledger **End of Financial Year** Processing. The Year End option must be selected, as soon as the final date for the year end is reached. Once this process has been run, adjustment entries for the old year may still be made, and reports printed.

If the SW Money Payroll component is installed,

11. Payroll **End of Month** Processing should be selected. **Do not** select Payroll **End of Year** option if the end of the tax year is a different date to the end of the school year.

STUDENT SUBJECT CHOICES FOR NEW YEAR

Prepare New Term - Term 1 in the new year for entry of subjects. One School year at a time, set up the subject choices for the new term. Junior grades may have core subjects inserted for ALL students in that grade. Senior grades MAY have subjects copied from the last term in the old year.

TIMETABLE ENTRIES

Teacher/Class Allocations for the new year should be entered.

a. Old-year allocations may be adjusted

OR

b. or start afresh with an empty table of Allocations.

Select ***Timetable Menu - Prepare NEXT term's timetable.***

1. Clear Next Term's Teacher/Class Allocations

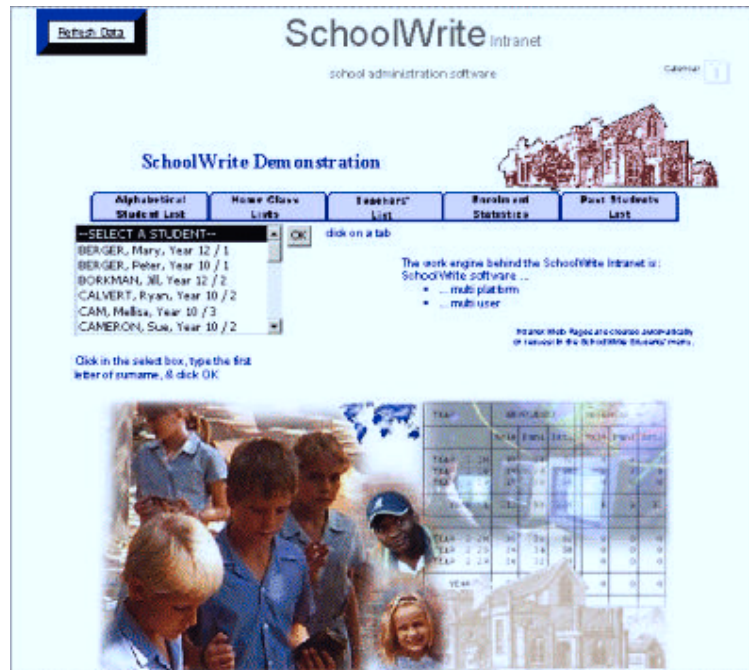
OR

2. Copy current Allocations to NEXT term.

When all Allocation for the new term are correct, Use the Option "Copy Next Term's Teacher/Class Allocations to current"

Accessing the SchoolWrite Intranet

The **SchoolWrite intranet** provides browser-based access to student data from any work station on the school network. Home Class lists with photographs may be viewed and printed. Individual student details can be brought to the screen, including the student's timetable, exam results, and teacher comments.



It starts with the BIG BUTTON in the middle of the initial SchoolWrite screen. The default web browser opens up at the Intranet front page. The SchoolWrite Intranet may be accessed by work stations everywhere on the network.



The Big Button will access the built-in browser only once. After one hit, the big button becomes inactive. The Intranet Browser can then be found on the task bar.

Of course, the Intranet may be accessed from *any* standard browser, including Microsoft Internet Explorer and Netscape Navigator. For browsers, the default page is INTRANET.HTM in the SchoolWrite folder.

If a user accesses the Intranet and wishes to go to SchoolWrite for data entry or other enquiries, **two** windows will then be open. The task-bar will allow the user to move between the two windows.

The SchoolWrite Intranet is secure, because data changes are made in the password-protected background work engine i.e. SchoolWrite software.

User access is open to the Intranet, and no passwords are required. The information displayed does not include confidential financial data and personal notes.

The School Calendar is available on the Intranet, with one year to a view, high-lighting days with appointments and school holidays. One month to a view is obtained by clicking on and individual month. Details of the month's appointments are active links in each day of the month.

Intranet Calendar pages may be printed from all web browsers to produce a summary of school appointments in the month.

Refreshing the Intranet

Student details displayed on the Intranet are updated in real time – that is address changes, phone numbers, emails, exam marks and calendar appointments are updated in real time.

The Intranet page change is immediate for these details. However, the *Refresh* option is needed to *initialise* pages for teachers and past students, and to update Home Class lists. All Student details are refreshed in the *refresh all* option.

Select **Student Menu - SchoolWrite Intranet - Refresh ALL Intranet pages**. This process will run the background, allowing other enquiries and data entry to proceed.

The **columns** for each Intranet page are set, along with the font size to be used, in the following refresh options. After changing column settings, the **Process** button should be clicked.

Refresh Home Class Lists:

- Print Student ID (Y/N) - ie Student Number
- Print Year/Grade (Y/N)
- Print Sex (Y/N)
- Print Date of Birth (Y/N)
- Print Sports House (Y/N)
- Print Enrolment Date (Y/N)
- Print Address (Y/N)
- Print Phone Numbers (0 to 99)
- Print Photo (Y/N) (A pixel height of 120 is a good thumbnail size)
- Page break every nn records
- Lines at bottom of page

The last 2 options help to format the final output on a browser. This helps to control page lengths if the browser is being used to **print** class lists with photos.

Refresh Teacher Intranet pages:

- Print Sports House (Y/N) eg shows Sports House coordinators
- Print Year (Y/N) eg show year coordinators
- Print Home Class (Y/N) eg shows Home Class teachers
- Print Teacher's code (Y/N)
- Print Photo (Y/N) (A pixel height of 120 is a good thumbnail size)
- Page break every nn records
- Lines at bottom of page

The last 2 options help to format the final output on a browser. This helps to control page lengths if the browser is being used to **print** class lists with photos.

Refresh Past Student Intranet pages:

- Print Alumni Year (Y/N)
- Print Date of Birth (Y//N)
- Print Graduation Date (Y/N)
- Print Final Year (Y/N)
- Print Mailing address (Y/N)
- Print Phone numbers (Y/N)
- Include Alumni years above eg 2000
- Print Photo (Y/N) (A pixel height of 120 is a good thumbnail size)
- Page break every nn records
- Lines at bottom of page

The last 2 options help to format the final output on a browser. This helps to control page lengths if the browser is being used to **print** class lists with photos.

External Web server:

Intranet pages may also be published to a web server. It is recommended that care be taken in publishing children's photographs, home addresses, or home phone numbers. The world wide web is not a safe place for such information compared to the confines of a school intranet.

An Internet Service Provider will be able to assist with setting up Web Pages on the Server. The SchoolWrite Web Pages will need to be made available to the Server, either on-line or periodically updated.

The Server will need to have a sub-directory created called **IMAGES**. All files in the SchoolWrite subdirectory IMAGES must be copied to the IMAGES sub-directory on the Server. All file names should be in lower case on the Server. This is important as many Servers are Unix based, and are therefore case sensitive.

All .htm files from the SchoolWrite directory must be copied to the Server web page directory (ie the parent directory of IMAGES), as well as the following files:

- stmenu.gif
- kids.gif
- school.gif

Parents Details

This is the major screen of information about each parent. The parent name(s) appearing on this screen should be the ones who are paying school fees.

SchoolWrite provides for split families where the parents have separated or the student is in the care of a guardian. Extra copies of accounts information, of end-of-term reports, and of parent letters may be sent automatically to the Additional Parent addresses.

Asterisks appearing before the additional address buttons indicate that data has been entered here and is available when the button is clicked.

SEARCH: The first Search option searches on Parent Code. The search is narrowed as more and more letters of the Parent Code are keyed.

When the Parent Code search is skipped (by hitting ESC), the second search is based on *Name*. Any part of the name is keyed to display all names that match. *Note* Parent Additional Names are also checked for a match - the Parent Name (which may be different to the Additional Name) will be displayed.

Quick-view Student buttons. There is a Student picture button towards the top of the screen. Each button has the student's name and photo when available. By clicking on this button the Student Screen becomes visible at the same time as the Parent screen. Photo-buttons display student details in similar way to the Student button (see below), with the added benefit of leaving both Student and Parent windows open together. When another student button is clicked, the new student details replace the details in the Student window.

If the Quick-view Student button is absent, it means that there is no Student on file with this Parent code.

Fields on Parents Screen

- Code** This field represents the unique identifying code for the parent. The code consists of up to 7 alphanumeric characters. A good system to use is: five characters of the surname and the first initial (6 characters); if the code is not unique add a trailing digit.
- Name** Both the father's and the mother's names are recorded here (Father on the left of the screen, Mother on the right). Usually first names are recorded here since a separate mailing title is entered further down the screen. 30 characters are available for each

	name.
Nationality	The nationality of both father (left hand side) and Mother (right hand side) are recorded here.
Occupation	20 character for occupation - 1 for father, 1 for mother
Employer	20 character for occupation - 1 for father, 1 for mother
Title	This is the formal mailing title for the top of an address. (Mr & Mrs ..etc)
Street	30 characters for the street name or first line of the mailing address.
Town	30 characters for the Town or suburb. This is the second line of the mailing address.
Country	This address line may be left blank. This is for the Country, or the third line of the address.
Postcode	The Postcode is entered here. The <i>definition</i> of the Postcode (length, numeric or alpha) can be changed in the Miscellaneous Menu - CONTROL INFORMATION - PROFILE
Salutation	30 character salutation, included in Standard Letters to Parents.
Residence / Notes	If the residential address is the same as the postal address, it may be left blank. If the postal address is a Post Office Box, then the residential address should be completed.
Optional Parent Categories	Two optional Parent Categories (user defined). Each parent may have either 'Y' or 'N' in each categories. eg Deferred Payment parents (DEF PMT).The optional Parent Categories are defined in the Miscellaneous Menu - CONTROL INFORMATION - PROFILE screen

Phone:

Phone numbers for the **family** are shown. All students with the same Parent Code share the same family phone numbers with the parents. Phone numbers, fax numbers and mobile phone numbers are all listed here. There is no limit.

Name: The name to whom the contact number applies.

Description: Description of the contact number

Phone number: The phone or fax number

SMS Notify?: Y/N indicator to show if this phone number should be sent an automatic SMS message (see Communicate with Parents).

Email:

Email addresses for the **parents**. (Students email addresses are separate to this list). There is no limit.

Name: The name to whom the email applies - usually the Parent's name

email address: The full email address.

Quick Send SMS & Email:



Quick-send SMS and/or email to the current parent. The family email addresses and phone numbers are displayed to enable a selection to be made. A single short message is entered and sent.

See [Quick-Send SMS / email](#)

Students:

The names of students in the family are displayed - ie students who have the **Parent code** of this Parent. If a student name in the list is **selected** the Parent Details screen is suppressed and is replaced by the Student Details screen. The same Parent Details screen will be re-displayed when the **Parent (F2)** button is clicked in the Student screen, or the **Parent icon** on the top tool bar is clicked.

Family Notes:

Notes regarding the **family** are shown. All students with the same Parent Code share the same family notes. There is no limit to the length of the Notes. This area is passworded, and only the password with *update* privileges may change the notes. *Display* privileges may view the notes, whilst the Family notes button is removed for *No access* passwords.

First and Second Additional Parent Addresses

Title	30 characters to record the mailing title for the additional address. If this field has anything other than spaces, the screen will show an asterisk beside the Additional address 1 button.
Street	30 characters for the 1st line of address
Town/State	26 characters for the town or suburb. This is the 2nd line of address.
Postcode	Postcode is entered here, and not in the Town/State line above.
Residence /Comments	If the postal address above is a Post Office Box, then this should be the residential address. Or this line may contain general comments (eg Access right to children, etc)
Receives statement of accounts	'Y' for yes will ensure that a duplicate statement is printed for the additional addressee.
Receives school report	'Y' for yes will ensure that a duplicate end-of-term Report is printed for the additional addressee.
Receives mailings & verification	'Y' for yes will ensure that a duplicate copy of the Parent Verification report will be printed for the additional addressee. Duplicate copies of standard Letters will also be printed.

Parent financial details

FIELD DESCRIPTIONS

Family subsidy % or \$	This is used to specify a particular family discount for. This field is used in the automatic Billing of school fees. The discount is applied as an OVERRIDING DISCOUNT after all other discounts. ie Scholarships / Bursaries are discounted, Sibling discounts are deducted, and THEN the Family Subsidy is calculated. The Family Subsidy may be EITHER a calculated % OR a fixed \$ amount.
Billed automatically?	The answer to this question defaults to Y - to start with. A parent may be stopped from being included in an automatic billing run, by changing the answer to N .
Charged Interest?	Y for yes will enable the school to charge interest on any outstanding balance if desired. N for no will prevent this particular parent being charged interest during a 'Charge interest' run for all parents.

The following information is display only, and cannot be changed (other than through adding further charges and bankings.)

Outstanding balance	This is the current owing for school fees, or the amount in credit.
Previous Year's Contributions	This is display only. It is information on previous activity related to the donation funds (eg Computer Fund and Library Fund).
Current Year's Contributions	This is display only. It shows current total of Computer Fund and Library Fund contributions made by the parent during the current year.
Number of Years	This displays the total number of years since the last Computer Fund or Library Fund contribution. The parent may continue to make contributions after students have left school. If donations have been received in the current year, this figure is zero.

Detailed transactions may be seen for:

<F4> Fees transactions

and

<F5> Computer Fund

and

<F6> Library Fund (Donation Fund 2 name, defined in Account Numbers Setup)

and

<F9> USD Fees (2nd Currency fees, when activated in Account Numbers Setup)

Note: When transactions are being browsed on the screen, only the **printed flag** may be changed. The column heading is in a darker colour to indicate this.

<F7> Print Letter: A standard letter may be sent to the current parent. Once the letter has been selected from the list of standard parent letters, it is automatically created for the current parent, and previewed on the screen.

<F8> Statement: The Statement of fees owing is previewed on the screen, for the current parent. After viewing second currency fees (F9 option - when activated), the Statement is for second currency fees. After viewing main school fees (F4, F5 or F6 options), the Statement printed is for main school fees.

Parent printouts and graphs

The system will request certain parameters for each report. These parameters will typically consist of:

- Parents between Starting and ending Parent codes
OR
- Parents with students between starting and ending school year (with optional Home Class) If a parent has more than one child in the nominated year range, the parent will appear only once in the printout.

The group of parents thus selected may be *further* limited by selecting other criteria, such as:

- Parents in one or other of the Optional Parent Categories
and/or
- Parents with outstanding balances above a nominated amount
and/or
- Only parents with current students

Refer to [Printout Requests](#) for the options that may be selected for printing or previewing printouts and reports.

Refer to [Printer Settings](#) for options that change the appearance of the printout, including school logos and watermarks.

Refer to [Previewing Reports](#) for the options available to control the on-screen preview and optional printing of a report.

Graphs:

The Parent graph options are:

- Outstanding balances
- Age of outstanding balances
- Cash Flow from Debtors

Each graph is based on the complete Parent fees transactions database. There are no selection criteria to limit the scope of a graph.

Printing Graphs:

Graphs are displayed in *print preview* mode, ready for printing.

Refer to [Previewing Reports](#) for the options available to control the on-screen preview and optional printing of a graph.

Deleting Parents

Before a Parent can be deleted from the system, all transactions for that Parent must first be totally deleted. A parent will *not* be deleted if there are *any* transactions present - even if they add up to Nil.

For deleting Parent transactions, see Period End

Parents do not *need* to be deleted from the system. Some users of the SchoolWrite system keep "Parents" on the system for mailing list purposes. These "Parents" may be allocated to one of the optional parent categories, if appropriate. eg MEMBER (of school association).

(Note: "Parents" with no students at the school can be printed separately - select **Parents menu - Printouts & Reports - Parent Listing** and tick the option: *Print only Parents with **NO** students at school*)

However, if there is no need to keep Parents' information once the student has left school, they may be deleted from the system. There are two ways to delete parents. First, an individual Parent may be deleted by using the Delete option on the bottom of the PARENT DETAILS screen. Secondly, select **Parents Menu - Delete Parents**. this menu option will delete *all* parents who match certain criteria, in one action.

The criteria that a Parent must meet before being DELETED are:

- o No Student record is found with this parent's PARENT CODE
- o There are NO fees transactions for this parent. ie the Fees Transactions screen is empty. Check this at **Parents Details - Financial Info - F4 Fees Transactions**

NOTE: The BUILDING FUND TRANSACTIONS screen **may** display transactions, and the parent still matches the DELETE criteria.

- o The number of years since a contribution to the Building Fund was made is at least (eg) 3. ie there have been no new contributions in the last (eg) two years. Check this on **Parents Details - Financial Info - F5 Building Fund Transactions**. The number of years since last contribution may be altered on the Delete Parents screen.

The option is given to keep Parent name and address details on the Past Students database with *Transfer Parents to Past Students* (tick if required). This must be ticked to transfer Parents, otherwise their name and address details will be deleted.

(Parents whose details are transferred to Past Students may be identified under 'Graduation Details', where 'P.O.P.S.' (Parents of Past Students) is shown under 'Reason for leaving'. Their Alumni Year is set to zero. A separate listing of P.O.P.S. may be printed by requesting Alumni Years 0 [zero] to 0 [zero].)

SMS / email / Letters

There are 3 ways to communicate globally with Parents.

- SMS
SchoolWrite sends emails to a commercial Provider of email to SMS services. The provider receives the emails with destination phone numbers included, and automatically sends them to each parent's cell phone.
- email
Emails are sent direct to parents' email addresses when they are appropriately marked to receive automatic emails.
- standard letters
Standard letters are addressed to the parent, either via the oldest child's Home Class, or direct to the home address. Standard letters include merged data specific to each parent.

Communicate with Parents

Entry screen for communicating with Parents

The entry screen is found in *Parents Menu - Communicate with Parents*.

Parents are selected by

- range of Parent codes, and
- Parent categories, and
- Parent balances over a specified amount

OR

- parents of Students in a nominated range of school grades and/or Home Classes.

Parents that have been selected can be sent:

- an SMS message
- an email
- a standard letter
(any one, two or three of the above may be sent).

Note: Selected parents to receive an email will have **Notify (Y/N)** set to **Y** against at least one of their email addresses (see *Parent Details screen*). Parents to receive an SMS message will have **SMS Notify (Y/N)** set to **Y** against at least one of their phone numbers.

Sending SMS/email notifications

Left side is for sending SMS messages Right side is for sending emails

Emails & SMS are sent using email, either (a) Microsoft Outlook, Outlook Express, Thunderbird, or Eudora, OR (b) a free webmail service (Gmail, Hotmail or Yahoo). No technical knowledge is required for set up.

Email and SMS parameters are setup in *Miscellaneous Menu - Setup email / SMS*. [Click here for help on setup.](#)

Send SMS Notifications: SMS message

The text of the SMS message is entered or adjusted in the message box. The message can have substitution data inserted with Parent-specific data. The Substitution codes (from Parent Standard Letters) that may be used are:

- ^0 - the DATE of the Absence
- ^8 - the Student name(s)

The text must be less than 160 characters, including the insertion of DATE and NAMES.

Send email Notifications:

Email text

The drop-down list reveals all available Parent Standard Letters. The appropriate letter that has been set up for email notifications should be selected. Emails may be setup or modified in *Parents Menu - Parent Standard Letters - Maintain Standard Letters*.

Attachment

The file name of an email attachment is specified here. Eg a .pdf file or a Microsoft Word file. The file must be present in the location indicated. This same attachment is sent to all Parents - eg a newsletter.

Subject line

The Subject Line is seen in the In Box of the email recipient. The Subject Line can have substitution data inserted with Parent-specific data to distinguish the email so that it is not rejected as SPAM. The Substitution codes (from Parent Standard Letters) that may be used are:

- ^0 - the DATE of the Absence

^8 - the Student name(s)
^1 - Parent salutation
^2 - Parent mailing title

F4 Proceed: All unsent SMS and emails are sent, unless they are marked **Hold**. The date and time of sending are automatically placed in the right hand columns of the "Preview email notifications" table.

For both SMS and email notifications, SchoolWrite sends the messages in the background. The internet must be connected to the workstation.

Sending Standard Letters:

See [Parents Standard Letters](#) for details.

Quick-Send SMS / email

This option is accessed from the Quick-Send icon on the Student Details screen, the Parent Details screen, or the Past Student Details screen.



A list of family phone numbers and emails is displayed to enable a selection to be made. When the Quick-Send icon is accessed from the Student Details screen, student's email addresses are also displayed in the selection list.

Select each cell phone number and email address on the left side of screen, and click on the *right-arrow* in the centre of the screen to move them across to the right side of screen (*Selections*). Any number of email addresses and phone numbers may be selected. Click on **OK** ...

A single short message is entered on the left side of screen. If cell phone numbers and email addresses have both been selected, then the left and right side of screen is active. If only one is selected, then the appropriate half the screen is active and the other half is greyed out.

Click on F4 Proceed to send the messages. Note: the workstation must be connected to the internet so that emails can be sent.

List of emails/SMS sent

A list of items sent may be obtained from *Parents Menu - Communicate with Parents - LIST ONLY button*. Items that have been sent are in red, and will display "*Quick send option used*".

A printout of items sent is requested by clicking on the List button at the top of the window. The printout should be selected for items sent. The printout serves as a log of emails/SMS sent.

Email and SMS parameters are setup in *Miscellaneous Menu - Setup email / SMS*. Click [here for help on setup](#).

If the Setup for Email and SMS has not yet been done, the Quick-Send screen will give a reminder with the option to go directly to the setup screen.

Absentee email notifications

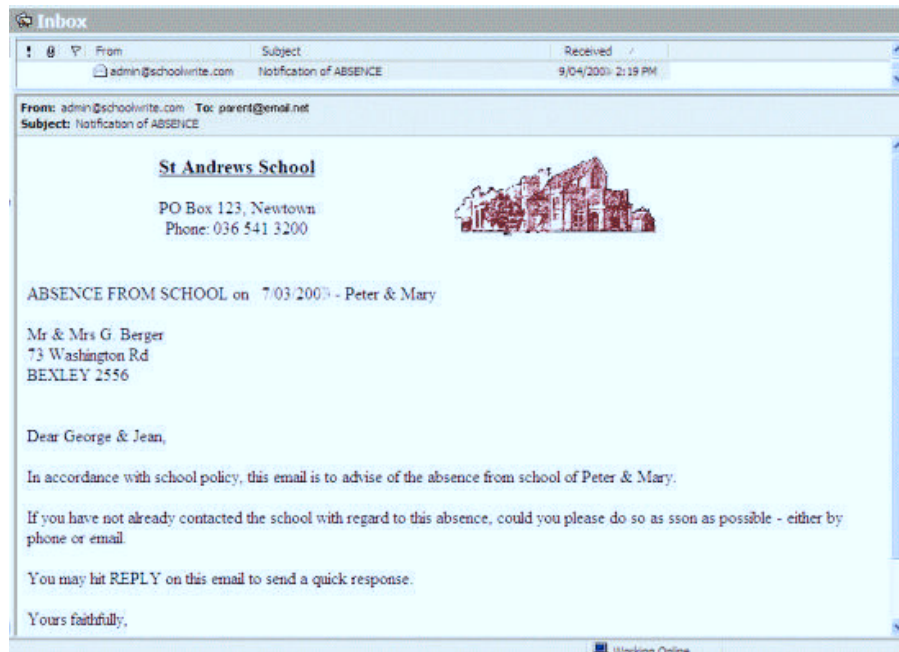
Email notifications are sent automatically to parents whose children are absent from school.

Only those parents who wish to be notified will receive these emails.

Student attendance/absentee details are entered in the usual manner, via the *Attendance button* on the Student Details screen. An option is provided to set EMAIL NOTIFY to **Y**(yes) if the absentee warrants a notification. Some absentees may not need the parent to be notified.

A list of emails to be sent is automatically generated. The option is given to preview and list the pending emails, and to make any changes, before automatically **sending** emails to everyone on the list.

EMAIL RECEIVED BY THE PARENT



Email notification - as it appears in the parent's InBox

The text of the email is set up using the Parent Standard Letter form. Substitution codes are inserted in the standard email, to bring Parent-specific data into the text, eg Salutation, name & address, student names, etc

SENDING ABSENTEE EMAIL NOTIFICATIONS

PREPARATORY STEP:

Ensure Parent email addresses are marked with **Notify Absence** where appropriate. Notifications may be sent to multiple email addresses for one parent. See Parent Details screen - Parent E-mail button. **Notify Absence (Y or N)** is set after each email address.

DAILY:

ENTER ABSENTEES. As Absentee records for students are added, the **Email notify** flag will default to **Y** if the parent's email address is marked for *Notify absence*. If the parent does not have an email address marked for *Notify absence*, the student's **Email notify** flag always defaults to **N**.

STEP 1:

Prepare emails for a nominated date of absence by clicking on the **Prepare emails** button or by hitting the **F4** key. The processing for this step is done in the background. A progress bar is visible at the top of the screen while it is taking place.

Absentee SMS/email notifications

ESC=Quit

Starting Year:

Ending Year:

Home Class: (leave blank for ALL)

Absent on:

Send notifications: ☒ SMS ☒ emails

F4 Prepare SMS & emails

Step 1: Mark Parents cell phone numbers with NOTIFY. Step 4: F4 Automatically prepare messages to Parents for given absentee date.

Step 2: Mark email addresses with NOTIFY Step 5: F5 Preview items to be sent

Step 3: Enter student absentees with NOTIFY. Step 6: F6 Send notifications now.

Absentee notifications are previewed prior to being sent. The 'HOLD' flag on each absentee record may be changed prior to being sent.

F5 Preview & List SMS & emails F6 Send SMS & emails

Note: When 2 or more siblings are absent on the same day, only one email notification is sent. If the **student name** is included in the email, then student names for all siblings with absentee records are included.

Preview emails. Emails are presented in date order, showing the most recent entries at the bottom of the list. These are in GREEN if the emails are ready to send, they are in RED if they have been sent, and they are in YELLOW if they are on hold.

Changes may be made to most of the columns, prior to sending emails. eg email address may be amended.

Individual records may be placed on HOLD. Emails for records on Hold are not sent.

When **"Date sent"** is deleted, the record changes from RED (sent) to GREEN (not sent).

A printout is requested by clicking on the **List** button. The printout is for a *nominated date* **or** for *all dates, for emails to be sent* **or** for *emails sent*. The printout serves as a log of emails sent, or as a check sheet prior to sending emails.

STEP 3:

Send SMS and emails.

**Absentee SMS
Notifications:**

SMS message

The text of the SMS message is entered or adjusted in the message box. The message can have substitution data inserted with Parent-specific data. The Substitution codes (from Parent Standard Letters) that may be used are:

- ^0 - the DATE of the Absence
- ^8 - the Student name(s)

The text must be less than 160 characters, including the insertion of DATE and NAMES.

**Absentee email
Notifications:**

Email text

The drop-down list reveals all available Parent Standard Letters. The appropriate letter that has been set up for email notifications should be selected. Emails may be setup or modified in *Parents Menu - Parent Standard Letters - Maintain Standard Letters*.

Subject line

The Subject Line is seen in the In Box of the email recipient. The Subject Line can have substitution data inserted with Parent-specific data to distinguish the email so that it is not rejected as SPAM. The Substitution codes (from Parent Standard Letters) that may be used are:

- ^0 - the DATE of the Absence
- ^8 - the Student name(s)
- ^1 - Parent salutation
- ^2 - Parent mailing title

F4 Proceed: All unsent SMS and emails are sent, unless they are marked **Hold**. The date and time of sending are automatically placed in the right hand columns of the "Preview email notifications" table.

Email and SMS parameters are setup in *Miscellaneous Menu - Setup email / SMS*. [Click here for help on setup.](#)

Parents Standard Letters

Standard letters are set-up by selecting:

Parents Menu - Parent Standard Letters - Maintain Standard Letters

The one letter can then be printed for each parent in a selected group. The standard letter includes merged data for each parent at the desired places.

MAINTAIN PARENTS LETTERS

When Maintain standard letters is selected, a name must be assigned to a new letter being created, **or** an existing letter can be retrieved from disk. Parent letters should be stored in the SchoolWrite folder.

Once the name of the letter has been established, a window opens for the text of the standard letter to be keyed.

A *Spell Check* button is located at the bottom of the screen, when the Dictionary is available. See [Spell Check Options](#) for further details.

Underneath the window is a list of possible insertion codes which may be included in the letter. All insertion codes begin with the '^' (carat) character, found on the shifted numeral 6 key.

Insertions

^0	Processing date
^1	Salutation (Dear ...)
^2	Mailing Title
^3	Mailing address 1
^4	Mailing address 2
^5	Mailing address 3
^6	Fees outstanding
^7	Current year Building [& Library Fund] amounts
^8	Student name(s)
^9	2nd Currency outstanding fees (when activated)
^.<lc>	Forces lower-case with starting capitals
^.<uc>	Forces upper case

For example:

^0
^2<lc>
^3<lc>
^4<UC>
^5<UC>

Dear ^1,
May we please request payment for your outstanding school fees of \$^6!
In these difficult financial times, we would appreciate your quick response.

PRINTING STANDARD LETTERS & LABELS

Letters & labels to be printed are selected by:

- Parents between Starting and ending Parent codes
OR
- Parents with students between starting and ending school year (with optional Home Class)

The group of parents thus selected may be *further* limited by selecting

- Parents in one or other of the Optional Parent Categories and/or
- Parents with outstanding balances above a nominated amount and/or
- Only parents with current students

If a parent has more than one child in the nominated year range, only one letter or label will be printed for that parent.

Eg If the \$ value is left at zero, then *all* parents are eligible for being printed (depending on their children being in the nominated year range).

Printout characteristics for Letters:

Left margin: the number of letters or characters to leave on left of page. The default is 5.

Line length: the number of characters in a line. The default is 93.

Font: A drop-down list offers the choice of Arial, Courier New, and Times New Roman. The default is Arial.

Font size: The height of the chosen font, in pixels. The default is 12.

Generate Letterhead graphics: If ticked the SchoolWrite letterhead is generated. If not ticked, space is left at the top of the page (approx 2cm) for pre-printed letterhead.

To check the format of the standard SchoolWrite letterhead, select Letterhead Graphics. See [*Miscellaneous Menu - Letterhead Graphics*](#).

Label settings:

The following settings may be adjusted to suit the layout of the blank label stationery being used.

3 Across: the number of labels across the width of the page. The default is 3.

5 Down: The number of labels vertically down the length of the page. The default is 5.

Font size: The height of the chosen font, in pixels. The default is 12.

Left margin: The left margin gap, in millimetres. The default is 0. Allow for the non-printing area of your printer.

Top margin: The top margin gap, in millimetres. The default is 5. Most printers have a non-printing area at the top of a page, and this must be catered for.

Label size, including gap:

These two measurements - height and width in millimetres - are usually shown by the label manufacturer on the packaging of the labels.

Vertical Gap: vertical gap between labels - ie the height

Horizontal Gap: horizontal gap between labels - ie width

School Banking, Charges & Adjustments

ENTER BANKING

This is found in **Parents Menu - School Fees Menu - School Banking:**

Three kinds of receipts may be entered on the one screen:

- Payments received that are associated only with Fees statements
- Donations to the Special (eg Building) Funds
- Sundry payments received that are NOT associated with the above

A receipt may be printed, if required, after each entry of money received. Payments made against a parent's school fees are immediately credited to the parent's Fees Statement. However the Bank Deposit Slip is held over, to be printed at a time when the funds will be physically taken to the bank. An Audit Trail of all transactions, and postings to the General Ledger are made only when the Bank Deposit Slip is printed.

Payments of school fees and Sundry payments are both paid into the main bank account. Donations to Special Funds are split from this total, and credited to separate bank accounts. The split between bank accounts is handled automatically when the Bank Deposit Slip is printed.

SETUP OF BANK DEPOSIT CONTROLS:

One item is setup in the Miscellaneous Menu - Control Information - Account Numbers.

No. of Bank Dep Req:

This entry determines the number of BANK DEPOSIT SLIPS printed by the system when completing a series of Banking entries. If two Bank Deposit Slips are required (one for the Bank and one for your file) enter 2 here.

ENTER MONEY RECEIVED:

Enter Money Received	
Esc=Quit	
Parent code	BEAZLJ Mrs J. Heazlett
<input type="checkbox"/> Student Search	
Details	Payment rec'd
Transaction date	29/05/2016
Amount paid	
Fees	980.00
Building fund	120.00
Library fund	0.00
Sundry payment #1	35.00
Sundry payment #2	0.00
Sundry payment #3	0.00
Total	1135.00
Transaction lookup: F4 Fees F5 Building fund F6 Library fund	
Fees owing before this payment: 2,115.00	
Fees owing after this payment: 1015.00	
Paid by cheque	1100.00
Paid by cash	35.00
Total	1135.00
Cheque drawer's name Mrs J. Heazlett	
Bank CBC	
Branch Marigold	
Normally the day that payment is received.	
Clear PgDn=Save	

FIELD DESCRIPTIONS

Parent code:

This field requires the 7 character code to identify the parent from whom the payment has been received. A select list of codes in Parent Code alphabetical order, displaying Parent names and addresses. If the **Student Search** check box is ticked, the select list displays Student names and school years alongside Parent codes.. Partial keying of the Parent code, and hitting <Enter> is sufficient. If the select list is open, by clicking on the arrow, keying the first letter of the Parent Code moves to that point in the alphabetical list.

When a parent Code is selected, an amount is displayed for ***Fees owing before this payment.***

The **F4 Fees** button and the **F5 Building Fund** and **F6 Library Fund** buttons become active once the Parent code has been keyed. These buttons provide transaction lookup for the nominated Parent Code.

Details:

15 characters are available to record details about the transaction. **Payment rec'd** is the default.

Date:

The date of the transaction is keyed here. The date defaults to the processing date.

Fees:

The amount of the fees payment is entered here. If a negative value is entered, the system accepts this as an adjustment banking.

Building fund & Library Fund:

When a building fund amount is entered, separate transactions for the bank account and the building fund account are generated. Usually separate audit trail and posting report entries will be generated.

Note there is a setup option: Building Fund and Library Fund receipts may be included in Parents' School Fees statements when the option Receipts reduce School Fees balance? (Control Information - Account Numbers) is ticked. When this option is set, the notation "* Reduces Fees" appears on the screen beside the Building Fund amount. In this case, the Building Fund receipt is deducted from the Fees owing amount, and is included in the School Fees transaction list and on the printed Fees Receipt.

Negative amounts are accepted as banking adjustments.

Sundry payment #1, #2, #3:

Sundry payments are **non**-Fees and **non**-Building Fund payments. Eg payments received for telephone calls made, or for excursion costs which have not been billed on the Parent's fees account. Negative amounts are accepted as banking adjustments.

Account numbers:

Sundry payment account numbers must be a Finance Code from the select list. A valid account number may be keyed in, or selected from the select list with a mouse double-click.

The total amount received must be paid by Cheque, or paid by cash, or both.

Paid by Cheque:

An amount should be entered here if payment is by Cheque or credit card. The Cheque drawer's name defaults to the Parent's name (if a Parent Code has been selected). Either **Cheque** details or credit card details should be entered under

Bank and Branch

Paid by Cash:


The amount of the payment can be divided between **Cheque** and cash.

The total amount paid (middle section) **must** equal the total of paid by Cheque and paid by cash (bottom section) before the transaction can be saved.

PRINTED RECEIPTS:


One general receipt is printed for Fees payments and Sundry receipts, one receipt is printed for the Building Fund, and one receipt is printed for the Library Fund. Thus, depending on the items for money is entered, up to 3 separate receipts could be printed.

General Receipt:

SchoolWrite Demonstration			
P.O. Box 123, Newtown 2210			
Mrs J. Heazlett 1151 ANZAC PDE MAROUBRA 2555			
RECEIPT NUMBER: 97 10/08/2010			
AMOUNT RECEIVED: \$		190.00	
HEAZLI			
For payment of SCHOOL FEES:			
PAID		BALANCE OWING	
Payment on Account		150.00	
TOTAL SCHOOL FEES STILL OWING		1,545.00	
SUNDRY AMOUNT RECEIVED:			
For INTEREST		\$ 40.00	
For and on behalf of SCHOOLWRITE DEMONSTRATION			

Building Fund Receipt:

SchoolWrite Demonstration
P.O. Box 123, Newtown 2210



Mrs J. Heazlett
1151 ANZAC PDE
MAROUBRA 2555

Computer Fund RECEIPT NUMBER: 1411 15/01/2007

AMOUNT RECEIVED: \$	100.00	HEAZLJ
We acknowledge your donation to the SchoolWrite Demonstration Computer Fund		
For and on behalf of SCHOOLWRITE DEMONSTRATION Computer Fund		

SETUP OF RECEIPTING CONTROLS:

Two items are setup in the Miscellaneous Menu - Control Information - F8 Institution.

Parent Receipts on letterhead?

Y indicates that Parent Receipts will be printed on pre-printed letterhead. A 2 cm gap is to be left at the top of each page. **N** indicates that the SchoolWrite generated letterhead is to be printed at the top of each page. Letterhead details are set up in **Miscellaneous Menu - Letterhead Graphics**.

Number of Receipts Printed:

This controls the number of receipts printed during school banking. If a 2nd office copy is required, enter **2** here. If no receipts are to be printed, enter **zero**.

CHECK MONEY ON HAND:

The accumulation of Money Entered is held until the Bank Deposit Slip is printed. Here it is possible to review the entries made, and to reconcile the balance of funds on hand.

Money on Hand

Esc=Quit

Total Cheques
0.00

Total Cash
1,525.00

Total Money Received
1,525.00

Rec Number	Parent Code	Amount	Details	Cash Amount	Cheque Amount
94	HEAZLJ	1,025.00	Payment rec'd	1,025.00	0.00
95	KIMEP	500.00	Payment rec'd	500.00	0.00

F5 Print Audit Trail

The entries in some columns may be edited here. The columns are headed in dark blue. They are:

- Details
- Cheque Drawer
- Bank
- Branch

If **amounts** are incorrect or need to be changed, then an **adjustment banking entry** must be made. Eg a banking entry identical to the original entry, but with **minus (-)** in front of all amounts.

The **F5 Audit Trail** that may be selected here will be printed as a final Audit Trail when the Bank Deposit Slip is printed.

PRINT BANKING SLIP & AUDIT TRAIL:

When this is selected, the following pages are printed when there are transactions to be printed (eg Building Fund Receipts List is only printed when Building Fund amounts are entered). The transaction list is then cleared.

Transaction Audit Trail - showing receipt numbers and details of fees payments and sundry payments

Building Fund Receipts List - showing Receipt numbers processed

Library Fund Receipts List - showing Receipt numbers processed

General Ledger Posting Report - showing the summary of postings to each account number

Bank Deposit Report - possible more than 1 copy. See "Setup of Bank Deposit Controls" above.

SchoolWrite Demonstration				Ln: 58 : Ln: 68 / 2002	
SchoolWrite BANK DEPOSIT REPORT				PAGE	L
DRAWER	NAME	BRANCH	AMOUNT		
Mrs J. Heazlett			150.00		
Rev & Mrs P. Kime	ANZ	CHATSWOOD	500.00		
Total Cheques			650.00		
Total Cash			0.00		
Total money received			650.00		
Deposit to BUILDING FUND A/c No. 8765-4321			100.00		
Deposit to Main Account A/c No. 1234-5678			550.00		

ENTER CHARGES & CREDIT ADJUSTMENTS

Charges & Credit Adjustments to Parents' Fees accounts allows single transaction adjustments to be made, one at a time. Each transaction entered adjusts the balance of the Parent's Fees outstanding, and may be a debit or a credit adjustment. This option is typically used to:

- take up an initial Parent's Fees balance
- write off a balance owing
- adjust a Parent's account with a discount

Other entries or transactions are made by means of other menu options:

- Enter payments (Banking)
- Automatic Billing
- Charge Interest

This is found in **Parents Menu - School Fees Menu - Enter Charges & Credit Adjustments.**

Account Number:

A valid account number (Finance code) may be keyed in, or selected from the select list with a mouse double-click

Parent Code:

This field requires the 7 character code to identify the parent for whom the charge or adjustment is being made. A select list of codes in Parent Code alphabetical order, displaying Parent names and addresses. If the **Student Search** check box is ticked, the select list displays Student names and school years alongside Parent codes.. Partial keying of the Parent code, and hitting <Enter> is sufficient. If the select list is open, by clicking on the arrow, keying the first letter of the Parent Code moves to that point in the alphabetical list.

When a parent Code is selected, an amount is displayed for **Fees owing before this payment.**

The **F4 Fees** button becomes active once the Parent code has been keyed. This button provides transaction lookup for the nominated Parent.

Narration:

15 characters are available to record details about the transaction. eg **Early bird disc.**

Date:

The date of the transaction is keyed here. The date defaults to the processing date.

Amount:

A positive amount is a **charge** to the Parent's Fees account. A negative amount is a **credit** to the Parent's account.

REPRINT LAST BANKING SLIP & AUDIT TRAIL:

The date of the **last printed** Bank Slip and Audit Trail is shown. Even if further receipts have been entered and there is "new" money on hand, the **last printed** Bank Slip is still available via this option.

This option may be used to obtain a second copy of the Audit Trail after the first copy has been printed.

Finance Codes

Parents Menu - School Fees Menu - Maintain Finance Codes

Maintain Finance Codes

Esc=Close Add Edit Delete << Previous Next >> Search

General ledger account number **2440**

Description **BANK CHARGES**

Amount chargeable

Can a discount apply to this extra charge? ☐

Is this a charge to students doing optional activities? ☒ **No**
☐ Yes - Boarder
☐ Yes - Library

Is this charge to apply only once per parent? ☐

Does this charge apply to parents without students? ☐

Is this a charge to parents in optional categories? ☒ **No**
☐ Yes - DEF PMT
☐ Yes - ASSOCH

Total amount charged for this period to date **0.00**

<DanaHins> DREVIQHS NEXT <DanaHins>

Fields on Finance Code Screen

General Ledger account number

The School System is interfaced to the General Ledger through the use of this account number. This code is the same number as is used in the General Ledger.

Description

The description for this code prints on Parents Statements and should be a little more 'user friendly' than the more formal accountancy terms given to General Ledger codes. eg 'Sundry Debtors' in the Ledger might be 'Parents' in these Finance Codes.

Amount chargeable

This attribute sets the standard charge for this finance code. This amount may be overridden at time of charging.

Can a discount apply to this extra charge?

This indicates whether or not a discount can be applied to this charge. Discounts may be STUDENT Scholarships or Bursaries, SIBLING discounts or PARENT discounts.

Is this a charge to students doing optional activities?

This attribute will only allow a corresponding charge to be debited to students who are doing *Optional Activity 1* or *2*, as shown in the selection box. These Activities are established in **Miscellaneous Menu - Control Information - Profile**. Only those Activities in use are presented as an option in the selection box. If no Activity is relevant here, the **No** option should be selected.

Is this charge to apply only once per parent?

eg school magazine
 Answering 'Y' to this attribute will cause the system to ensure that this charge is applied only once per family, regardless of the number of students currently attending.

Does this charge apply to parents without students?

Answering 'Y' to this attribute means that this code is directly related to *all* parents on file, whether they have students at school or not. All other charges in the system relate to students, so that the parent without a child at school would not usually receive any charges in an automatic billing run, with the exception of charges attached to **this** finance code.

Is this charge to parent in optional categories?

This attribute will only allow a corresponding charge to be debited to parents who are shown as being in *Optional Category* 1 or 2, as shown in the selection box. These Categories are established in **Miscellaneous Menu - Control Information - Profile**. Only those Categories in use are presented as an option in the selection box. If no Category is relevant here, the **No** option should be selected.

Does Goods & Services Tax apply to this charge?

This question is asked **if** the Goods/Service Tax % is set to a non-zero amount. See **Miscellaneous Menu - Control Information - Account No's**. If Goods & Services Tax (or VAT) applies to this charge, then it is automatically added to a total Goods & Services amount for the billing run that is added to the parent's fees account.

Total amount charged for this period to date

This field displays the period to date accumulation of charges for this particular finance code.

Automatic Billing of School Fees

This billing process may be run at any time. It debits tuition fees to each parent with students in a school Year range, and extra charges.

Tuition fees, if charged, are based on a table of school fees (updated in the MISCELLANEOUS Menu - CONTROL INFORMATION - FEES screen). Optional extras may be charged by school Year, by subject and by class. **All** school Years, all subjects, and all classes are billed if none are specifically requested.

Discounts for brothers & sisters in the same family are automatic. 'Discount percentages are set in the CONTROL INFORMATION - DISCOUNT screen. Student Scholarship discounts are automatically credited, as well as family discounts. These discounts must first be set in the STUDENT DETAILS screen, and in the PARENT DETAILS screen.

Automatic Fees Billing process is found in **Parents Menu - School Fees Menu - Automatic Fees Billing**.

It is usual to bill all school years in one automatic billing run. However, the option is given to select a group of school years. Care should be taken that Family Subsidy \$ amounts are not credited *twice* to a parent who has students in two year ranges which may be billed separately.

THE BILLING PROCESS

Note: Take care to correctly set the Processing date shown the top of the SchoolWrite screen. The Processing date defaults to the current date, and can be set in **Miscellaneous Menu - Change Processing Date**. The Processing Date is the date applicable to all transactions generated in this Billing run. *Also*, ensure that the Processing Date encompasses the dates of any **future** Enrolments .. ie the future Enrolment dates optionally assigned to Students. If a student's future Enrolment date is *later* than the Processing Date, the student will **not** be automatically billed.

First, the option is given for the automatic CHECK PARENT - STUDENT LINK process to be run.

Then system requests various items to be confirmed, or to be completed, in the following screen:

Automatic Fees Billing

Esc=Quit ☒ Bill School Fees from Year 1 to Year K

☐ Confirm each student Home Class ☐

EXTRA CHARGES

	Finance code & description	Amount	Applies to yrs		Subject	Class
			From	To		
1	235 COACH COSTS	35.00	10	10	PHYS	
2	125 TEXT BOOK FEES	51.00	12	12	GEOG	
3	230 OVAL MAINT FEES	40.00	7	12		
4		0.00				
5		0.00				
6		0.00				
7		0.00				
8		0.00				
9		0.00				
10		0.00				
11		0.00				
12		0.00				
13		0.00				
14		0.00				
15		0.00				

PgDn=Bill Now

Bill school fees:

The check-box must be ticked if school fees are to be automatically charged.

From Year K to Year 12:

The year range must be specified. It is usual to bill the whole school in one process, however it is possible to bill one school year at a time.

Confirm each student:

This establishes whether every student matching the selection criteria is to be individually confirmed for inclusion in the billing run or not. If the check-box is unticked, the billing process runs through without a pause. If ticked, the billing process will stop at EVERY student and wait for a response, to bill or not to bill each student. The **Confirm** box is usually only ticked when **some** students in a class or year are to be billed. Eg when several students out of a grade did not participate in an excursion.

Fees are billed according to the fees structure in the Fees table - **Miscellaneous Menu - Control Information - Fees**

Extra charges:

The **Finance codes** used in the **Extra Charges** part of the screen are found in **Parents Menu - School Fees Menu - Maintain Finance codes**

SUBJECT CHARGES:

eg Line 1: Billing 'Coach costs' to those students in Year 10 Physics Class A - to be billed for an excursion (\$35 each)..

eg Line 2: Billing Text Book Fees of \$51 to all Year 12 Geography students

SCHOOL YEAR CHARGES:

eg Line 3: Billing Oval Maintenance Fees of \$40 to all students in years 7 to 12.

<PgDown> - Bill Now: When all extra charges have been entered, the 'Bill Now' button is clicked. The system then commences the automatic billing run. A full audit trail is automatically generated for the billing run.

SETTING UP:

Setting up School Fee Amounts:

The standard table of school fees is stored in: **Miscellaneous Menu - Control Information - Fees** as follows:

Course	School Fees Amount	Special Fees Amount	Disc	FEE	SPEC	SCHL	BURS	DISC
Course 1	100.00		Y	110	120	160	170	130
Course 2	200.00		Y	110	120	160	170	130
Course 3	300.00		Y	110	120	160	170	130
Course 4	400.00		Y	110	120	160	170	130
Course 5	500.00		Y	110	120	160	170	130
Course 6	600.00		Y	110	120	160	170	130
Course 7	700.00		Y	110	120	160	170	130
Course 8	800.00		Y	110	120	160	170	130
Course 9	900.00		Y	110	120	160	170	130
Course10	1000.00		Y	110	120	160	170	130
Course11	1100.00		Y	110	120	160	170	130
Course12	1200.00		Y	110	120	160	170	130
13			N					

For automatic billing of school fees, the school fees amount is located for each student in the above table.

Note: When DISCOUNT, SCHOLARSHIP & BURSARY Finance Codes are set to ZERO, **no** sibling discount or student discount is calculated for the designated school Year. Family discounts may be blocked by setting the Family Discount Account number to ZERO in the **Control information - Account Numbers** screen. See [Account Numbers setup](#)

Automatic Discounts

For automatic calculation of discounts, see [Discounts Setup](#):

A) Any DISCOUNT PERCENTAGE applicable to the Student (see Student Details screen) is first applied to that student's term fees. These discounts are called SCHOLARSHIPS or BURSARIES for the individual student, and a discount percentage is recorded on the Student Details screen. Scholarship or Bursary credits are placed as a transaction on the Parent's Statement. A Scholarship is debited to one General Ledger account, and a Bursary is debited to another (as per the columns on the above screen).

B) PARENT SUBSIDY. This is set on the Financial Information screen for each Parent. It may be a % (of the total bill) or a \$ amount.

C) SIBLING DISCOUNTS. On the Discount Set-up screen the sibling discount is set to:

1. Discount % on each child (after the 1st)
2. Family Discount (% for each child after the 1st)

3. Sibling Discount amount (after the 1st)

NOTE 1: A student's Special Fees in the above table may be excluded for discounting by setting the **DISC** column to **N**.

NOTE 2: Discounts may be made on the extra charges applied during the billing run. Firstly, the Finance Code for each charge is checked to see if student discount applies to this charge. Only if this is set to **Yes** is discount applied to the charge.


NOTE 3: Student discounts and sibling discounts are shown in the form of a CREDIT entry on the Parents Fees Statement, immediately following the debit entry for each student.

NOTE 4: Family subsidies appear last as a credit on the Parents Fees Statement.

Parents' Fees Statements

Parents Fees Statements are printed from **Parents Menu - School Fees Menu - Print Statements**

SchoolWrite Demonstration
 P.O. Box 123, Newtown 2210



Mr & Mrs G. Berger
 73 WASHINGTON RD
 BEXLEY 2556

(Mary BERGER) 12/1

ACCOUNT: BERGE G
11/08/2010

PARTICULARS	DEBIT	CREDIT
15/07/2010 FEES Year 12 Mary	1,200.00	
15/07/2010 SCHOLARSHIP Mary		120.00
15/07/2010 Science Equipment Mary	35.00	
15/07/2010 FEES Year 10 Peta	1,000.00	
15/07/2010 DISCOUNT Peta		100.00
15/07/2010 School Magazine	15.00	
26/07/2010 BANK FEES PAID		2,030.00
Your Building Fund contribution would now be appreciated		
	40.00	
	OVERDUE	TOTAL
	0.00	40.00

Please detach and send with your remittance immediately.

PLEASE DETACH AND FORWARD WITH YOUR REMITTANCE TO:

SchoolWrite Demonstration

Account/Name

BERGE G Mr & Mrs G. Berger

(Mary BERGER)

Brennan Bates & Associates

0500 55 1288 Fax 0500 55 1299

Amount Paid

The sub-menu to print statements allows update of a **statement message, with optional amounts** to be charged. The two optional charges are added to the end of each Statement balance. A description may be attached to each of the amounts. The amounts are added to the statement total but NOT included in the debtors balance. ie it is a suggested amount to pay, and not part of the debtors outstanding balance.

eg "Your contribution to the Building Fund would now be appreciated \$40.00"

The sub-menu to print statements also allows update of a 2 line **Remittance message** which is be printed at the bottom of each Statement, just above the Remittance section.

eg. Please detach and send with your remittance before 10th July.

Early bird discount will apply.

OPEN ITEM STATEMENTS:

The Parents' Fees Statement will show **all** previous unpaid transactions when the **Balance Forward** option is set to 'N'. This is similar to an 'Open Item' system.

All transactions, as seen on the transaction enquiry screen, are printed on the Statement - whether the PRINTED flag is Y or N. The PRINTED flag is automatically set to Y when Statements are printed, but there is no visible effect on Statements printed.

BALANCE FORWARD STATEMENTS:

Statements may print either in Balance Forward (abbreviated) style, or with full details. This is controlled by the **Balance Forward (Y/N)** setting in the [School Profile \(Control Information\)](#) screen.

If this option is set to 'Y', then all transactions for a Parent that have previously been printed on a Statement are added into a single Balance Forward amount. The Statement prints the Balance Forward amount, followed by all new (unprinted) transactions. ie All transactions (as seen on the transaction enquiry screen) that have a PRINTED flag of **Y**, are grouped together in one Balance B/Fwd figure on the printed Statement.

Sometimes there may be a need to RESET the PRINTED flag, so that a further copy of a detailed Statement can be re-printed. The PRINTED flag can be changed when viewing on the Transaction Enquiry screen.

When the Balance Forward option is set to **Y**, a further control is available on the printout request screen:

Next Print:

- Keep transactions
- Send to Balance Fwd

Keep transactions will preserve the status of the PRINTED flag, so that a 2nd or 3rd print of the Statement will also show all transactions.

Send to Balance Fwd will set the PRINTED flag to **Y** immediately after printing the Statement details.

OVERDUE PERIOD

The Overdue Period (number of days) is set in [Miscellaneous Menu - Control Information - Profile](#). The Parents' Fees Statement will optionally break up the outstanding balance between **Current** and **Overdue**. A given number of days entered will determine what the **current period** is eg 30 days. The total of outstanding amounts older than this period is shown as **Overdue**. If '0' is entered, NO Overdue or Current break up is done and a single outstanding total is printed

Particulars for FEES:

The line of details under Particulars for an automatic FEES transaction is made up from:

- the Description of the Finance Code used for Tuition Fees (see *Parents Menu - School Fees Menu - Maintain Finance Code*,
- "YEAR (or GRDE) nn",
- the Student's first name.

The Finance Code Description can be amended to produce the required Particulars.

Letterhead:

The page may have the SchoolWrite letterhead generated, or it may have space left at the top (approx 2cm) for pre-printed letterhead. The control for whether or not Statements are printed on pre-printed letterhead is found in [Miscellaneous Menu - Control Information - Internal Codes - Parent Statements on Letterhead \(Y/N\)?](#)

To check the format of the standard SchoolWrite letterhead, select [Miscellaneous Menu - Letterhead Graphics](#).

Change printed HEADINGS:

On the Print Request screen for Parent Fees Statements, there is a button:

Multi-Language Headings

The English headings used on the Parents Fees Statement are displayed in a list - as 12-character headings and as 20-character headings. These headings may be edited, translated into another language, or adapted to suit local requirements.

The English heading should be overtyped with the required substitute heading. To restart all headings in English, erase the file **headfees.dbf** and re-print a Fees Statement. The original headings will be restored.

Email Parents Fees Statements

Acrobat .Pdf files may be created whilst printing a selected range of Parents Fees Statements. These files may be emailed direct to the parents' email addresses, when the workstation is connected to the Internet.

PREPARATORY STEP:

Ensure Parent email addresses are marked with **Notify** where appropriate. Notifications may be sent to multiple email addresses for one parent. See *Parent Details screen - Parent E-mail button*. **Notify?** (Y or N) is set after each email address.

Note: When a Parent does **not** have an email address marked as **Notify?** = Y, then the .pdf file will not be included in the email list for sending automatic emails in Step 2 below.

Create .pdf files should be 'ticked', and a destination folder should be selected, as a suitable place for storing the created .pdf files. Good housekeeping principles would suggest that a folder be created (eg in Windows Explorer) for storing these .pdf file. Note: .pdf files of the same name in that folder are over-written with the latest End-of-Term Reports. Archiving of previous .pdf files should be done first.

.Pdf files are emailed in a two-step process (see below) when **email Parents** is 'ticked'

PRINT PARENTS FEES STATEMENTS

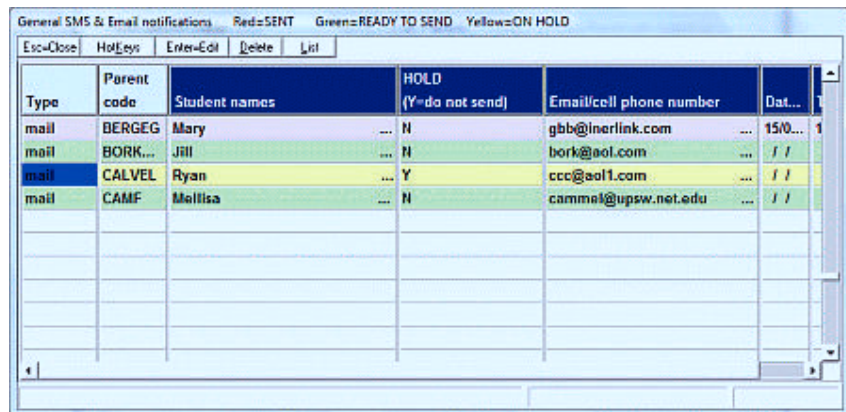
Parents Fees Statements are produced:

- as printouts
- also as .pdf file (optionally)
- and with .pdf files ready to email to Parents (optionally)

If .pdf files are required and not a hard-copy printout, then **F5 Preview** should be selected, and the preview may be discarded.

SENDING FEES STATEMENTS (.Pdf Files) BY EMAIL:

STEP 1: Preview emails



Type	Parent code	Student names	HOLD (Y=do not send)	Email/cell phone number	Date sent
mail	BERGEG	Mary	N	gbb@inertlink.com	15/0...
mail	BORK...	Jill	N	bork@aol.com	11
mail	CALVEL	Ryan	Y	ccc@aol.com	11
mail	CAMF	Melissa	N	cammel@upsw.net.edu	11

Preview emails. Emails are presented in date order, showing the most recent entries at the bottom of the list. These are in GREEN if the emails are ready to send, they are in RED if they have been sent, and they are in YELLOW if they are on hold.

Changes may be made to most of the columns, prior to sending emails. eg email address may be amended.

Individual records may be deleted.

Individual records may be placed on HOLD. Emails for records on Hold are not sent.

When "Date sent" is deleted, the record changes from RED (sent) to GREEN (not sent).

A **printout** is requested by clicking on the List button. The printout is for emails to be sent, or for emails sent. The printout serves as a log of emails sent, or as a check sheet prior to sending emails.

After printing emails **sent**, an option is given to permanently **remove the list of emails sent**.

STEP 2: Send emails

Send emails. All unsent emails are sent, unless they are marked Hold. The date and time of sending are automatically placed in the right hand columns (see Preview email notifications above). .Pdf files are sent as attachments to the emails.

There are various parameters which need to be set up once only. After sending emails, the previous parameters re-appear each time.

Test email connection button. By clicking on this button, the system checks to see if the internet connection is available and on-line. It verifies the SMTP Mail server address.

If an internet connection needs to be dialled, it should be dialled and connected before clicking on the Test email connection button, or before selecting F3 Send emails.

The results of testing the email connection are either:

Successful connection - you can send emails

or

Cannot find SMTP/POP3 server

See [Email notifications Screen](#) for details of items to be filled in on this screen.

Fees Transaction Lists

Aged Transaction Report:

Select **Parents Menu - School Fees Menu - Fees Transaction Lists - Aged Transaction Report**

A detailed or summary aged transaction report is printed. This prints all transactions in the system for each parent in the specified range. The report shows credit transactions and all debit transactions (broken up into *over 90 days*, *31-90 days*, and *current*) with a total outstanding balance.

The report prints in landscape mode.

Apply receipts to oldest debts? Aged lists may apply BANK CREDIT balances to oldest debits *or* show them separately. Discount CREDITS are aged with the corresponding debit. Options are to print Parents with outstanding balances above a nominated amount, or to print Parents in one or other of the optional Parent categories.

Display Fees Transactions:

All transactions for a parent will be displayed on the screen in order of transaction date. The parent code is first nominated from the pull-down list. The first letter of the Parent code may be typed when the pull-down list is visible - the list will jump to that starting letter.

The screen shows if transactions have been printed on a parent statement.

The only column which may be edited is the **Printed?** column.

This is the same Transaction display screen that can be accessed from **Parent Details - Financial Info - F4 Fees Transactions** and also from the **School Banking screen - F4 Fees Transaction Lookup**.

The Parent's total outstanding balance is shown on the top line of the display.

Payment Categories

An optional select-list of payment categories may be assigned to suit the school or college.

eg

- Weekly
- Monthly
- Quarterly
- Annually

Payment categories are assigned by selecting: **Parents Menu - School Fees Menu - Payment Categories.**

It is important to **keep the same sequence** of categories when the list is amended. ie No. 1 on the list should stay as No. 1, No. 2 should stay as No. 2. If the sequence of the category list is changed, the category assigned to Parents will also change.

Therefore it is best to add new items to the bottom of the list, and not to delete items from the list.

When payment categories are assigned:

One category may be assigned to each Parent. A drop-down list of categories appears at the bottom of the Parent Details screen.

- Parent Lists may be printed for one of the payment categories.
- Parents Fees Statements may be printed for one of the payment categories.
- Parents Aged Trial Balance may be printed for one of the payment categories.

(Note: If no payment categories are assigned, drop-down lists for select Payment Categories do not appear.)

Follow-up of Overdue Fees

The methods for follow-up of overdue fees are:

- On-screen enquiry of Parent's outstanding amount
- Print Parent Statements
- Print standard letters / send emails / send SMS messages
- Print Aged Transaction Report
- Display graphs of outstanding amounts
- [Charging Interest](#) on overdue fees

In all printouts, there is an option to print only for those Parents with an outstanding balance **above** a nominated amount. This helps to isolate the parents who most need following up.

On-screen enquiry of Parent's outstanding amount

All transactions for a parent are displayed on the screen. This display can be accessed from the **Parent Details screen - Financial Details button - F4 Fees Transactions** or from **School Fees Menu - Fees Transaction Lists - Display Fees Transactions**. Transactions are displayed in order of transaction date. The screen shows if transactions have been previously printed on a fees statement - unprinted transactions are shown in dark red. It is helpful when answering an enquiry from a parent to see which transactions they have and have not seen on the latest Statement.

Print Parent's Statement

A Statement for one Parent can be printed from **Parent Details - Financial Details - F8 Print Statement**. A range of Parent Statements may be printed from **Parents Menu - School Fees Menu - Print Statements - Print Fees Statements**.

Print Standard letters / send emails / send SMS messages

Messages may be composed, requesting payment from Parents. One of the fill-in items is the **amount outstanding**. The selection criteria for these communications, like printed reports, includes the option to select parents with an outstanding balance over a nominated amount.

Labels are printed for the same selection criteria as Standard letters.

Print Aged Transaction Report

An aged transaction report can be printed. This prints all transactions by parent, broken up into 'over 90 days', '31-90 days', and 'current', with a total outstanding balance.

A summary aged transaction report may be printed, showing only the totals (in aged columns) for each Parent.

Aged lists may apply BANK CREDIT balances to oldest Debits **or** show them separately. Discount CREDITS are aged with the corresponding Debit.

Review Graphs of outstanding amounts

This is a quick visual way to determine the group of parents where follow-up will be most effective. Graphs are found in **Parents Menu - School Fees Menu - Fees Graphs**. The graphs show:

- graph of outstanding balances - showing where the bulk of outstanding balances lies. Numbers of parents are graphed against ranges of outstanding balances. Only debit balances are included in this graph.
- graph age of outstanding balances - showing totals outstanding in each aged column.

- graph cash flow from debtors - showing the spread of cash flow into the Bank account over the previous 12 months (if the transaction history is available for that period). Only parents' *bankings* are included on the graph, and other credit transactions on parents' accounts are not included.

Increase cash flow.

Here are some tips for getting parents to pay school fees quickly:

- Get Fees Statements out fast – don't let a backlog form, the sooner they're out, the sooner they're paid.
- Think of it as "school money", not theirs – this will give you added confidence and impetus when chasing overdue school fees.
- Ensure that parents understand your payment terms by including clear messages on the Fees Statements.
- Build a relationship with parents – call them regularly, thank them for payments received, follow up to chase outstanding payments.
- Offer incentives for early or cash payment and clearly communicate these to parents – and where possible, seek payment up front.
- Consider charging interest on overdue payments. Make sure parents clearly understand these charges. SchoolWrite has an automatic option to regularly charge Interest on overdue school fees.
- Adopt a methodical and reliable system for follow-up and never let it slide, e.g. SMS messages, reminder fees statements, letters.
- Offer a variety of payment options such as credit card and direct bank payments to increase the speed with which funds reach the school bank account.
- If parents have a payment problem, suggest an initial deposit with ongoing instalments to gradually clear the bill. Ensure that the agreed schedule is adhered to and that an appropriate interest rate is charged.

Period End & Year End

PERIOD END:

Select **Parents Menu - School Fees Menu - Fees End of Period/Year**. The system will delete matched charges and payments, and reset Finance Code period to date totals to zero.

SchoolWrite allows you define to your own **Period**. In accounting terms, a period is usually one calendar month - 12 per year. However SchoolWrite is entirely flexible, and less complicated. Some schools regard one term as a period - 4 per year. With SchoolWrite, you may close off a period whenever you wish. The choice is yours. Periods do not even have to be consistent in length. Period End does not even have to be processed at all!

You may choose to do Fees End of Period at the same frequency with which you prepare Fees Statements, or monthly.

PERIOD END: (WITH GENERAL LEDGER TRANSFER)

There is a difference to the End of Period Processing Menu when the SW Ledger GL Transfer flag is set to **N** (see **Miscellaneous Menu - Control information - Internal Codes**). There is an extra menu option to deal with the transfer of the month's postings to another General Ledger **General Ledger Transfer**.

You may browse through the Period's postings (and optionally delete balancing postings) before sending them to the Ledger transfer file (**F4 Browse Posting Data**). In the browse function, transactions entered in the Current Period are inspected, and optionally marked for deletion by entering a **D** in the first column. This means that if you are not happy with a posting, you may mark it for deletion so that it goes no further. Transactions marked for deletion are not included in the transfer to the General Ledger. Transactions may also have their deletion marking *removed*, which will then re-include them in the transfer.

F5 Create Posting Data

The accumulated postings are placed in a comma-delimited text file called **POSTNOW.TXT** in the SchoolWrite folder. The external General Ledger program, or spreadsheet, needs to be instructed to *import* the posting data from that file. After importing, the **POSTNOW.TXT** file should be deleted. If it is *not* deleted, the system will display the following message *next time* a GL transfer is requested:

WARNING: Postings from the last period have not been deleted. If they HAVE been imported into the GL, please ignore this warning.

DELETING FEES TRANSACTIONS:

Transactions are automatically cleared from parents' statements during the END OF PERIOD process **Parents Menu - School Fees Menu - Fees End of Period/Year**

Only *balancing* transactions are cleared (ie transactions that numerically add up to zero); **and** only transactions that have previously been printed on a parent's statement.

The Fees End of Period option should be selected at the end whenever transactions are to be deleted (eg at the end of each month, or at the end of each Term). After the Statement has been printed, the next Fees End of Period will DELETE *balancing* transactions.

The Fees End of Period process also zeros totals on Finance Codes. Select **Parents Menu - Maintain Finance Codes**. The "Total amount charged for this period to date" is set to zero.

This figure is for reference only. It is not used in any printed reports.

The Fees End of Period process is optional. There is no requirement to delete transactions in this process.

BALANCE FORWARD AMOUNTS CONDENSED:

Parent Fees Statements may be condensed to one balance forward amount. An individual Parent Code may be selected, or ALL parents. A cut-off date is nominated, up to which transactions will be condensed. The only transactions that will be condensed up to that

date are those that *have* already been printed on a Statement, (ie **Printed?** = 'Y').

If the resultant balance of condensed transactions is Nil, transactions are deleted and no Balance Forward transaction is generated. A Balance Forward transaction is only generated If there is a resultant balance from the condensed transactions.

The option to condense transactions is often used for parents who pay by instalments, resulting in a long detailed transaction list that needs to be cleared.

The option may also be used at the end of a school year to clear all transactions. This has the same effect as Fees End of Year (see below).

NOTE: Before a Parent can be deleted from the system, all transactions for that Parent must first be totally deleted. A parent will *not* be deleted if there are *any* transactions present - even if they add up to Nil.

HOW THE TRANSACTION 'PRINTED' FLAG WORKS

When "**Balance Forward**" in the School Profile is set to '**Y**', transactions previously printed on a Statement are added into a single Balance Forward amount. The Balance Forward amount is followed by all new (unprinted) transactions.

Open Item Statements:

When "**Balance Forward**" in the School Profile is set to **N** (no), ALL unprinted transactions print on Fees Statements. All transactions seen on the transaction enquiry screen are printed on Statements - whether the PRINTED flag is Y or N. The PRINTED flag **is** automatically changed to **Y** when Statements are printed, but there is no visible effect on Statements printed.

Note: The PRINTED flag may be reset on individual transactions. In the Transaction Enquiry screen, the **Printed?** column is dark blue in colour, indicating that this column may be edited. (This is the only column that may be changed on this screen.)

YEAR END:

Recommended sequence of actions:

- Take a back-up copy at this point in time and make the necessary entry in your backup log.
- If you wish to charge interest on unpaid accounts, run the CHARGE INTEREST option now.
- Optionally run the option - FEES END OF PERIOD - being the end of the last period of the school YEAR.
- Optionally - select **Parents Menu - School Fees Menu - Fees End of Year**.
The system will delete all parent transactions and where there is still a balance outstanding, replace it with a single 'BALANCE FORWARD' total.

Charging Interest on Overdue Fees

Interest is automatically charge on Parents' overdue fees. See **Parents Menu - School Fees Menu - Charge Interest**

This procedure may be run at any time. It calculates interest accumulated since the last interest charging run, on outstanding amounts for each parent. An interest debit transaction is created.

The process works on an **interest free period - in days** and on an **interest rate (% pa)**. These parameters are set in **Miscellaneous Menu - Control Information - Profile**. The interest free period defaults to **40 days**, and the interest rate defaults to **6%**.


Payments received reduce debit balances, starting from the oldest. A parent is not charged if payment has been received within the interest free period (eg 40 days) of the debt being incurred. However if a debt is still outstanding after day 40, then interest is charged from day 41.

Once interest has been charged on any period, it will not be charged on this period again. ie Each time interest is charged, it is calculated on the period since the last run. Interest is calculated on an effective daily rate.

Note 1: Parents may be set individually to be charged interest, or not. See **Parent Details - Financial Information**.

Note 2: A **minimum interest charge** may be set. When the total interest calculated for a parent is less than this amount, no interest charge is made. The **minimum interest charge** is set on the printout request screen.

There is an option on the printout request screen to print a **detailed interest calculation work sheet**. This can be very long, as it shows each transaction for each parent - with the amount of interest calculated for that transaction. However, along with the Detailed Aged Transaction Report, a fully auditable set of records shows how the interest amount was calculated. This is also helpful in answering queries from parents.

		SchoolWrite Demonstration		08/12/08 11/12/2002	
SchoolWrite		INTEREST CALCULATION WORK SHEET		Interest free period= 40 days	
				PAGE 1	
PARENT CODE	AMOUNT ON WHICH INT IS CHARGED	NUMBER DAYS	DATE CHARGED	INTEREST TOTAL	
KAULR	Mr & Mrs R. Kaul	... Interest on period since 10/06/2006			
KAULR	1,150.00	for 13 days	to 02/08/2006	2.46	
MORRIJ	Mr & Mrs J. Morris	... Interest on period since 10/06/2006			
MORRIJ	1,015.00	for 16 days	to 05/08/2006	2.67	

When a Second Currency is used

The second currency option is used by schools that bill and collect extra fees in (eg) US\$. This is different to the main currency of the country in which the school operates.

The *second currency fees menu* may be turned on or off in:

Miscellaneous Menu - Control Information - F4 Account No's (scroll to the bottom of the list of parameters)

Activate 2nd currency Fees Menu:

Y or N. If **Y** is entered, an extra Fees Sub-Menu will appear under *Parents Menu*

Name of 2nd Currency (eg USD):

3 letter code. The code of up to 3 letters will be used as the heading for 2nd currency Menu options and screens.

When the second currency fees menu is activated, the first option in the menu is **Second Currency Control Information**.

Second Currency Control Information

The second currency fees menu allows billing of school fees, and collection of outstanding amounts, in a currency that is different to that of the main School Fees Menu.

The screenshot shows a software window titled "USD Control Information". Inside, there's a sub-header "2nd CURRENCY - USD". The form contains several input fields and summary boxes. On the left, fields include "SW Ledger GL Transfer (Y/N)" with value "Y", "Exchange Rate for GL Post" with value "0.6942" (with a note "(number of \$ to 1 USD)"), "No. of currency Decimals(0 or 2)" with value "2", "Next Receipt Number" with value "10096", "Number of Receipts printed" with value "1", "USD Bank Account" with value "1234-5678", and "GL Bank Account" with value "6100". On the right, a summary box shows "USD Opening Balance" as "0.00", "USD YTD debits" as "0.00", and "USD YTD credits" as "0.00". At the bottom, there are three buttons: "F6 USD Fees", "F7 USD Discounts", and "PgDn=Save".

Note: the name assigned to the 2nd currency is assumed in this documentation to be **USD** (The name is assigned in *Miscellaneous Menu - Control Information - F4 Account No's.*)

The **second currency control information** controls the processing of Fees billing and Banking in the second currency.

SW Ledger GL Transfer (Y/N):

Second currency fees transactions **may optionally** post to the General Ledger - but only after being converted to the main currency at a nominated Exchange Rate.

Exchange Rate:

This is only used when posting second currency totals to the General Ledger (see above).

No. of currency Decimals (0 or 2):

The second currency may show decimal places differently to the main currency used in the school fees menu. eg when Korean won or Japanese yen are the main currency in the school fees menu, showing **no decimals**, the second currency may be set here to show 2 decimal places (eg US\$)

Next Receipt number:

Receipt numbering for second currency bankings is a separate numbering sequence to the main school fees banking. The next number is set here.

Number of receipts printed:

The option to print receipts when entering banking is given when this number is 1 or more. Duplicate copies of the receipt will be printed when requested here (2, 3, etc).

Second currency Bank Account:

This is the account number to be printed on the Bank Deposit Slip.

GL Bank Account:

This is the General Ledger account number to be used for banking. This is used when **SW Ledger GL Transfer** is **Y**. Postings to this account are first converted to the main currency using the **exchange rate** above. This GL Bank Account may be a different Ledger account number to the one used for the main school banking.

Second currency Opening Balance:

This is opening balance at the start of the financial year. The balance is automatically carried forward from the previous year, or it may be manually reset here.

Second currency YTD debits:

This shows the automatic accumulation of debits from fees billing in the second currency, and from Enter charges.

Second currency YTD credits:

This shows the automatic accumulation of credits from banking in the second currency, and from Enter credit adjustments.

Second Currency Fees Menu

Second currency fees is a *separate ledger* to the main school fees. ie The Fees Statement for 2nd currency fees does not show transactions from the main school fees Statement, and vice versa.

The options in the second currency fees **menu** are the same as for the main school fees menu:

- School Banking
- Enter Charges & Credit Adjustments
- Automatic Fees Billing
- Charge Interest
- Fees Transaction lists
- Print Statements
- Fees end of Period / Year
- Fees Graphs
- Reprint last Audit Trail

Parent Financial Details:

Second currency details can be seen for each Parent in their Financial Details screen.

Financial Information for Parent Code BORKMP

ESC=Quit

Parent subsidy

☐ None

☐ Percentage %

☒ Fixed amount \$

Billed automatically? ☒

Charged interest? ☒

F3 Save

This parent has an outstanding balance of \$600.00

Previous year's contributions to Computer Fund \$0

Current year's contributions to Computer Fund \$240

Number of years since last contribution 0

F4 Fees Transactions F5 Computer Fund F7 Print letter F8 Statement

Second currency transaction details can be seen by clicking on the button **F9 USD Fees** (or keying **F9**).

The Fees Statement that is printed for this parent (**F8 Statement**) is the Statement for second currency fees after viewing second currency fees (F9 option). After viewing main school fees (F4, F5 or F6 options), the Statement printed is for main school fees.

Computer Fund / Building Fund setup

Typical usage of these funds is for small levies, or tax-free gifts which need to be recorded and receipted separately. Moneys into these funds are regarded as *separate* to the payment of parents' school fees.

Donation Fund Name 1:

Donation Fund Name 2:

See **Miscellaneous Menu - Control Information - Account No's**

Donation fund names may be inserted - to suit your school. eg Building Fund, Parents Fund, Library Fund, Sports Fund, etc. A maximum of two special funds may be used. Once a non-blank name has been entered in the Control Information area, that name is used throughout, on all printouts, screens, menus, etc.

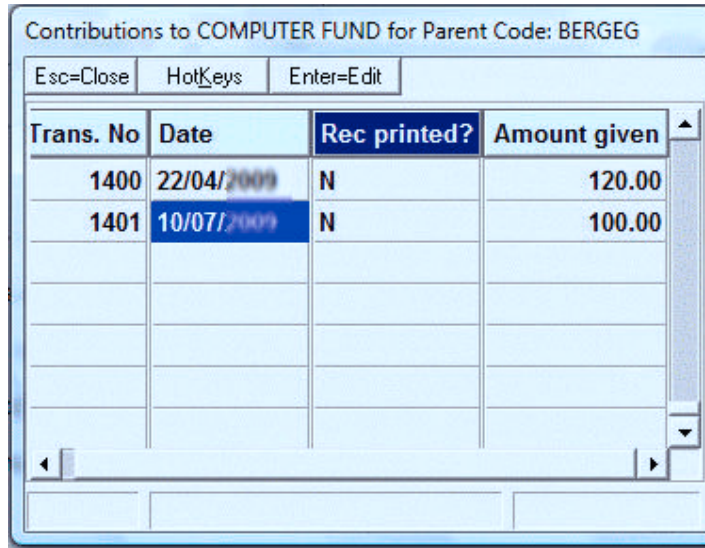
In this documentation, the name **Computer Fund** will be used, although you can name it appropriately to your school.

Donations to these funds are recorded separately to Fees payments, and receipts are issued separately from Fees payments.

Typically, parents remit donations to these funds at the same time as remitting school fees. In order to record this gift, the **School Banking** screen allows Computer Fund gifts to be separated from the school fees payment, even when the payment from the parent comes in one amount. Computer Fund gifts remain for as long as the parent details remain on the system.

Display & List Computer Fund transactions

Display Computer Fund Transactions:



Trans. No	Date	Rec printed?	Amount given
1400	22/04/2009	N	120.00
1401	10/07/2009	N	100.00

All transactions for a parent will be displayed on the screen in order of transaction date. The parent code is first nominated from the pull-down list. The first letter of the Parent code may be typed when the pull-down list is visible - the list will jump to that starting letter.

The screen shows if individual Receipts have been printed for each gift.

The only column which may be edited is the **Rec Printed?** column.


This is the same Transaction display screen that can be accessed from **Parent Details - Financial Info - F5 Computer Fund** and also from the **School Banking screen - F5 Computer Fund Lookup** (Where F5 lookup is available, **F6 Building Fund Lookup** is also available, if the Building Fund name has been set-up).

List Computer Fund Transactions

A list of Computer Fund gifts between two dates is generated for a range of Parent codes. An individual Parent may be listed by requesting the same *from* and *to* Parent codes

A total is shown at the end of the list.

Print Computer Fund Receipts

SchoolWrite Demonstration		
P.O. Box 123, Newtown 2210		
<div>Mrs J. Heazlett 1151 ANZAC PDE MAROUBRA 2555</div>		
Computer Fund RECEIPT NUMBER: 1411 15/01/2007		
AMOUNT RECEIVED: \$		HEAZLJ
		100.00
We acknowledge your donation to the SchoolWrite Demonstration Computer Fund		
For and on behalf of SCHOOLWRITE DEMONSTRATION Computer Fund		

Select **Parents Menu - Computer Fund Menu - Print Computer Fund Receipts**.

This option prints all unprinted receipts for parents. A receipt may also be **reprinted** by entering the request for a single Receipt number. In this case, the receipt will have 'COPY OF RECEIPT' printed on it. Receipts to be reprinted must be requested individually by receipt number.

Receipts are laid out to fit centrally on an A4 page. The page may have the SchoolWrite letterhead generated, or it may have a pre-printed letterhead. The control for whether or not the Receipts are printed on pre-printed letterhead is found in **Miscellaneous Menu - Control Information - F8. Institution (Internal Codes) - Parent Receipts on Letterhead (Y/N)?**

To check the format of the standard SchoolWrite letterhead, select **Miscellaneous Menu - Letterhead Graphics**.

Introduction to Future Enrolments

Future Enrolments are entered for applicants for entry to any school grade, and for any Enrolment year into the future.

It is expected that Enrolment applicants will initially be entered into the system with a 'low grade' status (or **placement code**) - e.g. '*Application to be Sent*', or '*On Waiting List*', etc.

As time progresses, Application Fees (and possibly Enrolment Fees) will be collected, and the details recorded on the Enrolment Applicant's screen. The **placement code** will also be changed - eg to '*Offered a Place*' or '*Not Offered a Place*'. Interviews and exams may be conducted. Results of these events may also be recorded on the applicant's screen.

As much information as possible should be gathered about the applicant, and be recorded on these screens. Data recorded here **'rolls over'** into the Student and Parent modules, if the applicant is '*Offered a Place*'. Since this 'roll over' is automatic, it is more beneficial to gather and store the data during the pre-Enrolment stage, than to search for and enter details at the busy start of school year stage.

Filter Access:

This feature allow temporary restricted access to Enrollment records so that only those for a particular starting year are shown, when navigating to the *next* or *previous* student. The filter may also be further limited by specifying the school year, and a placement code.

Eg. Set filter to Students starting in 2005, in Grade 7, with a Placement code of "On Waiting List". The first student that matches these criteria is displayed. Every **next** or **previous** navigation will result in another student matching the criteria. All other students who do *not* match the criteria are bypassed.

The screen shows the current filter that is operating (if any).

To cancel the filter access, enter **zero** for Starting year, blank for school year, and blank for placement code. The filter is turned off, and access is regained to **all** future Enrolments.

Re-prioritise:

Future Enrolments may be prioritised. The records to be prioritised may be restricted to one starting year, and optionally to one school year.

In the prioritising process, a **priority number** may be set, as well as the **application action date**. Priority governs the order in which print-outs occur. There is an option when requesting a printout to have it in *alphabetical* **or** *priority* sequence.

Priority sequence is

1.priority number (may be zero)

2.application action date

In the prioritising process, only the **application action date** and the **priority number** (and the *placement code*) may be changed. This is indicated on the screen by dark blue column headings.

NOTE: The application action date is initially set to the date on which the Enrolment is **entered**. Schools that give Enrolment priority on a first-come first-served basis are catered for. These schools should leave all **priority numbers** at zero so that *application action date* governs the priority sequence.

Schools that wish to prioritise according to other factors should set the **priority number** for each applicant, from 1 to 999.

Entering new Enrolment applications:

When the first few fields have been entered into a new record, the system checks to see if there are any other Enrolment families with the same (or similar) surname. If a possible match is found, an option comes up on the screen: **Match an enrolling family**. If a match is selected from the list, then the remainder of the family address details, parent code, etc are automatically inserted. By clicking on **Esc**, the system moves on.

Next, checks are made against the surname of families at school. If a possible match is found, an option comes up: **Match existing family at school**. If a match is selected from the list, then the remainder of the family address details, parent code, etc are automatically inserted. By clicking on **Esc**, these details are left blank.

It is then necessary to go through each of the *Tab screens* and edit information into each area.

Future Enrolment Details

Select **Enrolment Menu - Enrolment Details**

SchoolWrite provides for split families where the parents have separated or the student is in the care of a guardian. Extra copies of accounts information, of end-of-term reports, and of Enrolment letters may be sent automatically to the Additional Parent addresses.

Asterisks appearing before the additional address buttons indicate that data has been entered here and is available when the button is clicked.

Fields on Enrolments Screen

Surname	The surname of the child.
Preferred name	The child's first and familiar name (there is provision on another screen to enter the child's FORMAL name).
Placement Code	The Placement Code may <i>only</i> be one of the following: T = Application to be sent S = Application sent (and awaiting return) W = On waiting list (being prioritised, etc.) P = Offered a place (and awaiting reply) A = Offer accepted (ready to 'rolled over') N = Not offered a place D = Deferred (leave for further reactivation) C = Cancelled (to be deleted later)
Enrolment Year	The calendar year in which the child will start school.
In school year	This is the school year in which the child is enrolling.
Enrolment number	This number is automatic. The Next Enrolment Number may be seen, and reset, at Miscellaneous Menu - Control Information - Internal Numbers .

PARENTS TAB

Father	
Name	Given name and surname.
Nationality	
Occupation	
Employer	
Mother	

Name	Given name and surname.
Nationality	
Occupation	
Employer	
Mailing	
Title	Name to appear on envelopes, etc. Mr & Mrs G.
Street	
Town/state	
Country	
Postcode	
Salutation	Name to appear on tops of letters: (Dear) Fred & Betty
Residence / Notes	A separate residential address may be required if the mailing address is a post office box, etc. Alternatively, this is a space for special notes, eg about split families, access orders to children, etc.
Parent code	A parent code of up to 7 characters should be assigned. When entering the Enrolment application, an option was given to match with a parent code in the Parent's module of SchoolWrite. In this case, the Parent Code is already automatically assigned. If necessary, the Parent Code for the Enrolment application may be changed to something different.
	The Parent code must be assigned prior to Rollover to Students and Parents.
Parent subsidy	This may be a discount percentage or a fixed amount. This is rolled over to the SchoolWrite Parent module, and is applied for this particular student in automatic fees billing runs.

APPLICATION TAB

Commence-ment date	Usually this date is left blank, since it is assumed that students will all start at the beginning of Term 1. If the child will start at some later date, it should be entered here. This date will later be held in the Students Module as the student's Future Enrolment date . This date controls whether the student is included or excluded in listings and print-outs which are sensitive to Enrolment starting dates.
Following Year option?	'Y' for students who wish to be registered as potential applicants for the following year, if they should be unsuccessful in being offered a place in the first instance.
In school year	This is only used if the previous answer is 'Y'. This is the specific Year or Grade into which the child is seeking entry in the following Enrolment year.
Comment	30 characters of general comment space
Application action date	This is the date on which the Enrolment application was received back from the parent, and entered into the computer. This date <i>may</i> be used in working out which applicants should be offered a place (prioritising) if offers are made in order of application date. (There is also a priority number which, if used, <i>prioritises ahead</i> of the application date, in determining the order of applications.)
Application acknowledged?	This is an on-screen indicator to show the status of processing the application, eg so that a return letter of acknowledgment may be sent.
Interview required?	This field is to indicate if an interview is still required. eg This may be set to Y when applications are received, and set to N when the interview process is complete.
Interview result	This is a small area in which to record the results of the interview. An abbreviated shorthand system may be used as the space is only 20 characters. A code or a % mark could indicate the recommendation of interviewing officers, or the 'congruity' of the parents to the school's ethos.
Exam required?	This is an indicator to show if an entrance exam is still required.
Exam result	This is a small area in which to record the results of the exam. Marks and assessments results may be recorded here.
Marketing Source	How the student originally came to apply for entrance to the school. eg newspaper (advertisement), parent (attended), Internet (web page), etc. A consistent <i>code</i> should be used in the 10 characters available here.
Application Fee Paid	The standard application fee should be entered here when payment is received from the parent. Application Fees received may be banked through the School Banking system (Parents Menu - School Fees Menu - School Banking - Enter Money Received) Monies should be receipted as ' <i>Sundry payments</i> ' (ie unrelated to Parents' Fee amounts receivable), since Enrolment

Date Paid	application parents are not billed in the same way as current parents. Date of receipt of Application Fee
Enrolment Fee Paid	The standard Enrolment fee (if applicable) should be entered here. This is only used where a second fee is payable (eg a holding amount held in trust during the student's schooling, or a Parents & Friends deposit, etc.). As for the 'Application Fee' above, these monies may be banked through the School Banking system as sundry amounts.

STUDENT TAB

Formal name	The formal name (14 characters) is optional. The preferred name of the child is sufficient.
Sex	Male or Female. Only required to be entered for Co-ed schools
Date of birth	The applicant's date of birth
Nationality	The applicant's nationality
First language	The first language spoken at home. This field records a language group where English is a second language for this student, or a different language is used at home. The language keyed should be consistent with all other entries, so that statistical reporting on this field is also consistent.
Intelligence quotient	This field uses the three digit I.Q. rating.
Home Class	If the students Home Class is known ahead of time, it can be entered here, ready to be rolled over to the Student details.
House	If the students Sports House is known ahead of time, it can be entered here, ready to be rolled over to the Student details.
Optional Activities	If 'Optional Activities' for Students have been defined in the Miscellaneous Menu - Control Information - Profile screen , then they appear here for possible entry at Enrolment stage. If Optional Activities have not been defined for the school, or if they have no relevance at Enrolment stage, they can be disregarded on this screen.
Siblings at school?	This is a Yes or No flag, to indicate if a sibling is currently enrolled at the school.
Position in family	This is a field which indicates the position of the child in the family. eg eldest child = 1, second eldest = 2, etc.
Parent attended school?	This is a Yes/No flag to indicate if one of the Parents is an old boy / old girl of the school.
Discount Type	Scholarship or Bursary. Scholarship or Bursary is required to indicate why the discount is being given. Different Ledger Account numbers are used for each of these two options. The Discount percentage is keyed here. The discount entered here applies only to the Student, and not to other siblings in the family.

REFEREES TAB

Referee details are not rolled over to Students and Parents. The details are for reference purposes only, on this screen, and on the "Enrolment List with Full Details"

There is space for 2 referees:

Name
Address
Phone
Relationship

CHURCH TAB

The details on this tab are the same as for the Student. Details entered here will be rolled over into the Student details.

Church/Religion/Welfare details:

The type of details shown here are determined in the School Profile setup area - see

Miscellaneous Menu - Control Information - Profile

For a Protestant school, the following **Church** details are shown:

- Denomination
- Local church
- Church attending
- Baptism date
- Baptism Church
- Youth group (Y/N)
- Confirmed (Y/N)
- Membership (Y/N)
- Confirmation Date
- Confirmation Church

For a Catholic school, the following **Sacraments** details are shown:

- Religion
- Local parish
- Parish attending
- Baptism date
- Baptism parish
- Reconciliation (Y/N)
- Confirmed (Y/N)
- Eucharist (Y/N)
- Confirmation Date
- Confirmation parish

For a Jewish school, the following **Synagogue** details are shown:

- Faith
- Local Synagogue
- Synagogue attending
- Bar Mitzvah date
- Bar Mitzvah Synagogue
- Youth group (Y/N)
- Bat Mitzvah (Y/N)
- Membership (Y/N)
- Bat Mitzvah Date
- Bat Mitzvah synagogue

For a school with no religious affiliations, **Welfare** details are shown:

- Denomination
- Medicare No.
- Passport No/ID
- Visa expiry date
- Visa No.
- Permanent Resident (Y/N)
- Soc.Sec (Y/N)
- Naturalised (Y/N)
- Soc.Sec Date
- Soc.Sec No.

MEDICAL TAB

The medical details, allergies and immunisations on this tab are the same as for the Student. Details entered here will be rolled over into the Student details.

Allergies & medical notes: Three lines of data may be entered, showing information that

teachers and other carers should be aware of.

Panadol allowed?: This should be entered **Y** or **N**.

Immunisations: The numbers of doses or injections for each major immunisation are recorded here. A printout in the Student Printouts and Reports area will list students whose immunisations are not complete.

Immunisation types and their maximum doses are set in **Miscellaneous Menu - Miscellaneous Files - Immunisation Doses**. Up to 10 immunisation types may be set.

FIRST (& SECOND) ADDITIONAL ADDRESS

If these fields have anything other than spaces, a coloured asterisk will appear on the front screen.

Title	The mailing title for the additional address.
Street	
Town	
Postcode	
Residence / Comments	Home address, or other comments (eg Access rights).
Receives statement of accounts?	"Y" for yes will ensure that a duplicate statement will be printed for the additional addressee.
Receives school report?	"Y" for yes will result in an additional school report being printed for the additional addressee.
Receives mailings and verifications?	"Y" for yes will result in an additional letter being printed for the additional addressee when standard letters are printed, and an additional Parent Verification Report.

Future Enrolment Standard Letters

Standard letters are set-up by selecting:

Enrolments Menu - Enrolments Standard Letters - Maintain Standard Letters

The one letter can then be printed for each Enrolment parent in a selected group, eg Child starting school in 2005, with Placement Code of **P**. The standard letter includes merged data for each Enrolment application at the desired places.

MAINTAIN STANDARD LETTERS

When Maintain standard letters is selected, a name must be assigned to a new letter being created, **or** an existing letter can be retrieved from disk. Enrolment letters should be stored in the SchoolWrite folder.

Once the name of the letter has been established, a window opens for the text of the standard letter to be keyed.

A *Spell Check* button is located at the bottom of the screen, when the Dictionary is available. See [Spell Check Options](#) for further details.

Underneath the window is a list of possible insertion codes which may be included in the letter. All insertion codes begin with the '^' (carat) character, found on the shifted numeral 6 key.

Insertions

^0	Salutation (Dear ...)
^1	Mailing Title
^2	Mailing address 1
^3	Mailing address 2
^4	Mailing address 3
^5	Student preferred name
^6	Student surname
^7	Application action date
^8	Enrolment Year (calendar year)
^9	Start Year / Grade
^10	Commencement date at school
^11	Application Fee
^12	Application Fee payment date
^13	Enrolment Fee
^14	Enrolment Fee payment date
^15	Sport House
^16	Processing date
^.<lc>	Forces lower-case with starting capitals
^.<uc>	Forces upper case

For example:

^16
^1<lc>
^2<lc>
^3<UC>
^4<UC>

Dear ^0,
Your child ^5 starts in Year ^9 at the school on Tuesday 1st February.

PRINTING STANDARD LETTERS & LABELS

Letters & labels to be printed are selected by a number of possible criteria. Only those criteria that are filled in are recognised. Blank criteria are ignored:

- Surname (or part)
- 1st name (or part)
- Enrolment (calendar) year
- Start Year / Grade
- Wait List for future year (Y/N)?
- Wait List for specific Year / Grade
- Application acknowledged (Y/N)?
- Interview required (Y/N)?
- Exam required (Y/N)?
- Placement Code(s)
- Application action date - falling between 2 dates
- Application Fee paid (amount)
- Enrolment Fee paid (amount)

Printout characteristics for Letters:

Left margin: the number of letters or characters to leave on left of page. The default is 5.

Line length: the number of characters in a line. The default is 93.

Font: A drop-down list offers the choice of Arial, Courier New, and Times New Roman. The default is Arial.

Font size: The height of the chosen font, in pixels. The default is 12.

Generate Letterhead graphics: If ticked the SchoolWrite letterhead is generated. If not ticked, space is left at the top of the page (approx 2cm) for pre-printed letterhead.

To check the format of the standard SchoolWrite letterhead, select ***Miscellaneous Menu - Letterhead Graphics***.

Label settings:

The following settings may be adjusted to suit the layout of the blank label stationery being used.

3 Across: the number of labels across the width of the page. The default is 3.

5 Down: The number of labels vertically down the length of the page. The default is 5.

Font size: The height of the chosen font, in pixels. The default is 12.

Left margin: The left margin gap, in millimetres. The default is 0. Allow for the non-printing area of your printer.

Top margin: The top margin gap, in millimetres. The default is 5. Most printers have a non-printing area at the top of a page, and this must be catered for.

Label size, including gap:

These two measurements - height and width in millimetres - are usually shown by the label manufacturer on the packaging of the labels.

Vertical Gap: vertical gap between labels - ie the height

Horizontal Gap: horizontal gap between labels - ie width

Rollover to Students and Parents

The first step is to select **Enrolment Menu - Rollover to Student File - Match Parent Codes**.

Set the CRITERIA for this report to identify those enrolling students who are to be rolled over into the Students and Parents modules. E.g. Offer Accepted ('A') in Placement Code, and '2012' in Enrolment Year.

The second step is to visually check all Enrolments being "rolled over" for accuracy. Read the MATCHING CODE REPORT which will show if any PARENTS at the school have been allocated the same Parent Code as an enrolling student's parent. If the enrolling student is from the same family as an existing student, then the Parent Code **should** be identical.

The Matching Code Report shows:

- any enrolling parent with a blank Parent Code,
- any enrolling parents whose mailing title is incomplete,
- enrolling parent name and address & school parent name and address for matching Parent Codes. If a duplicate Parent Code has assigned to an enrolling parent incorrectly, the home addresses will be different on the report. The Parent code should be changed. Note: the Parent Code for an existing parent CANNOT be changed. The change must be made to the Enrolling Parent code.

Any errors or omissions should be corrected in the Enrolment screens, and the Matching Code Report run again, until either all matching parent codes belong together, or the final message is printed:

** NO ENROLLING PARENT CODE IS USED BY ATTENDING PARENTS **
** NO BLANK PARENT CODES FOUND **

THE ROLL-OVER PROCESS

This process is irreversible. Enrolment applicants who match the desired criteria are "rolled into" the main SchoolWrite STUDENTS and PARENTS area.

All Enrolment applicants successfully rolled over are deleted from the Enrolments area.

A report is printed - 'Roll-Over Enrolments to Students and Parents'. This report indicates for each enrolling student if a new Parent has been added.

It is best to take a **BACKUP** of SchoolWrite (See [Backup](#)) before starting the roll-over process.

Past Student Details

The Past Students Module of SchoolWrite holds details of *all* students who have left the school.

Graduating students' details are transferred automatically from SchoolWrite Students. All students with a graduation date are transferred, whether they graduated from the senior year of school, or left school early.

Another source of Past Students records is DIRECT DATA ENTRY from old records.

Another source of Past Students records is from the Parents of Past Students (P.O.P.S.) See the topic [Deleting Parents](#). Parents of Past Students may be identified under 'Graduation Details', where 'P.O.P.S.' is shown under 'Reason for leaving'. Also the Alumni Year is set to zero. A separate listing of P.O.P.S. may be printed by requesting Alumni Years 0 [zero] to 0 [zero].

The Past Student module allows for quick screen enquiry about a past student. The student's academic record, showing subjects and marks for any desired Term and Year can be called up onto the screen. There is also a screen enquiry for details of POSITIONS HELD by the student (eg prefect, sports teams, etc.).

FIELD DESCRIPTIONS

Surname	This is the student's surname. Originally it is the name whilst at school. This name can be subsequently changed when married, etc. See Single Name field.
First name	This is the student's preferred name whilst at school.
Mailing Title	On transfer from the Student module, this automatically becomes Mr (or Miss) preferred-name surname. This can be changed in future to 'Mr & Mrs..' or to 'Sir ...' etc.
Street	On transfer from the Student module, this is the mailing address of the parents of the student. Details may be subsequently changed on screen.
Town	
Country	
Postcode	
Alumni Year	This is the year (the calendar year) of graduation from the senior year. All students who were in the same class are grouped together with the same Alumni Year. When a student graduates from the senior year, the Alumni Year is the calendar year at time of graduation. If a student leaves school early, eg two years before his or her classmates, the Alumni Year is set to the calendar year of leaving PLUS TWO. When the classmates graduate two years later, their Alumni Year will be the calendar year when THEY leave - which will of course be the same Alumni Year.
Final Year / Grade	This is the student's school year when leaving school.
Sex	Co-educational schools show this detail.
Single Name	(Females only) This is the student's surname whilst at school.
Date of Birth	As shown on the Student record (or amended subsequently here).

Occupation	Initially, this is left blank. It can be changed on-screen subsequently.
Member	This is an optional CATEGORY. Only 'Y' or 'N' may be entered. The title of this category is set in Miscellaneous Menu - Control Information - Profile .
Date of Death	A date may be entered here. A deceased date WILL suppress the printing of letters and labels. Other printouts allow for the inclusion of deceased members to be optionally specified.
Student Number	<p>The Student Number stays with the Past Student, and should never be re-used in the Student module. By means of the student number, the system is able to keep track of the past academic records, and past positions held of the student.</p> <p>When Past Students are being added manually to this screen, a unique student should be allocated, and one which will not conflict with existing students when they graduate.</p>

PHONE & EMAIL DETAILS:

Phone and email details are seen on the Tab page in the middle of the Past Student screen. The Home phone number originally came from the Student / Parent record, when it was transferred to Past Students. Other details will be kept up-to-date as the progress of the Past Student is tracked through tertiary education and beyond.

Quick Send SMS & Email:



Quick-send SMS and/or email to the current Past Student. The email addresses and phone numbers are displayed to enable a selection to be made. A single short message is entered and sent.

See [Quick-Send SMS / email](#)

GRADUATION DETAILS:

Graduation details are seen on the Tab page in the middle of the Past Student screen. The details are transferred from the Student details. The **Transferred to** information is blank when the record is transferred from Students, and can be edited subsequently, as the progress of the Past Student is tracked through tertiary education and beyond.

ACADEMIC RESULTS:

When this button is clicked, the system automatically defaults to the *last term* of the year in which the student left school. The top right corner of the screen shows this Term in highlight colour.

Other Terms and Years can be requested by clicking on the **F8 Change Term/Year** button in the subjects marks screen.

A hard-copy of the End-of-Term Report can be requested by clicking on the **F5 Term Report button**.

STUDENT POSITIONS

These details are available from the Student module, exactly as they were entered during the student's time at school. All positions held whilst at school can be reviewed on the screen.

A list of Student Positions Held may be requested, from a nominated starting date in the life of the student at school.

NOTES

Free form notes about the Past student, including contact details, may be entered here. In the printout of Past Students, the **number of lines of notes** may be specified. Therefore it is wise to regulate the contents of the first few lines, so that desired information will appear in the printout.

Notes details of any length are always available for on-screen reference.

Past Student Photos:

All Past Student photographs are stored in the IMAGES folder directly beneath the SchoolWrite working folder (or directory). This is the same location where Student photographs are stored. In fact, the Past Student photograph is initially the student photo.

Past Student photographs are stored in the IMAGES folder as graphics files with the PAST STUDENT NUMBER as the name of the file. The standard graphic file formats of JPG, BMP, GIF and PNG are all acceptable.

Examples: 92017.BMP 1998217.JPG 903116.GIF 12356.PNG

The picture may be any size, as it is resized to fit the screen when displayed. However if the size is larger than 30K (thirty thousand bytes). the image will not automatically display - the "F4 View Photograph" button must first be clicked (or the F4 button hit). Large photographs take extra time to display, and can slow down the navigation between past students.

A new photo may be loaded from any (permanent) location on the network. This is achieved with the **Reload Picture** button. When a photo is **reloaded** the network address is stored in the "past student picture location file" in the IMAGES folder. This file has the name of the past student number and the extension of .path. Eg 92017.PATH

A .path file, or a graphics file, may be **removed** at any time. First click on the *Reload Picture* button and select **Files of Type** at the bottom of the file dialog screen. The files may be of type .jpg, .bmp, .gif, .png or 'Past Student picture location files'. When the desired file is located in the appropriate folder, right-click on the file-name and select **Delete**. The file will be sent to the recycle bin.

Past Students Printout & Reports

Past Students may be listed by

- Past Students with surnames between Starting and ending Parent surnames AND/OR
- Past Students between starting and ending Alumni years

The group of past students thus selected may be *further* limited by selecting

- Past Students in the Optional Past Student category

The option to include **deceased** Past Students may also be selected.

The number of **lines of notes** to be printed is also specified here. This can be zero.

Past Student Intranet Pages:

Details of Past Students can be seen on the SchoolWrite Intranet. These details may include:

- Alumni year
- date of birth
- graduation date
- final year at school
- mailing address
- phone numbers
- photo

See [Refreshing the Intranet](#) for full details.

Past Student Letters

Standard letters are set-up by selecting:

Past Students Menu - Past Student Standard Letters - Maintain Standard Letters

The one letter can then be printed for each past student in a selected group, eg Alumni year. The standard letter includes merged data for each past student at the desired places.

MAINTAIN STANDARD LETTERS

When Maintain standard letters is selected, a name must be assigned to a new letter being created, **or** an existing letter can be retrieved from disk. Past Student letters should be stored in the SchoolWrite folder.

Once the name of the letter has been established, a window opens for the text of the standard letter to be keyed.

A *Spell Check* button is located at the bottom of the screen, when the Dictionary is available. See [Spell Check Options](#) for further details.

Underneath the window is a list of possible insertion codes which may be included in the letter. All insertion codes begin with the '^' (carat) character, found on the shifted numeral 6 key.

Insertions

^0	Processing date
^1	Salutation (Dear ...)
^2	Mailing Title
^3	Mailing address 1
^4	Mailing address 2
^5	Mailing address 3
^6	Alumni Year
^..<lc>	Forces lower-case with starting capitals
^..<uc>	Forces upper case

For example:

^0
^2<lc>
^3<lc>
^4<UC>
^5<UC>

Dear ^1,
You are invited to a REUNION DINNER for the class of ^6!

PRINTING STANDARD LETTERS & LABELS

Letters & labels to be printed are selected by:

- Past Students with surnames between Starting and ending Parent surnamesAND/OR

- Past Students between starting and ending Alumni years

The group of past students thus selected may be *further* limited by selecting

- Past Students in the Optional Past student Category

The option to include **deceased** Past Students may also be selected.

Printout characteristics for Letters:

Left margin: the number of letters or characters to leave on left of page. The default is 5.

Line length: the number of characters in a line. The default is 93.

Font: A drop-down list offers the choice of Arial, Courier New, and Times New Roman. The default is Arial.

Font size: The height of the chosen font, in pixels. The default is 12.

Generate Letterhead graphics: If ticked the SchoolWrite letterhead is generated. If not ticked, space is left at the top of the page (approx 2cm) for pre-printed letterhead.

To check the format of the standard SchoolWrite letterhead, select **Miscellaneous Menu - Letterhead Graphics**.

Label settings:

The following settings may be adjusted to suit the layout of the blank label stationery being used.

3 Across: the number of labels across the width of the page. The default is 3.

5 Down: The number of labels vertically down the length of the page. The default is 5.

Font size: The height of the chosen font, in pixels. The default is 12.

Left margin: The left margin gap, in millimetres. The default is 0. Allow for the non-printing area of your printer.

Top margin: The top margin gap, in millimetres. The default is 5. Most printers have a non-printing area at the top of a page, and this must be catered for.

Label size, including gap:

These two measurements - height and width in millimetres - are usually shown by the label manufacturer on the packaging of the labels.

Vertical Gap: vertical gap between labels - ie the height

Horizontal Gap: horizontal gap between labels - ie width

Timetable introduction and setup

Administration time is reduced in the school, by making printed timetables available to teachers and students.

At the start of term, timetables may be printed for all students, or for an individual student. This is very helpful to a new student to the school commencing during the term.

Staff timetables can also be printed for ALL teachers, or an individual teacher's timetable may be printed.

Certain information is required for the timetable module to begin to work. This is primarily, the details of each class assigned to a teacher. For entering data, see Timetable Screen

This area of data entry allows for PERIODS to be keyed in against each class, and room numbers as well. This data is sufficient to produce printed timetables for teachers.

The second area of information that is required is SUBJECTS being taken by each student. Once the students' subjects and classes have been established, student timetables may be printed.

Setting up Timetable Structure

Menu option: **Timetable Menu - Setup Timetable Structure.**

Setup Timetable Structure

ESC=Quit

Last period of each day in the school cycle

Last periods

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10
7	14	21	28	35					

Maximum of 10 days per cycle, & 100 total periods (24 in any 1 day)

No. of periods before Recess: 3

No. of periods before Lunch: 5

Title for each Day on Timetable

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10
Day 1	Day 2	Day 3	Day 4	Day 5	-Not Used-	-Not Used-	-Not Used-	-Not Used-	-Not Used-

Print explanations of codes on Timetables

☐ Unallocated subjects ☐ Teachers ☐ Subjects

Free Periods

☐ Print "Free Period" ☐ Print Blank

F3 Set Period Times F4 SAVE F5 Print Blank Timetable

You may define the timetable cycle appropriate to your school. You may change the LAST PERIOD numbers for each day of the school cycle. The maximum number of days in the school cycle is ten (10). If your school has less than 10 days in the cycle, fill in the Last Period number for each day in your cycle, and leave remaining days across the screen blank.

Periods are numbered consecutively, with no breaks, from one (1) on the first day of the cycle to the last period of the last day of the cycle. Eg 35 for a 5 day cycle with 7 periods each day.

Days in your cycle may have variable numbers of periods. It is not necessary to allocate an

equal number of periods to each day. For example, sports afternoons may be omitted from the timetable by setting the Last Period on that day to the number of the last TEACHING period. Timetables are printed with the first period of each day starting at an even line across the page. Days with fewer periods than other days have their final period(s) filled with dashes.

The FIRST period number of each day always follows on consecutively from the last period number of the day before. Lunch and Recess breaks may be defined on the screen, or left blank.

So that you can see the layout of the timetable, there is an immediate print-out option **F5 Print Blank Timetable**. This shows the timetable grid as it will appear in print-outs. The Blank timetable shows the period numbers in the grid. This helps in becoming familiar with the Period Numbers used, when allocating subjects into the timetable. On final timetable print-outs for Students, Teachers, etc., the printing of period numbers is optional.

Title for each Day on Timetable: The names of days may be inserted here. The default is **Day 1, Day 2** etc

Set Period Times: The start and end times of each period may be specified (optional).

Day	Start P1	End P1	Start P2	End P2	Start P3	End P3	Start P4	End P4	Start P5	End P5	Start P6	End
Monday	8.35am		9.10am		9.50am		11.00am		11.40am		1.20pm	
Tuesday	8.20am		9.10am		9.50am		11.00am		11.40am		1.20pm	
Wednesday	8.35am		9.10am		9.50am		11.00am		11.40am		1.20pm	
Thursday	8.35am		9.10am		9.50am		11.00am		11.40am		1.20pm	
Friday	8.35am		9.10am		9.50am		11.00am		11.40am		1.20pm	

Period start times (when entered on this screen) are printed on Timetables. Period end times are optional. There is provision on the Timetable print request screen to specify the printing of Start & End times.

Period start and end times need to be keyed for the first day (Monday). When time is entered for Start P1 on the second day (Tuesday), all other periods for that day automatically copy times from the previous day. Individual period times may be amended as required.

Timetable screen

Timetable printing is based on the screen entry of teacher / class allocations.

Teacher code: **ARB** Mr Alan Beavan
Subject: **CHEM** Chemistry
Year: **11**
Class: **A** Class Size: 7

Periods ARB CHEM 11 A

Period	Room	Day
3	L2	Monday Period 3
13	L2	Tuesday Period 6
27	L2	Thursday Period 6
29	L2	Friday Period 1
32	L2	Friday Period 4

Teachers <PageUp> PREVIOUS NEXT <PageDown>

DEMONSTRATION
Numbers limited to
200 timetable record
Currently: 89

This is the area where each class that is taught in the school is entered into the system. The Teacher's Code (or Initials) is entered first.

ADD To start entering a new Teacher's class, select **Add** and pick the teacher code from the drop-down list. Then pick a subject from the subject drop-down list. And then enter the Year (Grade and Class. (Class may be left blank.)

Once the class has been added, opportunity is now given to enter further details about that class in the bottom half of the screen - namely **period** numbers and **rooms**. This is done by selecting the **Modify Periods** button.

SEARCH To search for a Teacher's class (already keyed in), click on the **Search** button, or type **S**. Type the start of the required teacher's code in the search box, and the first of his/her classes will be displayed. Move up and down the search box with the mouse or with arrow keys. Hit **Enter** or click on the Teacher/Class to select. If that teacher is not in the system yet, the next highest teacher code will be displayed.

CLASSES for two teachers that CLASH:

The system checks the **subject**, **year** and **class** entered to see if the same class has already been allocated to another teacher. In this case, you will see a WARNING message on the screen:

WARNING: Another Teacher is allocated to this Class
This class is allocated to TTT

The Teacher's code of the class already allocated is displayed in the warning message. This represents a definite 'clash' situation. You may wish to change or delete one of the teacher's classes, OR you may wish to allow it (eg team teaching, where two teachers ARE allocated to the same class. Since this is a warning message only, you may accept the situation and proceed simply by hitting the **Yes** (OK) key.

If you do not wish to enter period numbers, and if you do not wish to print out timetables at this point of time, it is sufficient to enter the Teacher code, Subject, Level and Class, in the top half of the screen, leaving Periods information in the bottom half to be filled in later. This will be enough information to have Teacher codes allocated to Students' subject class list. However, the Period information **is** required before timetables can be printed.

Room numbers are 'case dependent'. That is, 'LAB 3' is a different room to 'Lab 3'. Be careful to be consistent in entering room numbers. It is usually preferable to use upper case throughout.

ENTER PERIODS

PERIODS that CLASH for the same TEACHER:

The computer checks the period numbers that you enter, to see if the same period has already been allocated to the same teacher. In this case, you will see a WARNING message at the bottom of the screen:

***WARNING: Teacher is busy this period.
This period is allocated to TTT - SSSS 11 A***

The teacher's code in the warning message will be for the same teacher for whom you are entering period numbers. The warning message also displays the clashing Subject, Year and Class. There is a definite clash of teaching periods here. In most cases, a change is necessary to the data being entered, since the teacher cannot be in two places at once. However, you may accept the situation and proceed by hitting the **Yes** (OK) key.

Automatic update: When you quit the Teacher / Class Allocations screen, the system prompts you to give your permission for the automatic process of Updating Class Sizes to take place immediately. This process may take some little time, since data for the whole school is being processed. Once this process has completed, you may then view on screen the following data, which will have been fully updated::

- Teacher's class sizes (on the Teacher / Class Allocation screen)
- Teacher codes against Student's Subjects on the Student Subject screen, in the Students module.

Print Timetables

Timetables may be printed for

- Current Students (whole years, Home Classes or individual students)
- Teachers (all teachers, or individually)
- Room Usage (all rooms, or for individual rooms)
- School (individual school years at a time)
- Free Teachers by Period
- Free Rooms by Period

SchoolWrite Demonstration SchoolWrite					
TIMETABLE FOR: Cris HEAZLETT (Student No. 29) Year 11 / 4					
Cris HEAZLETT					
	Monday	Tuesday	Wednesday	Thursday	Friday
Period 1	ECON 11 A KLB (103)	ENG 11 A DBR (101)	PHYS 11 A ARB (L1)	GEOG 11 A KCF (102)	CHEM 11 A ARB (L2)
9.10am Period 2	GEOG 11 A KCF (102)	PHYS 11 A ARB (L1)	Free Period	ECON 11 A KLB (103)	GEOG 11 A KCF (102)
9.50am Period 3	CHEM 11 A ARB (L2)	Free Period	MATH 11 A RDP (130)	MATH 11 A RDP (130)	PHYS 11 A ARB (L1)
R E C E S S					
11.00am Period 4	GEOG 11 A KCF (102)	PHYS 11 A ARB (L1)	ENG 11 A DBR (101)	ECON 11 A KLB (103)	CHEM 11 A ARB (L2)
11.40am Period 5	Free Period	GEOG 11 A KCF (102)	ECON 11 A KLB (103)	Free Period	ECON 11 A KLB (103)
L U N C H					
Period 6	ENG 11 A DBR (101)	CHEM 11 A ARB (L2)	Free Period	CHEM 11 A ARB (L2)	MATH 11 A RDP (130)
Period 7	PHYS 11 A ARB (L1)	MATH 11 A RDP (130)	TENN 11 ARB	ENG 11 A DBR (101)	Free Period
Room Numbers appear in brackets(), after Teacher's initials					

When printing Students Timetables:

School Year is optional ... however it is more usual to print one school year, or even one Home Class, at a time.

Enrolled as at

The default for this date is the current processing date. You may enter a different date, future or past. The program will print only students who are enrolled at that date. (eg a student who is commencing later in the term is NOT printed when an earlier 'Enrolled as at' date is used.)

Home Class

You may leave this blank, and ALL CLASSES will be printed. (Note: Home Classes are those shown on the front screen for each student, and do NOT relate to subject classes.)

Surname or Number

You may leave this blank, and ALL STUDENTS will be printed. If however, you wish to print just ONE student, the entry of their Student Number will achieve this. You may also enter their SURNAME, however this will print more than one timetable if there is more than one student with the same surname in the requested Year (and Home Class).

You may use this feature to print timetables for all students a particular string of letters. eg 'cam' will produce timetables for CAM, CAMERON and CAMPBELL

Note: surnames are NOT case dependent. That is, it does not matter whether you type in 'CAM' or 'cam'

OPTIONS ON TIMETABLE PRINT REQUEST SCREEN:

Period Times - Start only / Start & End

Start only:

Period Start Times are always printed. Period start times are entered in [Setup Timetable Structure Screen - F3 Set Period Times](#). Period Start Times may be left blank.

When Period Start Times are identical for each day of the timetable cycle, the start time is printed in the left-hand box with the title **Period 1, Period 2**, etc When Period Start Times vary for any Period in the cycle, they are printed at the top of each timetable box, above the Subject, Class, Teacher & Room details.

Start only option results in a shorter page - ie the timetable boxes are smaller.

Start & End:

Period Start & End Times are printed when this option is selected. Period End times are optionally entered in [Setup Timetable Structure Screen - F3 Set Period Times](#).

When Period Start & End Times are identical for each day of the timetable cycle, the start & end times are printed in the left-hand box with the title **Period 1, Period 2**, etc When Period Start & End Times vary for any Period in the cycle, they are printed at the top of each timetable box, above the Subject, Class, Teacher & Room details.

Start & End option results in a longer page - ie the timetable boxes are larger.

Period Numbers - NO Print/Print

The usual response to this is NO Print, However, when requested, the period number will be printed in a small box in the top left hand corner of each period of the day in the timetable. Period numbers start at 1 (Day 1 Period 1) and continue on up to the highest numbered period in the cycle (eg 'Period 35' being the last period on a Friday in a 5 day school cycle).

Usually Period numbers are only printed when timetables are being established and Teacher/Class Allocations are being entered.

OPTIONS ON TIMETABLE STRUCTURE SCREEN:

The following are turned on/off in the **Setup Timetable Structure** menu option: **Legends at bottom of Timetable:**

- Unallocated Subjects
- Teachers - codes and Names
- Subjects - codes and Names

On the printout of Timetables, "FREE PERIOD" will print when nothing is allocated. The Words "FREE PERIOD" can be suppressed and blanks will be printed by selecting the required option in the **Setup Timetable Structure** menu option:

TIMETABLE-RELATED PRINTOUTS

Print Teacher Clashes:

Print Room Clashes:

These reports list Teachers / Rooms that are allocated more than once to the same period in the current term.

Clashes listed here may be acceptable (eg 2 streams taught in the same classroom). However clashes may indicate an error in Timetable allocations, where corrections will need to be made.

List of Teacher Loads:

This is a shortened form of timetable printout, primarily designed to show the teaching loads of staff.

Eg

Mr Alan Beavan (ARB)

Physics	9 A	Class size:	5	Periods:	2	4	12	22	30
Chemistry	11 A	Class size:	7	Periods:	3	13	27	29	32
Physics	11 A	Class size:	7	Periods:	7	9	11	15	31
Sport	11	Class size:	5	Periods:	19	20	21		
Chemistry	12 A	Class size:	5	Periods:	14	17	24	34	
Pyhsics	12 A	Class size:	5	Periods:	6	8	18	28	

Total teaching load (periods taught): 26

Prepare Next Term's Timetable

Select **Timetable menu - Prepare Next Term's Timetable**

There are 3 main options to help to set up and prepare the timetable for the following term, semester or year. The current term timetable will not be altered, and can be left in place right up until the start of the new term.

The new term's timetable may be setup in conjunction with students' subjects for the new term. Students' subjects may also be setup ahead of time, without disturbing the current term's subjects. See [Students Menu - Student Miscellaneous - Prepare New Term - Prepare Student Subjects](#)

The options for preparing next term's timetable are:

- USE
- COPY
- CLEAR

Teachers/Class Allocations are the classes, the periods in which they are taught, and the rooms where they are taught. There are three sets of Teacher/Class Allocations available - the CURRENT term, NEXT TERM 1, and NEXT TERM 2. This menu allows for any one of these to be in effect.

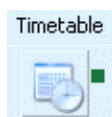
Timetable allocations are "in effect" for the current User Name and Password. ie When this same person logs back into SchoolWrite, the system remembers the Timetable Allocations being used - Current Term, Next Term 1, or Next Term 2.

Any other User Name / Password combination will default to "Current Term" Timetable Allocations.

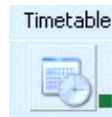
USE:

The USE option 'switches over' to one of the three TERM allocations, eg Next Term 1.

The Term Allocation being used is indicated on the icon bar, next to the Timetable icon. Next Term 1 allocations are indicated by a green bar at the centre right of the icon. Next Term 2 allocations are indicated by a green bar at the bottom right of the icon. Current Term allocations are indicated by *no green bar*.



Next Term 1:



Next Term 2:

All changes to Teacher/Class Allocations will now be made to the nominated set of Allocations, eg Next Term 1. The Teacher/Class Allocation screen shows a large heading **Allocations for Next Term 1**.

All printouts of timetables will be from the NEXT TERM 1 set of allocations. The headings of Timetable printouts will include the words:

"Allocations for NEXT TERM 1"

The current term allocations are not altered.

The time and date of the last access to the NEXT TERM sets of Teacher/Class allocations are shown on the screen. This serves as a helpful reminder of the current status of the NEXT TERM set.

Timetable allocations are switched back to Current Term, only by returning to this screen, and selecting "Use Current term".

Your own labels may be entered for Next Term 1 and Next Term 2, if desired. eg Semester TWO. This will be the name that appears at the tops of Timetable printouts and screens, instead of Next Term 1.

COPY:

This option enables another set of Teacher/Class allocations to be set up. Any existing set of Teacher/Class Allocations may be selected as the base set (Copy FROM). These Allocations may then be copied to any other target set. If the target set (Copy TO) does not exist, it is created. If the target set *does* exist, it is copied over and cannot be retrieved.

The 'base' allocations (Copy FROM) are not altered.

The Copy TO set of Allocations automatically becomes the set now being used. The name of the Copy TO set will appear in large green lettering at the top of this screen, when it is next invoked.

CLEAR:

This option is used to CLEAR one set of Teacher/Class allocations. Either Next Term 1 or Next Term 2 Allocations may be cleared.

Once cleared, a set of Teacher/Class Allocations cannot be recovered.

Upload and Download teacher classes



The relevant student data can be selected and copied to an alternate location on disk, so that the teacher can then enter marks and comments using a different computer, for example at home, a Dropbox location, or away from the SchoolWrite work stations. The data can be copied to a USB drive, or a folder on the school network. Once marks and comments have been entered, the data can then be loaded back into the SchoolWrite database. Note: the disk space required will be about seven to ten megabytes.

The **Line Number** of the subject in the student's subject list must remain unchanged from the time the ReportWrite download is created, to the time of the upload. ReportWrite upload uses the Subject Line Numbers as security to ensure that the correct marks go to the correct subject. [Note: This security feature can be turned off (ie subject Line numbers may be changed) with a file named **RWRITE.\$VL** and the contents of the 1st line '[SECURE=NO]'. The security feature may be turned back on by changing the 1st line to '[SECURE=YES]' or by deleting the file RWRITE.\$VL.]

DOWNLOAD TEACHERS' CLASSES

Download for one Teacher to USB Drive

Select **ReportWrite Menu - Download Teacher's Classes**

This screen allows you to specify what student data is needed, and then to copy it to a specified location (a USB drive, or a network folder).

Prior to downloading Teachers' comments and marks - make sure the Class Sizes are up-to-date. Select **Students Menu - Student Miscellaneous - Update Class Sizes**. This process ensures that students' subjects are updated with teacher codes.

Download data for:

Specify the teacher or non-teaching staff member for whom data is to be copied.

If data is to be copied for non-teaching staff, you can specify the student grouping required. (You may need to review the way in which non-teaching staff have been defined in [End-of-term Report Headings under Miscellaneous Files on the Miscellaneous menu](#).)

When copying student data for non-teaching staff, you have an option as to whether subject teachers' comments and marks are to be included. This makes it possible for example for the school principal to review all subject teachers' comments.

Download location:

Enter the correct location for USB Drive (eg F:\), or for a folder on the network (eg X:\MATHS).

Copy dictionary to disk:

The dictionary file, which is quite large, will be copied to the download location, for spell-checking by ReportWrite. However, it is possible to suppress the copying of the dictionary file, to save space. Change this option to **N**.

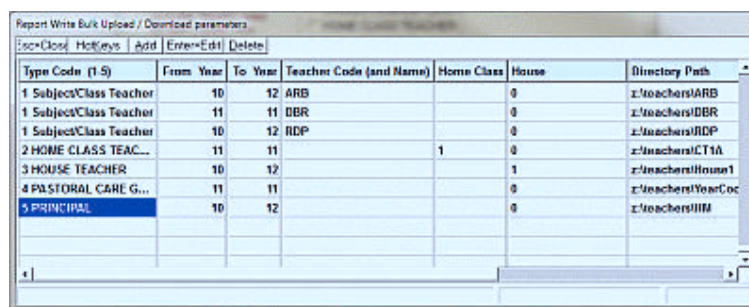
F4 Create Disk:

ReportWrite software and a spell-check dictionary are copied to the download location (USB drive or network folder).

Standard Comments are also downloaded. These are the Standard Comments, set up in SchoolWrite for your school. They may be added to and amended in [*Miscellaneous Menu - Miscellaneous Files - Standard Comments*](#).

Bulk Download for many Teachers to network locations

A bulk Download file is set up for many teachers to be downloaded together - each teacher's download going to a unique network location. This is accessed at the bottom left of the screen: [*F1 Edit Bulk File*](#)



Type Code (1-5)	From Year	To Year	Teacher Code (and Name)	Home Class	House	Directory Path
1 Subject/Class Teacher	10	12	ARB		0	z:\teachers\ARB
1 Subject/Class Teacher	11	11	DBR		0	z:\teachers\DBR
1 Subject/Class Teacher	10	12	BDP		0	z:\teachers\BDP
2 HOME CLASS TEAC...	11	11		1	0	z:\teachers\CT1A
3 HOUSE TEACHER	10	12			1	z:\teachers\House1
4 PASTORAL CARE G...	11	11			0	z:\teachers\YearCoc
5 PRINCIPAL	10	12			0	z:\teachers\JIM

Each column in the Bulk File equates to items on the Download screen. Each line in the Bulk File will generate one download.

Once the Bulk File has been setup, it can be used often without further changes. Bulk download is activated with the button at the bottom left of the screen: [*F2 Bulk Download*](#).

The following ranges are set on the front screen and apply to all Bulk downloads:

- Starting Year
- Ending Year
- Download Dictionary (Y/N)
- Download range of Comment numbers

RUN REPORTWRITE AT DOWNLOAD LOCATION:

There are two different situations:

1. If you have copied to a **USB drive**:

Insert the USB drive in the computer where the entering of marks is to be done.

If the SchoolWrite system *is* available on that computer, you can go to the ReportWrite menu and select Run ReportWrite at Download Location. Enter the location of the USB drive and then click on OK.

If the SchoolWrite system *is not* available on that computer, use Windows Explorer to locate the file **RWRITE3.EXE** on the USB drive, and double click on it.

2. If you have copied to a folder on the school network

If the SchoolWrite system is available on that computer, you can go to the ReportWrite menu and select Run ReportWrite at Download Location. Enter the location where the downloaded files are located, and then click on OK.

If the SchoolWrite system is not available on that computer, use Windows Explorer to find the file **RWRITE3.EXE** at the location where the downloaded files are located, and double click on it.

UPLOAD TEACHERS MARKS AND COMMENTS

Marks and comments that teachers have entered off-line are up loaded here - both for teaching staff, and for non-teaching staff.

Data that has been keyed at the download location - MARKS, GRADINGS and COMMENTS - will override data in the main database. However, blank comments, blank gradings and zero marks DO NOT override.

It is good for a Teacher's marks and comments to be up loaded many times. No damage will be done. Whenever the teacher makes changes to their off-line data and uploads, then the CHANGES will override and become current in the main database.

Bulk Upload

This option will upload all files that are referenced in the Bulk Download File (see [Bulk Download for many Teachers to network locations](#) above. The classes that are uploaded together are defined under the button [F1 Edit Bulk File](#) above.

MARK ENTRY CONTROL REPORT

The Mark Entry Control Report provides a summary report on returned uploads. Percentages are shown, of teachers' marks and comments completed and up loaded back into SchoolWrite.

SPELL-CHECK COMMENTS

Teachers' comments for students' subjects in the SchoolWrite database (for the current term) may be checked for spelling errors. Specify the teacher(s) or non-teaching staff member(s) for whom spell-check is to be performed. If the Teacher's Code is left blank, then all Teachers' comments are checked

Mark Entry Control Report

Select **ReportWrite Menu - Mark Entry Control Report**

A Mark Entry grid is a table of percentages, showing the % complete of marks, gradings and comments for each subject.

This Control Report is most useful in following up staff who have not returned their ReportWrite data for upload. The Mark Entry Control Report shows the following:

- Non-teaching staff comments (eg Principal's Comments) are shown with a blank under **subject code**.
- Percentage completed.
 - eg
 - '96%' indicates that 1 student out of 27 has been absent, and there are no exam marks or comments to be entered for this student.

OR

- '90%' might indicate that 3 students out of 30 have been absent, and there are no exam marks or comments to be entered **or** it might indicate that the teacher has missed entering some marks.

Using ReportWrite on USB Drive/network

USB Drive vs Network:

When teachers' classes are downloaded, a choice is made to download to or to a **USB drive**(eg F:\), or a **network folder** (eg: X:\DOCUMENTS\TEACHER_1\).

The Download sent to a USB Drive or a network location includes all necessary program files. The program name is **RWRITE3.EXE**. This is a Windows-based program. Teachers may access this program in the chosen network location from a different work station on the network, or on the USB drive, or by using a Dropbox folder remotely. ReportWrite will run on any remote computer (using USB Drive or Dropbox) - as long as the computer is running Microsoft Windows.

ReportWrite downloads:

Students downloads to ReportWrite may be:

- for subject class teachers
- for non-subject-class teachers (Home Class Teacher, Principal, etc)

When a ReportWrite download is created for non-subject-class teachers, the option is given to *Include Subject teachers' comments and marks*. These details can be reviewed by selecting "Report for 1 Student". Subject Teachers' comments **may**** be changed (eg spelling corrections), but marks and grades may not be changed.

****** Seniority determines who is permitted to change the comments of others. The Principal may change comments and spelling for all other teachers. The Grade Coordinator may not change the Principal's comments and spelling. The Tutor Group Teacher may not change comments and spelling for the Grade Coordinator or the Principal. The Home Class Teacher may only change comments and spelling for Subject Class Teachers

ReportWrite for non-subject-class teachers

Up to 4 **non-subject-class teachers** are setup in SchoolWrite: eg

- Principal
- Grade Coordinator
- Tutor Group Teacher
- Home Class Teacher

Name	Comment	Year/Class
BERGER Peter	Peter is a keen and co-operative student.	10/1
GERKHIS Wesley	A conscientious worker who has made sound progress.	10/1
SUPIERZ Jim	Jim's work has shown a marked improvement in recent weeks.	10/1
TUCKER Shirly	Shirly is working very well.	10/1
CALVERT Ryan	Ryan's work is marked by enthusiasm and thoroughness.	10/2
CAMERON Sue	Outstanding attitude to all aspects of the subject.	10/2
MORRIS Graham	An excellent student in every respect.	10/2
SANTOSH Sally	A good term's work.	10/2
CAM Melissa	Melissa has made a genuine effort and the results are sound.	10/3
CLARKE Mitchell	Mitchell is a friendly good-humoured cooperative student who has made satisfactory progress.	10/3
TARRANT Judy	I commend Judy on a successful term's work.	10/3
GERKHIS Peter	Peter is a reliable student making sound progress.	10/4
SAUNDERS Kathy	A good student who has worked well throughout the term.	10/4
JOHNSON Marie	Marie is trying hard and progress is improving constantly.	11/1

Enter COMMENTS:

Standard Comments may be automatically inserted into the comments box, by hitting <F2>, and browsing through the standard comments, and selecting one. Standard Comments are set up in SchoolWrite, and may be added to and amended for each school. Standard comments are added to the text in the comments box where the cursor is currently positioned. It is possible to add 2 or 3 standard comments, (different comment numbers), adding on to each other within the comments box.

A *Spell Check* button is located at the bottom of the screen when comments are being entered, when the Dictionary is available. See [Spell Check Options](#) for further details.

PRINT LISTS:

A List is printed for ALL students in the current download. A printed List is previewed first on screen, and may then be printed on hard copy.

REPORT FOR 1 STUDENT:

This report is for the current high-lighted student. All available marks and comments are located in the ReportWrite download for this student, and printed together.

SORT BY:

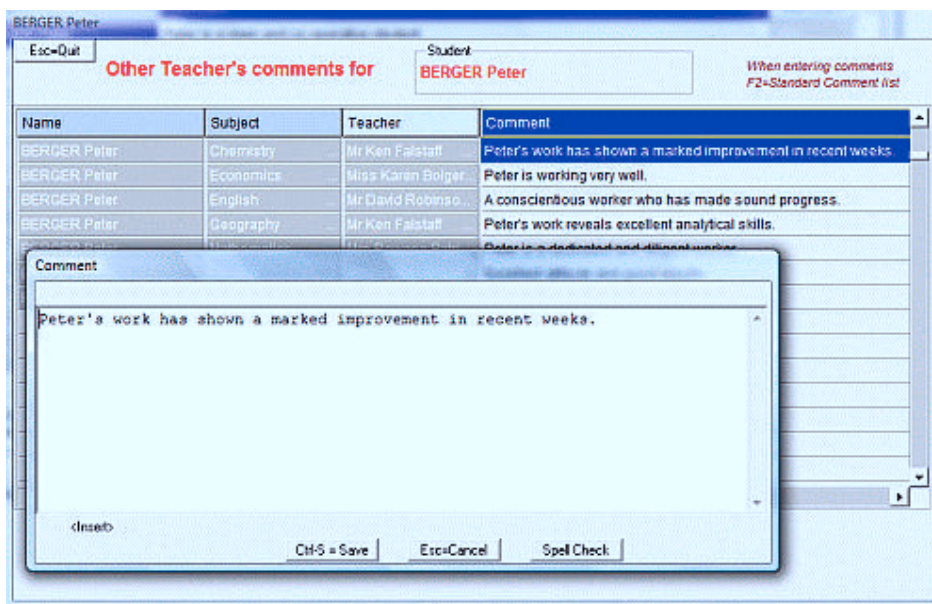
By clicking on CLASS or STUDENT, the sequence of entries on the screen will change. CLASS will produce an alphabetical list of students within each class. STUDENT will group together

all classes for the one student.

OTHER COMMENTS:

Comments entered by other teachers may be reviewed and spelling corrections made, according to the seniority rule:

- when the download has the option to *Include Subject teachers' comments and marks*, the comments for Subject Class teachers are available
- when the non-class-teacher is senior to other non-class teachers (eg Principal is senior to Grade Coordinator), the comments are available for the less senior teachers.



Changes may be made to OtherTeachers' comments, and the Spell Check is also available.

ReportWrite for Subject Teachers

MARKS AND GRADINGS

Classes are presented in school year then in alphabetical order. Within each class, the students are in alphabetical order of surname. Changes may be made to marks and gradings and comments, by positioning the cursor over the required cell, and double-clicking the mouse, or hitting **<enter>**. When a comment cell is selected, a pop-up box appears, where a full comment may be entered or edited.

STANDARD COMMENTS:

Standard Comments may be automatically inserted into the comments box, by hitting **<F2>**, and browsing through the standard comments, and selecting one. Standard Comments are set up in SchoolWrite, and may be added to and amended for each school. Standard comments are added to the text in the comments box where the cursor is currently positioned. It is possible to add 2 or 3 standard comments, (different comment numbers), adding on to each other within the comments box.

A *Spell Check* button is located at the bottom of the screen when comments are being entered, when the Dictionary is available. See [Spell Check Options](#) for further details.

PRINT CLASS LISTS:

A Class List is printed according to where the cursor is currently placed in the list of students. eg CHEM (Chemistry) Class 11 A. To print a different Class List, move the cursor to students in the different class, and click on the F5 button. A printed Class List is previewed first on screen, and may then be printed on hard copy.

PRINT CLASS GRAPH:

A graph is printed according to where the cursor is currently placed in the list of students. eg CHEM (Chemistry) Class 11 A. To print a different Class Graph, move the cursor to students in the different class, and click on the F4 button. Graphs are previewed first on screen, and may then be printed on hard copy. There are two Graph options:

Marks are for each student in the class, sorted from highest exam mark to lowest. The marks to be graphed are first selected from the drop-down list of available marks. A second set of marks may optionally be graphed alongside the first selected marks. Click on **Graph Raw Marks** button to produce the graph.

Average marks for the Class are calculated for the mark that is graphed, and the average marks then show in the column on the far right of the Browse table.

Marks distribution . The marks to be graphed are first selected from the drop-down list of available marks. The graph is produced, showing Standard Deviation, and with a normal distribution curve superimposed. Click on **Marks Distribution** button to produce the graph.

REPORT FOR 1 STUDENT:

This report is for the current high-lighted student. All available marks and comments are located in the ReportWrite download for this student, and printed together.

SORT BY:

By clicking on CLASS or STUDENT, the sequence of entries on the screen will change. CLASS will produce an alphabetical list of students within each class. STUDENT will group together all classes for the one student.

CURSOR JUMP: (after hitting the <Enter> key)

RIGHT - the cursor jumps to the right (the next column of marks) when entering marks and grades.

DOWN - the cursor jumps down the same column of marks

NONE - the cursor stays in location after hitting the <Enter> key.

Spell Check Options

The Dictionary:

The Spell-check option is only available when the correct Dictionary is available in the SchoolWrite folder.

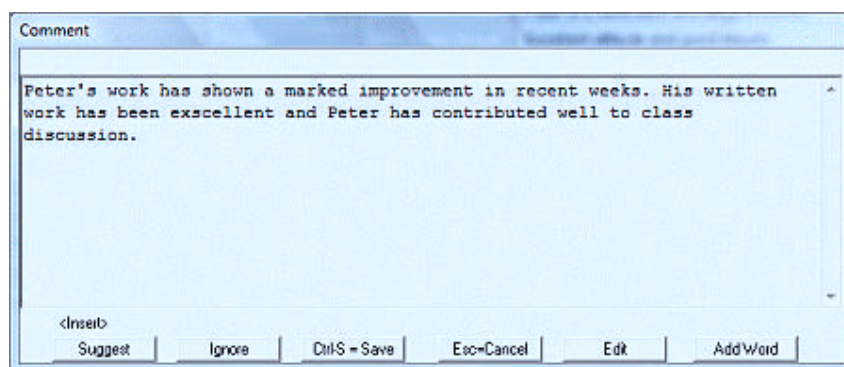
The spell-check dictionary that is used depends on the *date format* being used by SchoolWrite. An American date format will use the Americanized dictionary (**DICTUS3.DIC**) and the English/Australian date format will use the Anglicised dictionary (**DICTEN3.DIC**).

If the appropriate Dictionary is missing from the SchoolWrite folder, it may be down-loaded from www.schoolwrite.com

The Spell-check process:

All Student Comments for a given teacher, school year, or non-teaching designator are checked for spelling.

The spell-check function will continue to the end of the selected group. The fastest way to move through to the end of a selected group without making any changes is by hitting the **Esc** key.



When text fails the spell-checker, the following options are given:

- **Escape**

By hitting the ESC key, the text that is being spell-checked will be exited and left unchanged.

- **Suggest**

A list of possible suggestions is presented. Double-clicking on the correct word in the list of suggestions will replace the misspelled word. A "No suggestions" message is presented if the spell-checker cannot work out any likely suggestions.

- **Ignore**

When the "**Ignore**" button is clicked, the spell-checker leaves the high-lighted word as is, and moves on to spell-check more.

- **Save (Ctrl-W)**

When the "**Save**" button is clicked, the current details are saved, and the spell-check finishes.

■ **Edit**

When the "**Edit**" button is clicked, a window opens with the original word, and allows re-keying of all or part of the word. When the "OK" button is clicked, the edited text replaces the original word.

■ **Add Word**

When the "**Add Word**" button is clicked, the high-lighted word is added to a *local dictionary* of extra words. For instance, the name of a Student may fail the spell-check test, but should be added to the local dictionary so that it passess the spell-check next time.

The *local dictionary* is a list of words saved in the file **EXTRA.DIC** in the current working folder. The file *EXTRA.DIC* may be separately opened in Windows Notepad to edit, add or remove words.

If the "**Esc**" button is clicked after changes have been made, the option is given "**Do you want to save changes** (Yes or No)?"

Introduction to General Ledger

The General Ledger makes accounting easy. The system is **date driven**, which means that dates within the financial year are nominated for any report printout. Reports include only transactions between those dates.

The 2 most commonly used areas of the General Ledger are **Ledger Postings** and **Printouts & Reports**. *Ledger Postings* are generally performed on a daily basis. This includes entry of Cheques, deposits and journals. Enquiries on postings entered shows postings in the chronological order in which they were keyed. All other reports within the General Ledger show details in date-of-transaction order.

Other General Ledger Menu options are:

Printouts & Reports contains all the reporting requests which can be made, including Tailored Financial Reports. Also in this menu are the Trial Balance, the Profit and Loss Statement, the Balance Sheet, and the printout of Finance Code Details (ie printouts of transaction entries by Finance Code number).)

End of Year - A new Ledger is opened for the *next* financial year, with Balance Sheet balances being carried forward. The *old* year remains open for adjustment entries, and for further printing of financial reports. The *old* year may be finalised at any time in the next 12 months - as long as it is prior to the end of the *next* financial year.

The **Prior Year** menu allows for the entry of postings, and for printouts and reports. These options appear the same as for the current year. However **only prior year dates** are allowed in this area. All prior year screen have splashes of yellow - as a reminder that you are in the prior year area - and not in the current financial year area. eg:

A screenshot of a software interface element. It consists of a yellow rectangular label with the text 'Journal number' in black, followed by a light blue rectangular input box with a small icon on its right side.

Maintain Codes This option involves the setting up and the maintaining of the chart of accounts. Provision is made to automatically add accounts to the chart of accounts from the standard set of accounts for Schools.

PASSWORDS

See [*Miscellaneous Menu - Passwords - General Ledger*](#).

There are three areas which can be separately protected by password:

- Enter ledger postings
- Ledger printouts & reports
- End of Year / Maintain Codes

If all three areas are set to **No Access**, the General Ledger will not be visible to users on the top menu.

Enter Cheques, Deposits and Journals

Enter Cheques

Cheque number

Cheque date

Cheque details

This Cheque has the following debit postings:

Finance code	Description	Amount
2490	Computer Expenses	152.60

Total amount of Cheque : 152.60

Cheque will be posted to
6100
Bank Account

Total amount
152.60

Bank Statement
☐ Mark as "presented"

F4 Add

F5 Edit PgDn=Save

F6 Delete Esc=Clear

NUMBER: (Cheque, Deposit or Journal number) The first Cheque, deposit or journal number is entered at the start of a posting session, and from then on the next number is automatically incremented.

DATE The date of the transaction - ie the date of the Cheque, or the date of the deposit, etc. This automatically defaults to the PROCESSING date.

DETAILS This is the general description of the Cheque, deposit or journal. Cheques should include the Payee and some shortened reference to the item being purchased. Cheques and Journals should hold as much detail as possible in the limited space.

Deposits are more usually entered through **Parents - School fees Menu - School Banking - Enter Money Received**. School Banking deposits are automatically posted to the General Ledger, and there is generally *no* need to manually enter Deposits.

Cheque payments are more usually entered through the **Creditors** system. Creditors Cheques are automatically posted to the General Ledger. However, "prompt" Cheques, or Cheques for cash payments are likely to be entered manually here.

BANK Account for Cheques & Deposits: Each Cheque or Deposit consists of a posting to the Bank Account, and at least one other posting to another Finance Code. The Bank Accounts will always default to the standard Bank Finance Code(GL Bank A/c), as defined in **Miscellaneous - Control information - Account Nos**. During entry of the transaction, the Bank Finance Code can be changed by hitting the **Change** button (eg This may be required where two or more bank accounts are operated).

Postings to accounts are entered after hitting the **F4 Add** button. There is *no limit* to the

number of entries allowed to make up the total of the Cheque, deposit or journal. Eg Petty Cash reimbursement Cheques typically cover *many* expense Finance Codes. Individual postings accumulate in the browse area, in a scrolling window in the middle of the screen. The mouse may be used to move up and down through the accumulated postings. Individual lines may be edited (**F5** button) or deleted (**F6** Button). A new posting entry may be commenced by hitting the **F4** button.

Finance Codes are selected from a drop-down list. The list is alphabetical, on the *name* of the account. Type the 1st letter of the required account name when the list is open, and the cursor will 'jump' to that point in the alphabetical list. Use the up and down arrows (or the mouse and slide bar) to locate the specific finance code. Alternatively, the finance code number may be keyed directly, without access to the drop-down list

Bank Statement Mark as "presented". This option may be ticked for a cheque or a deposit if the funds have already been presented at the Bank. This avoids the extra step of locating the item in the Bank Reconciliation Postings Entered and entering the date presented.

After entering the **amount(s)**, ensure that the total balance shown on the screen is the correct total. When all the required transactions have been entered, press **PgDn=Save** Button to store the transactions for posting.

Note for Cheques: Amounts added should be *positive* amounts. Positive amounts showing in the accumulated browse area in the middle of the screen are **debit** amounts.

Note for Deposits: Amounts added should be entered as *positive* amounts. *After* entry, the posted amounts show in the accumulated browse area in the middle of the screen with a minus sign in front. These are **credit** amounts.

Note for Journals: Journal postings must balance to zero. A screen message shows the amount required to balance the journal.

Enquiry on Postings Entered

General Ledger postings are available for inspection, and postings may be deleted. You may mark *balancing* postings for **deletion** if you wish to stop them going further.

PRIOR postings may also be viewed in a range of nominated dates.

When a search is being made for a particular posting, a specific **amount** may be entered, or a part of the description of the desired posting. When either of these details is keyed, the display of transactions narrows to matching transactions.

Deleting transactions:

Transaction postings are marked for **deletion** by entering **D** in the first column. Thus, if you are not happy with a posting, you may mark it for deletion so that it goes no further. Transactions marked for deletion are no longer included in financial reports. Transactions may also have their deletion marking **removed**, which will then re-include them in the system.

A transaction may be deleted by hitting **<enter>** and then keying **D** into the 1st column (and **<enter>** again). A complete transaction should be deleted - not just part of the transaction. ie At least two lines must be deleted at once. The system checks to see that balancing transactions have been deleted. The total of *all* transactions **MUST** be in balance (in accordance with standard double entry bookkeeping procedures). If you fail to delete balancing entries, the screen displays a message, and you are forced to delete more transactions (or to remove deletion markings).

To remove deletion markings, hit **<enter>** and type a space over the **D** (and **<enter>** again).

Transactions that may be reviewed (and optionally deleted) include not only Cheques, Deposits and Journals, but also other automatic transfers into the Ledger (eg from banking Parents school fees).

"Prior Period" may be selected in the transaction request screen. Prior Period transactions may also be inspected at any time, but they may **NOT** be marked for deletion. The only way to change the effect of a Prior Period transaction posting is to enter a reversal posting.

NOTE: In the Enquiry on Postings Entered, transactions are presented in the order in which they were entered.

General Ledger printouts and reports

Print Finance Code Postings

This option allows you the printout of all details of Finance Codes, along with their transactions. This shows what has happened progressively to each of the Finance Codes representing different aspects of your operation.

Selected finance codes may be printed - just specify the starting and ending Finance Codes. You may also select a range of dates for which transactions will be printed.

An auditor's print-out for the financial year is obtained by selecting ALL Finance Codes for the WHOLE of the financial year.

Trial Balance

The Trial Balance lists all Finance Codes, and the balance of transactions for these codes, as at a selected date. The bottom line of this report proves that the Ledger is in balance.

An option is given to print Finance Codes with zero balances as well.

Standard Profit & Loss

A standard Profit & Loss financial report is generated. The report lists all income and all expenditure, ie a breakup of how much money the operation has made or lost in the current financial year. The final surplus or deficit is shown.

A starting and an ending date must be given. These dates are used for the 'Current Period' totals column in the printout .. the limiting of the range of these dates does **not** affect the 'Year to date' totals column.

Standard Balance Sheet

A standard Balance Sheet financial report is produced. The report shows the status of all Assets in the operation, and balances them against the total of all Liabilities, and Capital and Equity. A Balance Date is required to be keyed in.

Print Chart of Accounts list

A full listing of all Finance Codes is printed. The option is given to print the list in Numerical order or Alphabetical order.

Financial reporting

There are two formats in which financial reports may be setup and printed:

- P & L format. When requesting printout of reports in this format, a starting date and an ending date are specified. There are 4 possible print layouts for P & L style reports, selected at time of requesting the printout.
- Balance Sheet format. When requesting printout of reports in this format, an "as at" date (or Balance date) is specified. There is only one format for Balance Sheet style reports.

Financial reports are set up by the system user.

MAINTAIN FINANCIAL REPORTS

This is the gateway to designing your own reports, and printing them just the way you want them!

There is no limit to the number of Report Layouts that you may set up.

The first thing to be identified is the NAME of the Financial Report which you wish to retrieve. A directory list of tailored Financial Reports is given, for you to make a selection. There is also an option to select ***NEW REPORT***

When ***NEW REPORT*** is chosen, a small box opens for the name of the new report to be keyed in. **Avoid** using full stops, commas or other punctuation marks in the name of the new report.

When the identifying name has been established:

- assign the format of the report: either **P** or **B**
- Give the report a 30 character title to print at the top of each page

The heading and the format option may be edited, if required. To continue with the reporting process, hit **PgDn=OK**.

Setting up Financial Reports is really maintaining a list of Line Numbers which are to be followed in order to produce the financial report required. Each Line Number defines the next function to be performed when generating the printed Report. There are 10 possible functions to perform, and these are seen at the bottom of the screen, below the table of line numbers.

FUNCTION CODES

A	List A/cs (level 1)
S	Subtotal (level 1)
T	Total (level 2) *
G	Grand total (level 3) *
M	Master total (level 4) *
U	Unseen accounts
V	Visible accounts
C	Comment *
P	Page *
Z	Zero totals *

** Starting & Ending Finance Codes are not needed for these Functions*

FIELD DESCRIPTIONS

Line Number	Each line has a unique line number. When a Financial Report is printed, it follows through the report line numbers in sequence. Line Numbers should be allocated in tens (10, 20, 30, 40 etc) or hundreds (100, 200, 300 etc), leaving plenty of space for future additions.
Description	This is a description of the function being requested by the Line Number. For many of the functions, the Description is printed on the Financial Report. eg 'Total of Income', or 'Canteen Trading Profit', etc.
Function Codes	The 10 possible Function Codes are described below.
Starting Finance Code & Ending Finance Code	These only apply to A , S , U and V Functions. All Finance Codes within this range are either printed or totalled. The Finance codes may be selected from the drop down list, or finance codes may be keyed in. It is legitimate to key a finance code that does not exist. eg <i>all</i> finance codes are represented by the range 1 to 9999 (even when the first code number is not 1).

FUNCTION CODES

- A** This function causes all individual accounts in the range to be printed. The Description printed alongside each Finance Code comes directly from the Chart of Accounts (Full Description). The range is indicated by Starting Finance Code and Ending Finance Code. The Description in the **A** Function screen is not used. (Level 1 totalling only).
- U** This function *accumulates* subtotals for a range of Finance Codes. The range is indicated by Starting Finance Code and Ending Finance Code. The function does not cause anything to print on the Report. It draws in subtotals for a specified range of Finance Codes, but the subtotal is **Un**printed at this stage. **U** Functions are usually followed by a **V** Function. The Description in the **U** Function line is not used. (Level 1 totalling only).
- V** This Function draws in subtotals for a range of Finance Codes, and **V**isually prints the Level 1 subtotal. The Description in the **V** Function is printed on the report alongside the subtotal. The individual Finance Codes in the range are not printed - just sub-totalled, and the subtotal is printed. (Level 1 subtotalling only).
- S** This function causes the Description to be printed alongside a **S**ubtotal after all Finance Codes in the range have been printed. The range is specified by the Starting Finance Code and Ending Finance Code. The Chart of Accounts description is printed alongside each Finance Code in the range. The Description in the **S** Function is printed alongside the subtotal. (Level 1 subtotalling only).
- T** This causes the Description to be printed alongside the **total** of all previous subtotals since the last **T** Function. ie Level 1 and Level 2 subtotals are totalled here. The Description in the **T** Function is printed alongside the total. (The Starting Finance Code and Ending Finance Code do not apply to this function.) (Level 2 subtotalling).
- G** This function causes the Description to be printed alongside the **G**rand Total of all previous subtotals since the last **G** Function. ie Level 1, Level 2 and Level 3 subtotals are totalled here. The Description in the **G** Function is printed alongside the total. (The Starting Finance Code and Ending Finance Code do not apply to this function.) (Level 3 subtotalling).
- M** This causes the Description to be printed alongside the **M**aster Total of all previous subtotals since the last **M** Function. ie Level 1, Level 2, Level 3 and Level 4 subtotals are totalled here. The Description in the **M** Function is printed alongside the total. (The Starting Finance Code and Ending Finance Code do not apply to this function.) (Level 4 subtotalling).
- C** This Function prints a **C**omment Heading, and causes just the one line to be printed with the Description (ie the Comment Heading). No amount fields are printed on that line. (The Starting Finance Code and Ending Finance Code do not apply to this function.)
- P** This Function causes a **P**age Break in the Report. (The Description, the Starting Finance Code and Ending Finance Code do not apply to this function.)
- Z** This Function **Z**ero's all subtotal levels. The **Z** Function does not cause anything to print on the Financial Report. It usually follows one of the total functions. It is used to commence a new section of the Report. (The Description, the Starting Finance Code and Ending Finance Code do not apply to this function.) (Sublevels 1-4 are all zero'd).

NOTES ON SETTING UP FINANCIAL REPORTS

When setting up Financial Reports, care should be taken to ensure that the **correct ranges** of Finance Codes have been included, and that the same Finance Code has not been included twice.

eg:

Description	Function	From	To
SELLING EXPENSES	S	2000	2199
CAR EXPENSES	S	2400	2599
GENERAL EXPENSES	S	2100	2299

The above set of Report Line Numbers will print a report which includes Finance Codes in the range 2100-2199 *twice*. This is incorrect.

Ensure that a Finance Code is not **excluded**. For example in the above set of Report Line Numbers, any expenses in the range 2300-2399 would be omitted. This may not be what you wish to see in the financial report.

Finance Codes & Chart of Accounts

FINANCE CODES

The total group of Finance Codes is known as The Chart of Accounts.

The chart of accounts is the basis of the System. It consists of the Finance Codes in the General Ledger, constructed in accordance with the needs of your business operation. The System imposes very few limitations on how you set up this chart of accounts. You can keep it simple or make it as complex as you wish.

Before entering or modifying your chart of accounts, please ensure that you have a good idea of how the System produces management reports, and the sort of information you will want to see in these reports. These management reports include Tailored Financial Reports, the Profit and Loss Statement, and the Balance Sheet.

One Finance Code that you need to concern yourself with is the **Retained Earnings Finance Code**. This is specifically required by the System and should be present at all times in your chart of accounts. It is just another Finance Code, but it has a **code type** of 'R'.

The Retained Earnings Finance Code reflects the retained earnings balance at the start of the financial year. During the year, the system will report profit and loss amounts, but these profit and loss amounts are **not** added to the balance of the Retained Earnings Finance Code at this stage. At the Year End processing, the total profit or loss for the year is automatically added to the Retained Earnings Balance.

The Retained Earnings Finance Code is present in the set up Chart of Accounts. You may modify its description and/or the Finance Code number, but the 'R' **Retained Earnings Finance Code** is always needed to be present. Sometimes it is given the description **Accumulated Funds**.

MAINTAIN FINANCE CODES

Maintain Finance Codes

Esc=Close Add Edit Delete << Previous Next >> Search

Finance code number: 230

Full Description: OVAL MAINT FEES

Short Description: OVAL MAINT FEES

Code Type: I INCOME

Balance End of Last Year: 0.00

BUDGET AMOUNTS

Period 1 to 31/01/09	0.00	Period 7 to 31/07/09	0.00
Period 2 to 28/02/09	0.00	Period 8 to 31/08/09	0.00
Period 3 to 31/03/09	0.00	Period 9 to 30/09/09	0.00
Period 4 to 30/04/09	0.00	Period 10 to 31/10/09	0.00
Period 5 to 31/05/09	0.00	Period 11 to 30/11/09	0.00
Period 6 to 30/06/09	0.00	Period 12 to 31/12/09	0.00

F5 Amount to Spread F6 Actuals to Budget Total for year 0.00

Used on all Financial reports

FIELD DESCRIPTIONS

Finance Code Number	This is a four digit number which uniquely identifies the Finance Code. It is usual for Finance Codes with a similar classification to be grouped together in the same number range. Eg Income Codes in the range 1 to 999.
Short Description	This is an abbreviated 15 character description of the Finance Code. This is used in General Ledger Posting Reports as an abbreviated description of the Finance Code. The General Ledger Posting Report is seen in automatic postings from the SchoolWrite Parents module - eg School Banking.
	The field is optional, and if it is left blank, the General Ledger Posting Report will print the first 15 characters of the Full Description. Since this can cut a word in half, it is best for you to insert your own Short Description.
Full Description	The 40 character Description is printed on Tailored Financial Reports, Profit & Loss Reports, and Balance Sheets. eg 'Total of Income', or 'Canteen Trading Profit', etc.
Code Type	There are six possible Finance Code Types. They are:
I : Income	These Finance Codes usually have credit balances, where money has come <i>into</i> the operation, eg from School Fees Received, etc.
E : Expenditure	These Finance Codes usually have debit balances, where money leaves the operation, eg. Salaries and Wages payments to employees, or other payments of bills, etc.
A : Assets	These Finance Codes usually have debit balances, representing the value of things belonging to the operation that have a real value eg. Bank Account, motor vehicles, property, etc.
L : Liabilities	These Finance Codes usually have credit balances, representing the value of operational debts, eg. Accounts payable, mortgage and loans payable, etc.
C : Capital	These Finance Codes usually have credit balances, representing money that is owed to shareholders or owners of the operation, in the form of accumulated profits.
R : Retained Earnings	This represents the balance of accumulated profits or losses. You may wish to have separate Retained Earnings Finance Codes for Previous Years' Profits & Losses and for Current Year's Profits & Losses. The Profit or Loss from your operation is automatically added to the Retained Earnings Finance Code at the end of the financial year - during Year End Processing. There should be at least one Retained Earnings Finance Code in your Chart of Accounts.
Balance End of Last year	This amount is automatically updated in the Year End Process. These amounts are printed in financial repots, in the left-hand prior year column. These amounts may be edited.
Budget Amounts	Budget amounts may be set for the Finance Code, for each budget period. See Budget Periods & Amounts .

Delete: Deleting a Finance Code is NOT normally recommended, however the option is given so that a Finance Code just entered in error may be deleted. The system double checks with you by asking the question:

*Please be sure that this Finance Code is not referenced by any transactions, or included as a system account number
Are you sure want to delete this financial code(Y/N)?*

ADD TO CHART OF ACCOUNTS

A standard Chart of Accounts ideal for schools is included with the Ledger. It is a comprehensive set of accounts for schools.

FINANCE CODES may be added in required sections, as requested in the following screen. Individual Finance Codes are not added if your system already has a Finance Code with the same number.

Set up Chart of Accounts

Esc=Quit

A STANDARD schools Chart of Accounts may be added

☐ CASH Chart of Accounts
 ☒ ACCRUALS Chart of Accounts

Include Finance Codes for

<input checked="" type="checkbox"/> Bookshop	<input type="checkbox"/> Boarders
<input checked="" type="checkbox"/> Canteen	<input type="checkbox"/> After School care
<input checked="" type="checkbox"/> Clothing Pool	<input type="checkbox"/> Hire of Boarding facilities
<input type="checkbox"/> Hire of School facilities	<input type="checkbox"/> Property rental

PgDn=OK

If a Cash Chart of Accounts is selected, then some of the accruals Finance Codes will not be included. If you are unsure which to select, use the Cash Chart of Accounts.

If Accruals Chart of Accounts is selected, then all Finance Codes will be added to your Chart of Accounts. Accruals Finance Codes include such items as Opening and Closing Stock valuations, and Prepayments. These Finance Codes are generally updated with regular journal entries at the beginning and end of each financial year.

Budget Periods & Amounts

SETTING BUDGET PERIODS

Budget periods are set according to financial reporting periods. A Budget Period may be, for example:

- a calendar month (12 dates are entered)
- a quarter (4 dates are entered)
- an academic term or semester (2 or 3 or 4 dates are entered)

The following sample screen shows dates relevant to four semesters.

Period	From	to
Period 1	01/01/2009	31/01/2009
Period 2	01/02/2009	28/02/2009
Period 3	01/03/2009	31/03/2009
Period 4	01/04/2009	30/04/2009
Period 5	01/05/2009	31/05/2009
Period 6	01/06/2009	30/06/2009
Period 7	01/07/2009	31/07/2009
Period 8	01/08/2009	31/08/2009
Period 9	01/09/2009	30/09/2009
Period 10	01/10/2009	31/10/2009
Period 11	01/11/2009	30/11/2009
Period 12	01/12/2009	31/12/2009

The General Ledger automatically sets calendar month ends as the default budget periods, but these may be changed (eg as above).

Whenever Ledger reports in the P & L style format are requested, a **starting date** and an **ending date** are nominated. When the report format includes Budget amounts, the system checks that the ending date of the Report coincides with a Budget Period ending date. If the ending date is **not** a Budget Period ending date, the following message is shown:

This ENDING date is NOT a Budget Period date
... therefore Budget amounts shown will be
pro-rata'd to fit the required period.

SETTING BUDGET AMOUNTS

Budget amounts may be set for each Financial Code. An amount is entered for each Budget Period already established (see above).

A separate area of the Finance Code screen shows Budget Amounts.

Budget amounts may simply be edited on the screen, by electing **Edit**, and moving the cursor to the budget period to be changed.

SPREAD Budget amounts over the year:

Annual Budgets may be **spread**, using the **F5 Amount to spread** button. This is a convenient shortcut to entering each budget period amount manually.

The screenshot shows the 'Maintain Finance Codes' window. The 'Finance code number' is 110, 'Full Description' is 'Fees Billed', 'Short Description' is 'Fees', 'Code Type' is 'INCOME', and 'Balance End of Last Year' is 0.00. Below this is the 'BUDGET AMOUNTS' section with a table of budget periods (1 to 6) and their amounts (all 0.00). A dialog box titled 'Spread Budget Amount over the year' is open, showing 'Amount to be spread' as 0.00, 'Over equal Months or Quarters' as 'M' (Months), and 'Starting at which month' as '0' (month of the quarter: 1, 2, or 3). The dialog box has 'Esc=Quit' and 'PgDn=OK' buttons.

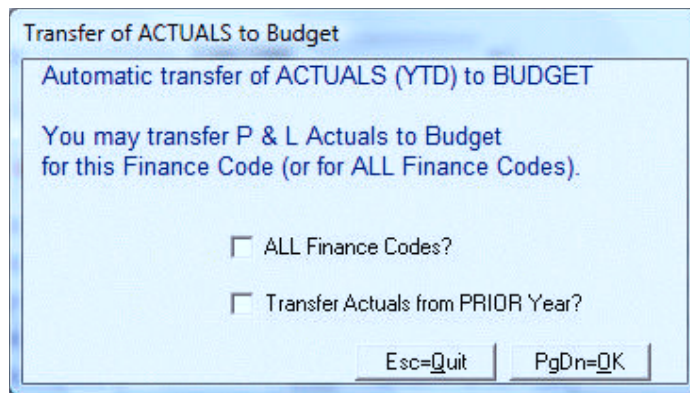
The annual budget amount is entered in "Amount to be spread":

- as a positive amount (debit) for expenditure items
- as a negative amount (credit) for income items.
- If the amount is to be spread over equal **Months**, the full annual amount is automatically divided equally over a twelve-month period.
- If the amount is to be spread over equal **Quarters**, the starting month of the quarter is specified (1, 2 or 3). The amount is automatically spread accordingly over the relevant quarters of a twelve-month period.

TRANSFER ACTUALS to Budget

Annual Budgets may be **set**, using the **F6 Actuals to Budget** button. This is a convenient shortcut to entering each budget period amount manually.

This option provides an automatic transfer of **Actuals (YTD)** to Budget. You may transfer P & L Actuals to Budget for **this** Finance Code, or for ALL Finance Codes.



If **this** Finance Code (only) is selected, the spread of actuals will be immediately displayed in the Budget Periods.

If **All Finance Codes** is ticked, a progress bar shows at the top of the screen, as Finance Codes are processed. Only Income and Expense Accounts (Type = I or E) are processed. When this process is complete, the screen re-displays the first Finance Code, with the transfer of Actuals to Budget.

The Actuals which are transferred to Budget may be from the CURRENT financial year or from the PRIOR Year. **If a PRIOR YEAR is available** (the system detects the presence of a Prior Year ledger), the option is given on the screen to Transfer Actuals from PRIOR Year.

End of Financial Year

The General Ledger provides financial reporting on the basis of requested dates, rather than on fixed periods. There is **no** month-end process required. The only close-off that is necessary is at the end of financial year.

END OF YEAR

After Finalising End of Year, a new Ledger is opened for the start of the next financial year.

Balance Sheet balances are carried forward to the new year. Adjustment entries may still be entered for the old year. When all prior year adjustment entries are complete, the old year should be finally closed off.

End of Year Processing is very quick, and there is no print-out from the process.

The END OF YEAR option should be selected as soon as the calendar date for the year end is reached. Once this process has been run:

- you may still enter adjustment entries and print financial reports for the old year
- you may commence entry of transactions for the new year.
- During the end of year process, the following things happen:
 - The Year's transactions become the Prior Year transactions, and the new year starts with a clear transaction file.
 - All Income & Expenditure Finance Codes have their balances reset to nil.
 - Total Profits or Losses for the Financial Year (indicated by Income and Expenditure Finance Codes) are placed into the Retained Earnings Finance Code as Accumulated Profits.
 - Balance Sheet Balances are brought forward from the Prior Year
 - The Ledger searches for a Retained Earnings Finance Code before it starts the end of year process, and if none is found, the end of year process is discontinued with a message:

Before you finalise the YEAR, you must insert one Retained Earnings Finance Code ... Code Type 'R'.

After **END OF YEAR** processing, the General Ledger Menu shows a further option: **PRIOR YEAR**

PRIOR YEAR:

This is a 'gateway' menu option. When you select **PRIOR YEAR**, you pass through a gateway to the PRIOR END OF YEAR LEDGER.

Screens have splashes of yellow to remind you in which Ledger you are operating. Most of the Menu options are the same, so that the same type of transaction entries and reporting can be done in EITHER Ledger (ie either the Prior End of Year OR the Current Year Ledger).

FINALISE END OF PRIOR YEAR

This function must be performed when final adjustment transactions have been entered for the old year. You have up until the end of the CURRENT YEAR in which to finalise the Prior End of Year Ledger ie almost 12 months.

All Prior End of Year postings (ie those postings entered into the Prior End of Year Ledger since the Current Year was commenced) will be transferred to the CURRENT LEDGER.

Before the PRIOR END OF YEAR LEDGER is closed, the following steps should be taken - within the PRIOR END OF YEAR menu:

- Final transactions for the year should be entered.
- A trial balance should be printed.
- A Profit and Loss Statement should be printed.
- The Balance Sheet should be printed.
- All TAILORED FINANCIAL REPORTS should be printed.
- A full FINANCE CODE POSTINGS list should be produced.
- A separate BACKUP should be taken, and stored in archives for 5 years.

When all of the above have been done, proceed with finalising the Prior End of Year.

The screen asks the following:

Narrative for postings to CURRENT Ledger *Bal.Day Posting*
First day of NEW YEAR, after Balance Date: 01/01/14

The narrative that you agree to on the screen will be inserted against each Prior Year posting that is transferred to the CURRENT YEAR Ledger. NOTE: Only ONE posting per Finance Code is made. ie All Prior End of Year postings are summarised by Finance Code into one brought forward transaction per Finance Code. Where Prior End of Year adjustments are made to Income and Expenditure Finance Codes, this total is brought forward to the Retained Earnings Finance Code in the Current Year Ledger. All Balance Sheet transaction entries made in the Prior End of Year are brought forward directly into their respective Balance Sheet Finance Codes in the Current Year Ledger.

BROWSE & REMOVE POSTINGS

At any time up until End of Year, it is possible to browse through Ledger transactions. It is also possible to delete matching transactions during this browse operation. See ***Ledger Postings - Enquiry on postings entered.***

Transactions may be inspected, ***and optionally marked for deletion.*** Thus if you are not happy with a posting, you may mark it for deletion so that it goes no further. Transactions marked for deletion are no longer included in financial reports. Transactions may also have their deletion marking ***removed***, which will re-include them in the system.

Bank Reconciliation - Bank Postings Presented

General Ledger postings to the Bank Account are located (Step 1), and marked as *presented* (Step 2).

Step 1: Find Postings

Postings are located by any of the following criteria

- date range
- amount
- posting description

Bank Reconciliation - Step 1: Find postings

ESC-Out

Date range - from 27/07/2009 to 27/07/2009 inclusive.

Amount 0.00

Description (or part)

Postings outside this date range will be ignored.

F4 Find

Bank account's finance code
6100
Bank Account
Change

The default ***date range*** is the previous 12 months.

When **amount** is entered, a match is made on all unrepresented matching amounts, both debit and credit.

When **description** is entered, a match is made on all unpresented postings with the entered string of letters anywhere within the posting description.

Bank Reconciliation - Step 2: Mark postings as presented

Esc=Quit

Date posted	Description	Amount	Date presented	Chq / Jnl number
27/07/2009	Wilson Stationery Supplies	\$ -152.60	/ /	1234

F3=Present All PgDn=Save

Postings matching the required criteria are presented in columns, so that the **Date presented** may be entered. The presented date is usually taken from the Bank Statement.

F3=Present All. This option allows all items currently displayed to be given a common *presented date*. Currently displayed items are re-displayed with the new *Presented Date*, and individual dates may be changed as needed before hitting the **PgDn=Save** button. If the **ESC** button is hit, all changes are discarded. This option may be used when using Bank Reconciliation for the first time, or when there is a large number of unrepresented items in the list.

Removing / Changing a Presented Date

If it becomes necessary to remove a *presented date* from a General Ledger posting, or to change a *presented date*, changes cannot be made to a *Presented Date* under the Bank Reconciliation menu, since this area deals with *un-presented* items.

Select **General Ledger - Ledger Postings - Enquiry on Postings Entered**. Locate the required posting (eg by posting date), and scroll the screen to the **right**. The **Date Presented** is shown here in a column, and changes are allowed for postings to the default Bank Account.

Bank Reconciliation Report

This report is printed between two dates. The default date range is the last 12 months.

Print General Ledger Account (Bank) Reconciliation Report

ESC=Quit

Account to reconcile: 6100 Main Bank account is 6100 Cash at Bank

Date range - from: 27/07/2005 to: 27/07/2006 inclusive.

Shadow: ☐ Yes ☒ No

Printer: WBA-OFFICEHP Photosmart 33

F4 Print F5 Preview F6 Change Printer

Provision is made to change the default Bank Account finance code, to reconcile other Bank accounts within the General Ledger.

The Bank Reconciliation Report shows:

- the current General Ledger balance of the Bank account
- unpresented Cheques and charges (if any)
- unpresented deposits (if any)
- final balance (*Current balance on Bank Statement should be*)

Account Reconciliation Details From 13/02/2005 to 13/02/2006			
Date	Details	Cheque/ Jnl No.	Balance
	Balance of Account 1020 - Westpac Cheque Acc		1,118.44 Dr
	Less unpresented cheques & charges		
30/01/2006	Amex	3753278	728.05
03/02/2006	Visa	4853562	1,231.50
03/02/2006	Bank - Service Fee	-2	11.00
	Plus unpresented deposits		
29/01/2006	Macquarie CMT Interest	-1	55.23
03/02/2006	Cash Register sales	-1	544.50
	Current balance on Statement should be		2,489.26 Dr

When there is a variance between the current balance on the Bank Statement and the final balance of this report, the following actions are probably necessary:

- post new entries from the Bank Statement into the General Ledger, that have not yet been posted (eg Bank interest, Bank charges, etc)
- Mark as *Presented* - new items that are now showing on the Bank Statement
- Make corrections to in-correct postings (eg mark a wrong posting as **Deleted** (select **General Ledger - Ledger Postings - Enquiry on Postings Entered**.) and re-enter the posting)

Introduction to Creditors

The Creditors module is an **Accounts Payable** system which prints Cheques, accumulates a history of transactions for each creditor, and which monitors the future Cash Flow of the school.

Invoices

Creditors **invoices** should be entered on a daily basis. As soon as an accounts payable (Creditors) invoice arrives in the office, it should be entered into the system.

Invoices may be split over any number of Finance Codes. When an invoice is received, a decision must be made regarding its due date for payment. The Due date for payment is an important part of the data-entry of the invoice. It is this date which enables a projected cash flow report to be produced.

As soon as a Creditors invoice is entered, the expense is shown in the General Ledger - eg on the Income and Expense Report. Even though the **payment** for the invoice may be held until an appropriate **due date**, the expense is shown immediately.

Payment by selection

Invoices are **selected** for payment, usually on the basis of the due date for payment. Invoices may also be **selected** individually, or by creditor code - eg all unpaid invoices for a nominated creditor.

Once **selected**, invoices are then automatically grouped by Creditor and a single Cheque payment is made for each creditor. A remittance advice giving full details of the payment is printed to accompany the Cheque.

Quick payment may be made for just one creditor. There is a **quick payment** option on the Creditors enquiry screen.

Which payments should be made by the Creditors system?

All account invoices should be put through the Creditors system. ie all invoices which are to be paid at a later date.

Prompt (or immediate) invoices may also be paid easily though the **quick** (prompt) payment option.

One of the advantages of paying Cheques through the Creditors system is the accumulation of the **history** of payments. A quick view of payments to a particular supplier may be made, either on screen or on hard copy. The history of payments may be of any length, and will span financial years.

Which payments are NOT be made by the Creditors system?

Cash payments and salary Cheques are usually **not** made through the Creditors system.

The Payroll is the place to view accumulations of payments to employees.

Petty Cash reimbursement Cheques, are usually entered directly into the General Ledger, and **not** into the Creditors system. Petty cash reimbursements might cover a number of Finance Codes, and the tracking of these expenses is best done in the General Ledger. A history of cash Cheques would **not** be a helpful management tool in the same way that a history of payments to one particular supplier would be. eg supplier of Art materials.

PASSWORDS

See ***Miscellaneous Menu - Passwords - Creditors.***

There are three areas which can be separately protected by password:

- Enter Creditors and invoices
- Pay Creditors
- Maintain Creditor functions

If all three areas are set to No Access, the Creditors system will not be visible to users on the top menu.

Creditor Details

Creditor Details SchoolWrite Demonstration

Esc=Close Add Edit Delete << < > >> Search

Creditor code: **TELECOM**

Name: **Telecom Communications**

Address 1: **P.O. Box 1234**

Address 2: **Capital City**

Address 3: **Australia**

Phone Number: **3 9456 1234**

Fax number: **3 9543 3234**

Last Payment date: **22/07/2009**

Last Payment amount: **250.00**

DEMONSTRATION
Numbers limited to
3 Creditor records.
Currently: 2

Contact: _____

Comment: _____

Their A/c number: **4153-5401**

Invoices: **TELECOM** **Telecom Communications**

Key: Unpaid Paid Held

Select invoices for quick payment
Browse Pay

Inv Date	Amount	Selected	Held	Paid	Due date	Detail
30/06/2009	225.30			Y	20/07/2009	Invoice 3026/401 Fax calls
21/07/2009	415.60	Y			13/08/2009	Invoice 4013/401 Phone calls

Creditors <PageUp> PREVIOUS NEXT <PageDown>

CREDITOR FIELD DESCRIPTIONS

Creditor Code This is the unique code which is used to identify this Creditor. The code is 12 characters long. It is designed to be a 'significant' code, which adequately identifies the Creditor. Often, the business name or surname of the Creditor is used as the code, with initials added to the beginning or end of the code to make it unique.

Creditor Name The full name of the Creditor is up to 30 characters long. This is the name to be printed on Cheques, and on Remittance advices.

Address Line 1, 2 and 3 30 characters is allowed for each of the address lines. Postcode is included within the last address line.

Contact The name of the contact person, or sales representative, in the Creditor's company.

Comment Any brief comment, note, or reminder may be included here.

Phone Number Up to 12 characters are used for the phone number.

Fax Number Up to 12 characters are used for the fax number.

Their Account Number This is the account number by which **this** organisation is known to the Creditor company. i.e. it is their Debtors code for **this** organisation.

Last Payment amount This amount is automatically updated each time **selected** invoices are paid.

Last Payment date This date is automatically updated each time **selected** invoices are paid.

INVOICES (bottom half of screen):

This is a quick view of **all** invoices for this Creditor, appearing in date order You may browse up and

down, left and right, using the mouse and the slide bars. Other columns, initially hidden, may be viewed by moving the slide-bar to the right. These columns are **Cheque No**, **Part Payment**, and **Held**.

Invoice lines are shaded to represent: **white** - invoice unpaid, **pink** - invoice paid, **yellow** - invoice held

Changes may be made to **unpaid** invoices, via the **Browse** button. No changes may be made to paid invoices.

Enter Invoices

Enter Invoices

Creditor code **WILSONSS** Invoice number **W854/19**

Invoice date **27/07/2019** Due date for payment **11/08/2019**

Invoice details **Registrars Office-envelopes**

This invoice has the following debit postings:

Finance code	Description	Amount
2410	Printing and Stat...	543.20
6260	GST on Purchases	54.32

Total amount of Invoice : 597.52

Invoice will be posted to
8200
Sundry Creditor
[Change](#)

Total amount
597.52

F4 Add [Add a posting](#)

F5 Edit [Edit selected posting](#) PgDn=Save [Save this Invoice](#)

F6 Delete [Delete selected posting](#) Esc=Clear [Clear this Invoice](#)

CREDITOR CODE The Creditor code is found from the drop down list, or it may be keyed in full. When the drop down list is open, the cursor jumps to the starting letter when that letter is keyed. A valid Creditor code **must** be entered. The entry of new Creditors should be made prior to commencing an Invoice Entry session.

INVOICE NUMBER This is the number as shown on the Creditors invoice.

INVOICE DATE This is the date as shown on the Creditors invoice.

DUE DATE FOR PAYMENT When an invoice is received, a decision must be made regarding its due date for payment. This is an important part of the data-entry of the invoice. It is *this date* which enables a projected cash flow report to be produced.

INVOICE DETAILS A brief description of the invoice, or a description of the goods or services provided, is entered here.

SUNDRY CREDITORS Account for Creditors invoices: Each invoice gives rise to a posting to the Sundry Creditors Account, and at least one other posting to another Finance Code. The Sundry Creditors Account defaults to the standard GL Creditors Account, as defined in **Miscellaneous - Control information - A/c Nos**. During entry of the transaction, the Sundry Creditors Finance Code can be changed by hitting the **Change** button (eg This may be required where two or more Sundry Creditors accounts are operated).

Postings to accounts are entered after hitting the **F4 Add** button. There is *no limit* to the number of entries allowed to make up the total of the invoice. Eg Teaching materials purchased may be spread between expense Finance Codes for various school departments.

Individual postings accumulate in the browse area, in a scrolling window in the middle of the screen. The mouse may be used to move up and down through the accumulated postings. Individual lines may be edited (**F5** button) or deleted (**F6** Button). A new posting entry may be commenced by hitting the **F4** button.

Finance Codes are selected from a drop-down list. The list is alphabetical, on the *name* of the account. Type the 1st letter of the required account name when the list is open, and the cursor will 'jump' to that point in the alphabetical list. Use the up and down arrows (or the mouse and slide bar) to locate the specific finance code. Alternatively, the finance code number may be keyed directly, without access to the drop-down list

Invoice total:


After entering the **amount(s)**, ensure that the total balance shown on the screen reflects the total of the invoice. When all the required transactions have been entered, press **PgDn=Save** Button to store the transactions for posting.


Entering \$.cc amounts:

The amount for this transaction can be either positive (a debit) or negative (a credit). The amount can be entered as a whole number (ie. whole dollars, no cents), or with one or two decimals for cents. A plus sign is assumed and not needed, and a minus sign when needed should be placed before the number. Usually, when entering a Creditor's invoice, **no sign** is used (ie positive) - unless a Credit Note or reversal is being entered, in which case a negative sign is entered.

Automatic printouts:

After completing a session of entering Creditors' invoices, an Audit trail is printed, and a General Ledger Posting Report.

		SchoolWrite Demonstration SchoolWrite CREDITORS AUDIT TRAIL			21/04/08 12/05/2002
					PAGE 1
CREDITORS CODE	DATE	FINANCE CODE	AMOUNT	INVOICE DETAILS	
WILSONSS	Wilson School Supplies				
	12/03/2006	2410	Printg & Ststy	543.20	Dr
	12/03/2006	6260	GST on Purchase	54.32	Dr
	12/03/2006	8200	Sundry Creditor	597.52	Cr
			0.00	Dr	

		SchoolWrite Demonstration SchoolWrite GENERAL LEDGER POSTING REPORT		21/04/08 12/05/2002	
				PAGE 1	
CREDITORS INVOICE POSTING					
GL Code	2410	Printg & Ststy	543.20	Dr	
GL Code	6260	GST on Purchase	54.32	Dr	
GL Code	8200	Sundry Creditor	597.52	Cr	

Paying invoices

Invoices are paid automatically, if they have first been **selected** for payment.

Selecting and Deselecting invoices for Payment

The aim is to carefully **select** invoices, so that the payment process runs automatically.

The principle of the Creditors system is based on the assumption that all Creditors invoices will be entered into the computer as soon as they are received. At some later stage, invoices will be **selected** for payment.

Invoices may also be **deselected**, so that they are *not* included in the group for payment. Click on **De-Select Invoice** in the top line of the screen, and then tick **De-select all** part way down the screen on the left hand side. This process automatically de-selects all invoices when the **F4 Select** button is clicked.

A typical method of **selecting** invoices, is by their **Due Date for payment**. ie All invoices up to and including a specified Due Date may be **selected**. If the Due Dates are allocated correctly, and there is no dispute regarding the payment of any of these invoices, all **selected** invoices may then be paid automatically.

Alternatively, invoices may be **selected** by Creditor Code.

When selection choices are made in the following screen, the **F4 Select** button is clicked to automatically select invoices as specified.

INDIVIDUAL SELECTION (DE-SELECTION) OF INVOICES

A single invoice may be marked as **selected** (or **de-selected**) by bringing the relevant Creditor Details to the screen.

Click and click on the "**Select invoices for quick payment - BROWSE**" button

Select invoices for quick payment

All unpaid invoices for this Creditor are displayed. The columns with a dark blue heading may be modified. The **selected** status for the relevant invoice may be changed as required.

Unpaid Invoices for WILSONSS Wilson School Supplies

Esc=Close HotKeys Add Enter=Edit Delete

Invoice Date	Amount	Selected	Held	Due date	Detail
01/07/2009	215.00	N	Y	13/07/2009	Invoice 50814 Stationery supplies
22/07/2009	820.00	Y	N	13/08/2009	Invoice 51432 Work books - blank
24/07/2009	105.00	N	N	27/08/2009	Invoice 51496 Ballpoint pens
27/07/2009	597.52	N	N	11/08/2009	WB54/19/Registrars Office-enve

STEPS TO AUTOMATICALLY PAYING INVOICES:

- 1. De-select all invoices (via Menu option "Select invoices for payment") This ensures that the next selection process starts with a clean slate.
- 2. Select invoices for payment - possibly select by due date
- 3. Browse selected invoices - check that the list of all invoices is OK for the next automatic payment step. A further check of invoices to be paid may be made by reviewing the printout **Cash Required for Selected Invoices** (see *Creditors - Printouts and Reports* drop-down menu)
- 4. Pay selected invoices - automatic payment of selected invoices (one Cheque per Creditor).

There are **two sets of printouts** involved in the paying of invoices:

1. Remittance Advice (and optional Cheque form) for each Creditor being paid
2. Creditors Cheque Summary and General Ledger Posting Report

If pre-printed **Cheque** forms are used, these printouts may be directed to different printers. There is a pause between each set of printouts.

1st Printout:

ESC=Quit

Starting Cheque number

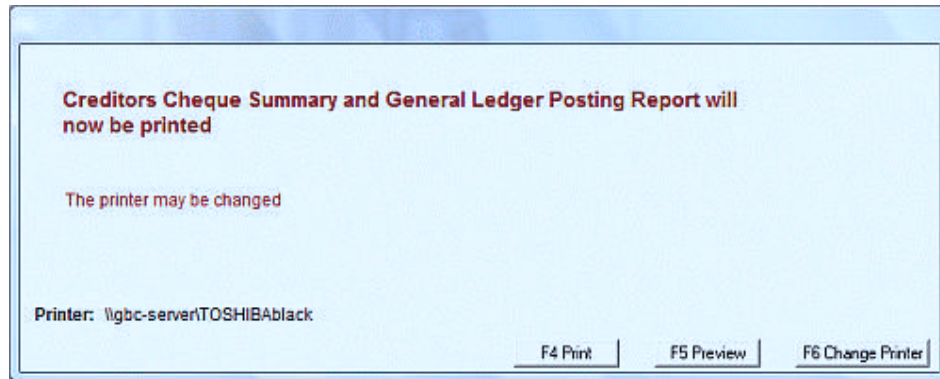
Remittance Advice
☒ Print letterhead

All unpaid Creditors invoices that have been **SELECTED** will now be paid. Load required stationery in the printer now.

Printer: \\gbc-server\TOSHIBAbblack Enter starting Cheque number

If pre-printed Cheque forms are being used, this is where the **starting Cheque number** is entered, to coincide with the first Cheque form in the printer.

2nd Printout:

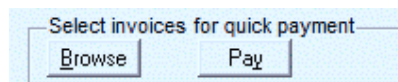


The printouts from this section are for accounting and audit records. The Creditors Cheque Summary and the General Ledger Posting Report will be on plain paper. They may be directed to a different printer, or the same printer may be used, with a change of stationery if needed.

PART PAYMENT OF INVOICES

An invoice that has been entered for its full amount may be ***part paid***.

The steps to **part payment** of invoices are:



1. View the relevant Creditors details on screen, and click on the "***Select invoices for quick payment - BROWSE***" button
2. Unpaid invoices for this Creditor are displayed, with the optional ***Part Payment*** column on the right hand side.
3. Change the ***Part Payment*** column for the relevant invoice to the amount you wish to pay. This amount should be less than the full amount of the invoice.
4. Change the ***Selected*** column to **Y**.

This part-invoice is now ready to be included in the next automatic payment of invoices. When all other invoices have been ***selected*** (and possibly marked for ***part payment***), choose the Creditors Menu option **Pay Selected Invoices**.

The part-payment of an invoice results in **two** invoice lines being generated for the Creditor. Each line has the same invoice detail, number and date:

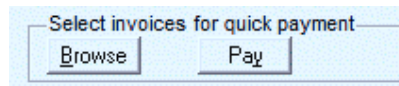
- a) **Paid:** the invoice part-payment, with the invoiced amount being the same as the part payment
- b) **Still to be paid:** the remaining invoice amount to be paid.

The *remaining* invoice amount may itself be part-paid, or it may be paid in full.

Hold & un-hold invoices

Any unpaid invoice may be **held** from payment. When an invoice is **held**, it will **not** be included in any automatic payment. The invoice must be **un-held** before it can be paid.

Invoices may be **individually** marked as **HELD** whilst viewing Creditors details. Click on the button **Browse (selected invoices for quick payment)** in the middle of the screen.



All *unpaid* invoices for this creditors will be displayed. Move the slide-bar to the far right, to display other columns for the unpaid invoices. The last column is **HELD**. This is usually blank, or **N**. Hit **<enter>** on this column (or double-click) and key in **Y** for **yes** to **Hold** the invoice from payment.

To **un-hold** an invoice, change the **HELD** column from **Y** to **N**. Then **select** the invoice for payment, in the normal way.

This is a suitable way to hold back disputed invoiced from payment, whilst still showing the invoice total in General Ledger expense accounts.

If an invoice is to be **held** from payment, and it is **not** to be shown in General Ledger expense accounts, then the invoice should not be entered into the Creditors system.

Cheque and Remittance Layout

The Creditors system allows for a Cheque and Remittance to be printed - to match your specifications. No programming is required, and special stationery need not be printed.

You may print Remittances only, and manually write Cheques from the Cheque book. Cheques are usually only printed by the software when the Bank supplies pre-printed Cheque forms, suitable for a computer printer. You may elect to print **no** Cheques and **no** remittances.

Cheque and Remittance forms are always printed in pairs - i.e. Cheque/Remittance, OR Remittance/Cheque.

Remittances may be printed onto plain stationery, with the letterhead being printed at the top.

The Remittance and Cheque Layout is set-up once only, using the menu option "Remittance/Cheque Layout".

Line No.	Col. No.	Content
10	10	** CHEQUE PAYEE ADDRESS - LINE 1
11	10	** CHEQUE PAYEE ADDRESS - LINE 2
12	10	** CHEQUE PAYEE ADDRESS - LINE 3
13	60	** CHEQUE DATE
14	40	Your ref:
14	50	** CHEQUE PAYEE THEIR ACCOUNT NUMBER
16	1	-----
17	1	REMITTANCE DETAILS
18	1	-----
21	10	** REMITTANCE DETAIL LINE
52	60	** CHEQUE DATE
54	1	** CHEQUE PAYEE NAME
56	1	** CHEQUE AMOUNT IN WORDS - LINE 1
56	66	** CHEQUE AMOUNT
57	1	** CHEQUE AMOUNT IN WORDS - LINE 2

The above screen enables a browse through standard layout options.

Layout lines that begin with '**' (double asterisk) are standard lines that have the effect of printing the required data on each Cheque or remittance form. These layout lines cannot be removed, but their printing can be suppressed, by entering 0 (zero) in the **Line No.**

Layout lines that do NOT begin with a double asterisk are user entry lines, that may be added or removed as you wish. A new Line No. is added as a blank to end of the list, allowing for data to be specified. A user-entry line may be removed completely by changing the Line No to zero, and exiting the screen.

The Lines in this browse are automatically **sorted** into Line No. order - when the screen is exited. The next time the screen is displayed, the lines will be in strict sequence.

Purge Old Creditors Invoice

This is a housekeeping function, which simply removes all invoices prior to a certain date. It is recommended that Creditors' invoices be kept for several years, in order to have a suitable history on hand to enable purchasing decisions to be made.

If Creditors' invoices are kept for a long period of time, the file size will grow, processing time may slow. You must decide on an optimum time period to keep Creditors' invoices before purging.

It is recommended that the system be BACKED UP and/or Archived (see this documentation [Students - End of School Year - Create Archive copy of SchoolWrite](#)) prior to running this process. History Backups should be stored separately from regular backups, and kept for some years. In the event of an unusual enquiry or litigation, the history backup can be restored temporarily, in order to review prior transactions.

Change Term/Year & Processing Date

CHANGE TERM & YEAR

Select Miscellaneous Menu - Change Term & Year

The CURRENT TERM and CURRENT YEAR may be changed for as long as you are working in this session of SchoolWrite. At the beginning of each session, the system defaults to the term that is consistent with the PROCESSING DATE (ie the date shown at the top right of the screen). The Processing date is checked against the starting dates of terms as specified in the CONTROL INFORMATION screens (Miscellaneous Menu - Control Information - Profile)

This option allows the default term and year to be overridden. This is particularly relevant when viewing a student's subjects and marks for a desired term, other than the default term.

Note: Term and Year may also be changed when viewing Students Marks. There is a button "F8 Change Term & Year" which has the same function as the option in the Miscellaneous Menu.

CHANGE PROCESSING DATE

Select Miscellaneous Menu - Change Processing Date

The Processing date is automatically assigned to transactions entered. It defaults to today's date. The Processing date can be temporarily changed, for easy entry of transactions for a nominated date. Select ***Miscellaneous Menu - Change Processing Date***.

Typically, the Processing Date might be changed when doing a Fees Billing run, or printing Parent Fees Statements. The Processing Date will become the date of the Parent Fees transactions; or it will be the date printed at the tops of Fee Statements.

Miscellaneous Files

END-OF-TERM REPORT HEADINGS

Menu option: **Miscellaneous Menu - Miscellaneous Files - End-of-Term Report Headings**

Report Card headings may be amended for each school. Headings appear at the top of printed Report Cards, and at the top of screens showing subject marks.

HEADINGS & LETTER GRADINGS

For each subject, two % marks and four A-F gradings may be stored per term. The screen above shows the default headings:

- exam mark (%) (with automatically calculated exam average % column)
- class assessment (%) (with automatically calculated class assessment % column)
- Homework (grading)
- Effort (grading)
- Contribution (grading)
- Behaviour (grading)

Each of the headings in the screen above may be modified to suit Eg 'Class Asses' (% mark) could be changed to 'Exam Pt 2', with the automatic average column heading also being changed to 'Exam2 Ave'.

Any headings which are *not* required should be replaced with blanks. Blank headings will not print on the Report Card or on the tops of screens. During data entry, blank columns are by-passed.

COMMENTS by non-teaching staff:

The headings "**Entered by:**" refer to the comments which may be downloaded for non-teaching staff to enter for the end-of-term reports. Provision is made for comments to be added to student Report Cards by up to four non-teaching staff. The titles of the non-teaching staff may be changed to suit. The default non-teaching staff titles are:

- Home Class Teacher
- House Teacher
- Year Coordinator
- Principal

See **Teacher** details below, for allocation of non-teaching responsibilities to teacher codes.

The '**selected by**' criteria define the way in which download data is selected for each of the non-teaching staff. Eg Students being downloaded to disk for a Year Coordinator will not be usually grouped by Sports House, but might be grouped by school year. Hence, for the Year Coordinator, 'Home Class', 'House' and 'Tutor Group' selections are not ticked.

MAXIMUM NUMBER OF LINES PER COMMENT:

When student data is downloaded for non-teaching staff, provision is made in ReportWrite software (transferred to disk) for comments to be entered directly to the screen, in the same way as comments are entered by teaching staff. (Non-teaching staff may also review and change the spelling and grammar of comments already entered by teaching staff.)

Comments being entered are keyed within the lines of a comment box, and if a comment exceeds the size of the comment box, a message is displayed which insists that the size of the comment be reduced. The maximum size of all comments (in LINES) is set here:

eg Maximum No. Lines per comment (2-7): 5

NOTE: If there is to be no maximum restriction on comment lengths, this number may be deleted (position the cursor over the number and hit the 'Delete' key, and then 'F4' to save.

SUBJECTS

Menu option: *Miscellaneous Menu - Miscellaneous Files - Subject Files - Subjects*

The subjects that are undertaken by a student are referred to by means of a *four character code*. eg **CHEM** for Chemistry. The codes may be allocated to have special meanings, eg **CH2U** for Chemistry 2 Unit, or **CHR1** for Chemistry Red Class in elective line 1, etc. You may adopt any coding system that suits, as long as each subject is represented by four alphanumeric characters. Note: a subject code can be used by more than one school year or level.

If a subject is marked as Curricular, it is allocated to a student in one of the first 24 subject positions for the term. If the subject is Co-curricular, it is allocated to subject positions 25 to 32 (see Student Subject and Mark screens). Curricular subjects may have an Exam Mark, an Assessment Mark, and ratings (A to E) for Homework, Contribution, Effort and Behaviour. Co-curricular subjects only have A to E ratings for Contribution, Effort and Behaviour (*not* Homework).

The Possible Total Mark (which is OPTIONALLY entered) is printed on students' end-of-term Reports.

The total number of subject codes used within the school is unlimited. It is preferable **not** to delete subjects codes when they discontinue, because past students' academic details may refer to subject codes that are now discontinued.

SET EXTRA SUBJECT MARKS

See [Outcomes Based Reporting](#)

SET DESCRIPTORS PER SUBJECT

See [Outcomes Based Reporting](#)

REMOVE DESCRIPTORS FROM SCHOOL

See [Outcomes Based Reporting](#)

SET DESCRIPTOR HEADINGS

See [Outcomes Based Reporting](#)

TEACHERS

Select *Miscellaneous Menu - Miscellaneous Files - Teachers*

All Teachers within the school are assigned a three letter code. Teacher initials may be used, or any other unique identifier.

The 3-letter teacher code is entered in Timetable Teacher/Class Allocations. The same 3-letter code is seen on Students Subjects and marks screens, indicating the teacher of the class.

The graphic picture file of a teacher should be named according to the Teacher's 3 letter CODE. eg DBG.jpg. The graphic image file should be placed in the IMAGES sub-folder beneath the SchoolWrite folder (eg \ SW \ IMAGES).

The total number of teacher codes used within the school is unlimited. It is preferable **not** to delete teacher codes when they discontinue, because past students' academic details may still refer to teacher codes that are now discontinued.

Non-teaching responsibilities (ie supervision tasks) may be allocated to teachers.

YEAR: When a Teacher is a year coordinator, ie has responsibility for a school year, the year is entered here. See **Comments entered by** in End of Term Report Headings (above).

HOME CLASS: When a Teacher is a Home Class Teacher, ie has responsibility for a Home Class, the Home Class code is entered here. See **Comments entered by** in End of Term Report Headings (above).

HOUSE: When a Teacher is a House Teacher, ie has responsibility for a sports house, the house is entered here. See **Comments entered by** in End of Term Report Headings (above).

TUTOR GROUP: When a Teacher is a tutor group teacher, ie has responsibility for a tutor group, the tutor group code is entered here. See **Comments entered by** in End of Term Report Headings (above).

INCIDENTS: Double-click on <click> for a new screen of Incidents (accidents / sicknesses / absentees) for the required Teacher.

Each Incident has an ascending number automatically allocated when a new record is added.

Date of Incident: defaults to the current Processing date

Reported by: Details are keyed

Accidents / Illness Code or Details: Text can be keyed **OR** standard Accident / Illness codes & details can be automatically selected from a drop-down list. These Codes are set in *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Acc/Sickness Codes*.

Treatment Code or Details: Text can be keyed **OR** Treatment codes & details can be automatically selected from a drop-down list. These Codes are set in *Students Menu - Student Miscellaneous - Miscellaneous Student Files - Treatment Codes*.

Further Details 3: Text can be keyed.

LIST OF INCIDENTS: A printout of Incidents for the one Teacher is produced. The option is given to enter a *Starting Date* for the list.

COMMENTS

Comment codes may be used by a teacher to "fill in" the subject comment being prepared. Under **Student Details - Marks - Comments - F9 Enter Comment** - the F2 key is used to bring up the list of available standard comments. The same *standard comment database* is available to teachers using ReportWrite software. Again, a function key is used to call up a standard comment by its number.

Standard comments are for use in the Student Mark Entry screen, and in ReportWrite screens.

Each comment is identified by a **four digit** comment code. Therefore, the maximum number of standard comments which can be held on file is 9,999.

Standard Comments may have the **implied** student name embedded, by using the **#** character. The student's preferred name is inserted here.

STANDARD COMMENT SUGGESTIONS

In a co-educational environment, standard comments should be written to AVOID reference to sex, or to 'his', 'hers', etc.

Alternatively, **odd** numbered codes could be worded to refer to males (his etc.) and the next **even** number to refer to females (hers etc.).

Comment codes could be assigned to number ranges relevant to subject groups. eg 1000-1100: Sciences 1101-1200: Maths 1201-1300: Economics 5000-6000: Primary school

The **active** flag may be set to N for particular codes that are no longer used. This control may be applied temporarily to comments that are being over-used.

The LIST option provides a hard copy of all comments and their codes.

IMMUNISATION DOSES:

Standard immunisations and the maximum number of required doses required may be entered here.

NOTE: When no data is entered here, there is a default of the following 5 standard immunisation types and doses. These five can be overridden by entering all required immunisation details here.

Default standard immunisations:

Immunisation	Maximum Doses
Diphtheria	5
Tetanus	5
Whooping Cough	5
Measles	2
Polio	4

Up to 10 standard Immunisations may be entered here. Any entered after the first 10 are ignored.

Standard Immunisations are seen on the Students Details screen and Enrolments Details screen - under the **Medical** Tab. The details are also reported on in ***Students Menu - Printouts & Reports - E.Allergies & Immunisations***. Through this report it is possible to identify students at school who have incomplete immunisations for any particular disease outbreak.

Passwords

Passwords into the SchoolWrite system are optional. When commencing a session of SchoolWrite, a valid password must be entered if passwords are in use. Three attempts are allowed to key in a correct password. After three attempts, the program terminates.

The user's name is also requested, along with the password.

ANY valid password is sufficient to get the user into the SchoolWrite system. But how much further the user can go depends on the settings allocated to the password in use.

The current maximum number of passwords that can be set is 20. This is *not* the maximum number of users. This maximum represents the number of groupings of users within the school. Often the one password is allocated to several different users (eg Teachers with the same level of access may all use the same password, and Admin Accounts staff will have another password, etc, etc).

NOTE: If no passwords have been set, access is allowed to **all** SchoolWrite areas.

A password is first created, and then accesses for that password are allocated to each of the following menu areas:

- o Students
- o Parents
- o Past Students
- o Enrolments
- o Miscellaneous
- o Timetable
- o General Ledger
- o Creditors
- o Payroll

To allocate a new password, click on any one of the above modules, eg Students, and select <<NEW>>. Then enter the password. It will show in capitals - passwords are **not** case sensitive.

A list of SchoolWrite functional areas is shown, and access to each module must be set, as follows:

ESC=Quit Password: DEMO123

General Ledger	Creditors	Payroll
Past Students	Timetable Printing	Future Enrolments
Password	Miscellaneous	Students
		Parents

Subsidiary databases

Registration	Attendance	Subjects
Address	Discipline	Phone
Diagrams	Imagery	Email
Church	Transport	Student Notes
	Parents	Background

Add/Edit/Delete Students

ADD	EDIT	DELETE

Family Notes

G Family Notes

Marks & ReportWrite update

1 Marks

Student Miscellaneous Menu & Refresh Intranet

Student Miscellaneous

Student Lists

Printout and Reports

F4 Apply F5 Delete

The levels of access are typically:

- Update
- Display
- No access

Once the first module has been established, accesses for the same password must be set in each of the other modules, eg Parents. The process from here on is to *modify* the password accesses. If you do **not** set accesses in one or more modules, the access levels will remain at the default **No Access** level.

After access levels have been set, hit the **F4 Apply** button, to stay within Passwords. You may now select another Password and set its access levels.

If you are deleting a password, select **any** module area, and hit **F5 Delete**. The password will be deleted for **all** modules.

Note: it is **not** possible to change the spelling of a password. It is necessary to delete the password, and add a new one with the desired spelling.

At least one password must have access to **Maintain Passwords** (!) This is checked before you leave the Password area. If necessary, the screen will display a message like this:

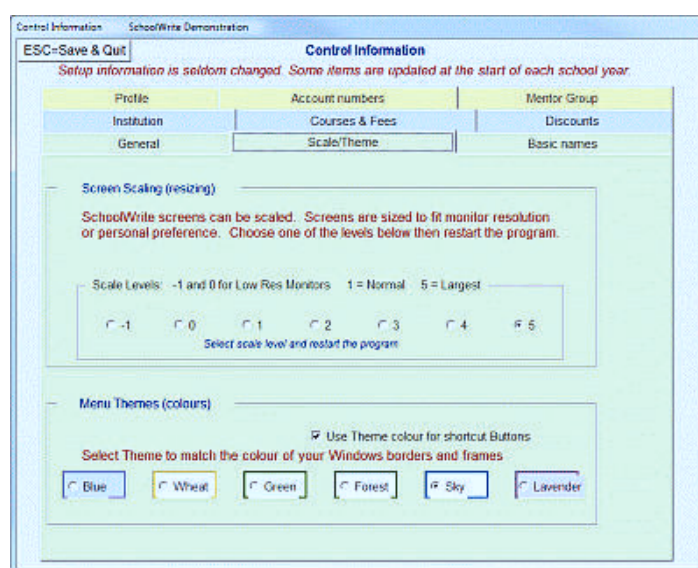
*So far **all passwords** are denied access to the option to maintain Passwords. Somebody **has to** have access .. and for now, it's going to be **this password** - xxxxx*

Control Information

Menu Option: **Miscellaneous Menu - Control Information**

There are 9 areas where setup Control Information is stored. Usually these areas need not be accessed after initial setting up. The **Profile** area needs to be accessed at the start of each year, to update *Term commencement dates*. The **Fees** area needs to be accessed when Term Fees need updating. Most other areas are rarely changed.

- o **Profile & General Setup** See [Profile Setup](#)
- o **A/c No's** See [Account Numbers Setup](#)
- o **Houses** See [Sports Houses Setup](#)
- o **Fees** See [Fees Setup](#)
- o **Discounts** See [Fees Discounts Setup](#)
- o **Institution (Internal Codes)** See [Institution](#)
- o **Basic Names** See [Basic Names](#)



SCALE/THEME

SchoolWrite WINDOWS can be sized (scaled) to suit each Work Station. Different Work Stations on the network can have different settings. Screens can be scaled to fit monitor sizes or personal preference... large scale (3, 4 or 5) can be set for big monitors, or small scale (0 or -1) for laptops. If some letters are missing or some words do not fit on the screen, scale the size up or down to suit.

Colour Themes may be set to match personalized Windows colours, or personal preferences. (Search for 'personalize' in Microsoft Windows, to change colour schemes for all applications).

Save or Quit

3 options are available: (1) **Save** all changes made (2) **Discard** changes, and (3) **Continue** to make further changes in the Setup screens.
(A new colour THEME may be set only for the duration of the SchoolWrite session, by **not** saving the changes.)

When a User's password does not allow access to Control Information, the Scale and/or Theme must be set by the system administrator. After logging back into SchoolWrite with the regular User's password, the Scale / Theme will remain set for that Work Station.

Initialise Data See [Initialising Data Files](#). This is a hidden menu option - and should be used with great caution.

Setup Email / SMS

Select Miscellaneous Menu - Setup Email / SMS

Select Email Server

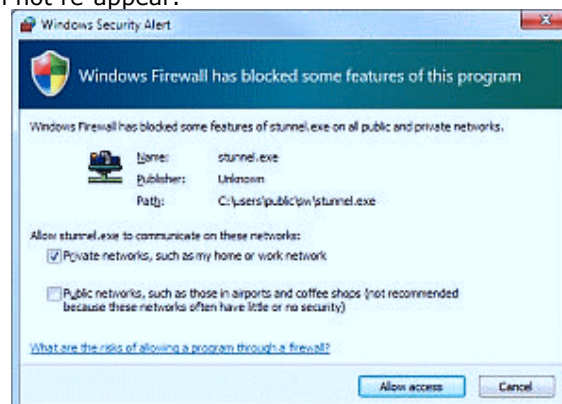
Details of an SMTP email server must be entered, along with password.

The SMTP email server name will typically be named "mail.XXX.com" where XXX is part of your email address, such as name@XXX.com. Your SMTP server name can also be found in the setup information for your normal email program, such as Microsoft Outlook or Thunderbird.

Gmail, Hotmail (or Outlook.com or Live.com) and Yahoo servers may be used - with limitations. The preferred server is one supplied by the Internet Service Provider. This is a professional service, it is unlimited, reliable, not expensive and easy to configure. Alternatively, the free webmail servers (Gmail, Hotmail, Yahoo) are limited to 100 emails per day (consult Google "gmail smtp limitations" or "yahoo smtp limitations", etc).

First-time use of Gmail, Hotmail (or Outlook.com or Live.com) or Yahoo email servers:

The first time that an email or SMS is sent with one of the free webmail servers, or the first time the *Test email connection* button is clicked, a special connecting program called STUNNEL is automatically initiated by SchoolWrite. Windows security alert will ask permission to access this program. This screen will not re-appear.



The correct response is to tick **Private Networks**,

and click on **Allow Access**

The following fields need to be filled in on the email/SMS setup screen:

SMTP mail server	<p>For both Email and SMS messaging, this is the same:</p> <p>Your SMTP mail server name will typically be named "mail.XXX.com" where XXX is part of your email address, such as name@XXX.com. Your SMTP server name can also be found in the setup information for your normal email program, such as Eudora or Microsoft Outlook. All email programs require a SMTP server host name (or IP address) before they can send email. So if an email program is installed on the computer, the SMTP that it uses can be found. For example:</p> <p>Eudora: Tools / Options / Sending Mail / SMTP Server:</p> <p>Outlook Express: Tools / Accounts / Mail / Properties / Servers / Outgoing mail (SMTP)</p> <p>Outlook: Tools / Options / Mail Setup / E-mail Account / View... / [Next] / Change... / Outgoing mail server (SMTP)</p> <p>Mozilla Thunderbird: Tools / Account Settings... / Outgoing Server (SMTP) / Server Name:</p> <p>Netscape Mail: Window/Mail & Newsgroups / Edit / Mail & Newsgroups Account Settings... / Outgoing Server (SMTP) / Server Name:</p> <p>The SMTP mail server name can also be specified in dotted decimal notation if wanted. For example "10.23.231.1".</p>
Port #	<p>Because of the increasing problem of spam, some SMTP servers block port 25, but accept port 587 instead.</p>
Authentication Required	<p>Your SMTP mail server may require you to use outgoing Authentication for emails. This is typically done to reduce the risk of spam email being generated. All 3 fields are required for satisfactory verification of outgoing emails. A security mask is used on the screen after entry. The information required to complete these fields is provided by your internet service provider. If you are required to Authenticate, your provider will supply the required details as standard for settings for all outgoing emails.</p> <p><u>User account</u>, <u>Password</u> and <u>Port</u> are all required for satisfactory verification of outgoing emails. A mask of asterisks is used on the screen after entry for confidentiality.</p>
<hr/>	
OR	
<hr/>	
Free webmail SMTP server (Gmail / Hotmail / Yahoo)	
User Name	This is the webmail username. eg myname of myname@gmail.com
Password	The webmail password Note: For security, asterisks (****) appear in place of the User Name and Password
<hr/>	
From email	<p>The FROM email address is seen in the In box of the email recipient. This will be the email address for school administration. eg admin@schoolwrite.com For free webmail SMTP servers, this address will be the above User Name (eg myname@gmail.com)</p> <p>The FROM address is also required for sending SMS messages to the SMS-to-email Provider. This is the school email address that has been registered with the SMS provider.</p>

Reply email	The REPLY email address is often not seen by the email recipient. This is the email address used when the recipient hits the Reply button.
	The REPLY address is optional, and when omitted, the FROM email address is used for the Reply.
Format email	<p><u>Rich Text (HTML) & Logo:</u> This generates emails with the school logo and address at the top, followed by the text of the Standard Letter.</p> <p>The graphics file and text lines are taken from SchoolWrite's Letterhead Graphics. The text from Text Lines 1, 2 and 3 are included. (Note: when a Text Line in Letterhead Graphics has zero coordinates it is not printed on the Letterhead, but it will be included at the top of the email. This allows email addresses, etc to be included in email notifications, but not included in Letterheads.)</p> <p><u>Plain Text:</u> Only the text of the Standard Letter is included in emails, without the school logo or letterhead address details.</p>

Test email connection button. By clicking on this button, the system checks to see if the internet connection is available and on-line. It verifies the SMTP Mail server address.

If an internet connection needs to be dialled, it should be dialled and connected before clicking on the **Test email connection** button, or before selecting **F4 Send emails**.

The results of testing the email connection are either:

Successful connection - you can send emails

or

Cannot find SMTP/POP3 server

Error Tracking: A file named EMAIL.LOG can be created, which will list every step along the way, from connection to the email server to item-by-item transfer.

The trigger to create it is the file 'emaillog.\$v!' in the SW directory (any contents, just the presence of the filename acts as the trigger)

EMAIL.LOG should not usually be created because it gets very large. Remove the trigger file 'emaillog.\$v!' when problems are solved.

The above email setup fields are required for sending SMS messages (via a provider such as Clickatell) as email is used to send the messages to the SMS Provider.

Now proceed to setup an account with the SMS provider (eg Clickatell) - [click here](#)

Sending SMS text messages

SMS Text messages to cell phones are sent via email.



SchoolWrite sends emails to the SMS Provider, Clickatell. Clickatell receives the emails, with destination cell phone numbers included, and sends them on.

Clickatell is a commercial provider of **Email to SMS** (SMTP) services.

Clickatell is a leading provider of messaging services with reliable coverage to 578 networks in 192 countries worldwide. Clickatell charges **per message** at wholesale prices with a sliding scale for bulk purchases. Generally 1 SMS Message costs 1 SMS credit, with some destinations costing only 0.8 credit.



[CLICK HERE](#) to check Clickatell's charges

[CLICK HERE](#) to check Clickatell's coverage by Country

[Open an account with Clickatell](#)

Open an account with Clickatell

Setup and registration with Clicktell is free.



HOW TO REGISTER:

Register for a free Clickatell SMS Gateway Connect/API Account:

[Click here for Free registration](#) with Clickatell and receive 10 Free SMS credits. Select the option:
Developers Central

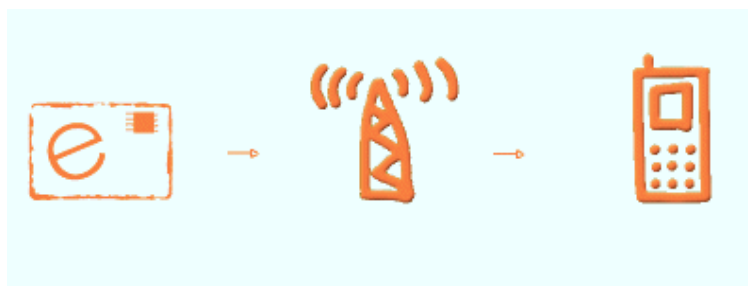
Step 1 - Fill in your registration details. Please note that you must ensure that **your** email and mobile numbers are correct, otherwise you will not be able to complete your registration.

Step 2 - Confirm that the details you have provided are correct.

Step 3 - Retrieve a code sent to you via email and enter it in the empty email verification field. Retrieve an SMS code sent to **your** mobile phone and place in the empty SMS verification field.

Step 4 - Your new account has been established with 10.0 free credits, and a **Client ID** has been allocated. Make a note of the Client ID - required for logging into your Clickatell account subsequently.

Step 5 - When logged in to your new Clickatell account, Select Product Control from the left hand Menu - then select **SMTP** from the sub-menu. Under **Give this product a name** enter a name, eg **Absences** Your account has now been allocated an **api_id** (you will need this later). Make a note of: the **api_id**, the **User** name and the **password**. These are all used later in a SchoolWrite screen - **SMS Setup**.



Login to your Clickatell free Account to purchase SMS credits

Preparing to send SMS Messages

SETUP STEPS:

The following setup steps are required to send automatic SMS and email messages to parents.

STEP 1 - for SMS messages:

Parent **cell phone numbers** should be entered on the Parent details screen. **SMS Notify?** should be set to Y

Cell phone numbers are entered without the country prefix - and always start with a zero. All cell phones (mobile phones) are capable of receiving SMS text messages from SchoolWrite. Landlines cannot be used for this.

STEP 2 - for emails:

Parent **email addresses** should be entered with **Email Notify?** set to Y]

DAILY STEPS:

Absence alert absentee notifications:

STEP 3:

Student **absentee details** should be entered on the Student screen - **SMS/Email Notify?** should be set to Y

The **SMS/Email notify** flag defaults to **Y** if any cell phone or email address for the parent is marked for **Notify** absence. If the parent does not have a cell phone or an email address marked for Notify absence, the student's **SMS/Email notify** flag defaults to **N**.

Absentee SMS/email notifications

ESC=Quit

Starting Year: 1

Ending Year: 10

Home Class: (Leave blank for ALL)

Absent on: 27/07/2005

Enter starting Year

Send notifications:

☒ SMS ☒ email

F4 Prepare SMS & emails

Step 1: Mark Parents cell phone numbers with NOTIFY. Step 4: F4 Automatically prepare messages to Parents for given absentee date.

Step 2: Mark email addresses with NOTIFY. Step 5: F5 Preview items to be sent.

Step 3: Enter student absentees with NOTIFY. Step 6: F6 Send notifications now.

Absentee notifications are previewed prior to being sent. The 'HOLD' flag on each absentee record may be changed prior to being sent.

F5 Preview & List SMS & emails F6 Send SMS & emails

Select Parents Menu - Absentee SMS/email notifications

STEP 4:

Enter a nominated date of absence, and click on the Prepare SMS button or hit the F4 key.

Note: When 2 or more siblings are absent on the same day, only one email notification is sent. If the student name is included in the SMS, then student names for all siblings with absentee records are included.

OR

General SMS/email notifications:

STEP 3:

Select *Parents Menu - Communicate with Parents*.

The parents to be notified must first be selected, according to certain criteria:

- range of Parent codes, and
- Parent categories, and
- Parent balances over a specified amount

OR

- Parents of Students in a nominated range of school grades and/or Home Classes.

Note: Selected parents to receive an email will have **Notify (Y/N)** set to **Y** against at least one of their email addresses (see Parent Details screen). Parents to receive an SMS message will have **SMS Notify (Y/N)** set to **Y** against at least one of their phone numbers.

Select Parents Menu - Communicate with Parents

STEP 4:

Hit the button: **F5 Select & List SMS & emails**

STEP 5:

Preview SMS and email records. These are presented in date order, showing the most recent entries at the bottom of the list. They are in GREEN if the emails are ready to send, they are in RED if they have been sent, and they are in YELLOW if they are on hold.

Changes may be made prior to sending messages. eg cell phone numbers may be amended.

Individual records may be deleted.

Individual records may be placed on HOLD and they are not sent.

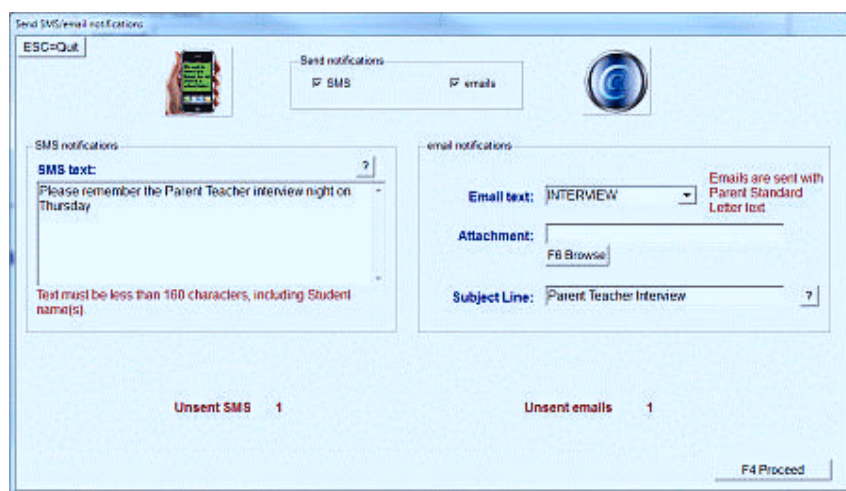
When "Date sent" is deleted, the record changes from RED (sent) to GREEN (not sent).

A printout is requested by clicking on the List button. The printout is for a nominated date or for all dates, for messages to be sent or for messages sent. The printout serves as a log of items sent, or as a check sheet prior to sending messages.

Note: The preview and list for **absentee** notifications is a different preview and list for **general SMS/email** notifications

STEP 6:

Select the button: *F6 Send SMS & emails*



Enter the required SMS text message, of less than 160 characters.

Ensure Country Code is correctly set for your country. **Note:** Parent Phone numbers in the Parent Details screen should **not** be prefixed with the country code. *This* screen should be the only place where the country code is included. All other phone communications with parents are considered to be "local" and require only area codes within the country.

Hit the button **F4 Proceed**. The processing for this step is done in the background. A progress bar is visible at the top of the screen while it is taking place. All unsent messages are sent, unless they are marked Hold. The date and time of sending are automatically placed in the right hand columns.

SETUP:

For SMS messages, it is necessary to first set up SMS provider - which is done from the **Send SMS** screen.

For email setup, see [Email notifications screen](#).

For both SMS and emails, the following 2 lines must be correctly entered:

- From email
- SMTP mail server

Setting up SMS Provider and SchoolWrite

First Open an account with Clickatell. The account will have a user name, a password, and an api_id.

The left hand portion of the screen has setup details, and includes the button **SMS Setup** and an entry for **SMTP Mail server**

SMTP Mail server

This is the mail server of your internet service provider, not of Clickatell or other SMS Provider.

Your SMTP mail server name will typically be named "mail.XXX.com" where XXX is part of your email address, such as name@XXX.com. Your SMTP server name can also be found in the setup information of your normal email program, such as Eudora or Microsoft Outlook. All email programs require a SMTP server host name (or IP address) before they can send email. So if an email program is installed on your computer, the SMTP that it uses can be found. For example:

Eudora:

Tools / Options / Sending Mail / SMTP Server:

Outlook Express:

Tools / Accounts / Mail / Properties / Servers / Outgoing mail (SMTP)

SMS Setup:

Setup for Clickatell SMS Provider:

There are four required lines (& 1 optional line) each with headings followed by a colon.

email_to:*sms@messaging.clickatell.com*

user:*myschool*

password:*mypassword*

api_id:*12345*

from:*My School*

email_to

SMS's to be sent via Clickatell will always have the address sms@messaging.clickatell.com

user:

This is the user name used to establish the Clickatell account. The user name is also found in the "Clickatell Registration Details" email sent as part of the account setup process.

password:

This is the password used to establish the Clickatell account.

api_id:

This is a unique 7 digit number assigned to your Clickatell account. You can log on to Clickatell (with your user name and password) to retrieve this from your Account details.

from: (Optional)

This is the name of your school, using only 11 alphabetic characters, numerics and spaces. Full stops, commas, dashes and other special characters should be avoided.

The *from* name will appear in each SMS received. It may be the abbreviated name of the

school, or it may be the school phone number.

Some receiving cell phone carriers do not support the *from* option. In this case the *from* line can be omitted, and Clickatell will set a default originator number.

to: This keyword is not included in the setup parameters because it is automatically included with each cell phone number.

text: This keyword is not included in the setup parameters because it is automatically included.

The keywords *to* and *text* may be substituted with replacement keywords - see below.

Setup for other SMS Providers:

The setup for other SMS Providers follows the same required lines. Keywords can be replaced by adding extra lines to indicate replacement, as follows:

[api_id/SendID] - indicates that the Keyword **SendID** replaces **api_id**

Then the keyword line will be:

SendID:12345

eg

Setup example using World-Text.com as SMS Provider:

email_to:bulk@sms.world-text.com

[user/Username]

Username:myschool

Password:mypassword

[api_id/SendID]

SendID:12345

[to/Recipient]

Letterhead Graphics

The SchoolWrite letterhead is "designed" here: **Miscellaneous Menu - Letterhead Graphics**

The SchoolWrite Letterhead is printed (optionally) on

- Parents Fees Statements
- Parents Fees Receipts
- Parents Standard Letters
- Future Enrolment Letters
- Past Student Letters

There are several graphics components which can be positioned to make an interesting and professional presentation. Any component (eg Frame, Shade Area, etc) may be omitted by setting coordinates (width, height) to **zero**, and text to **spaces**.

The graphics components are:

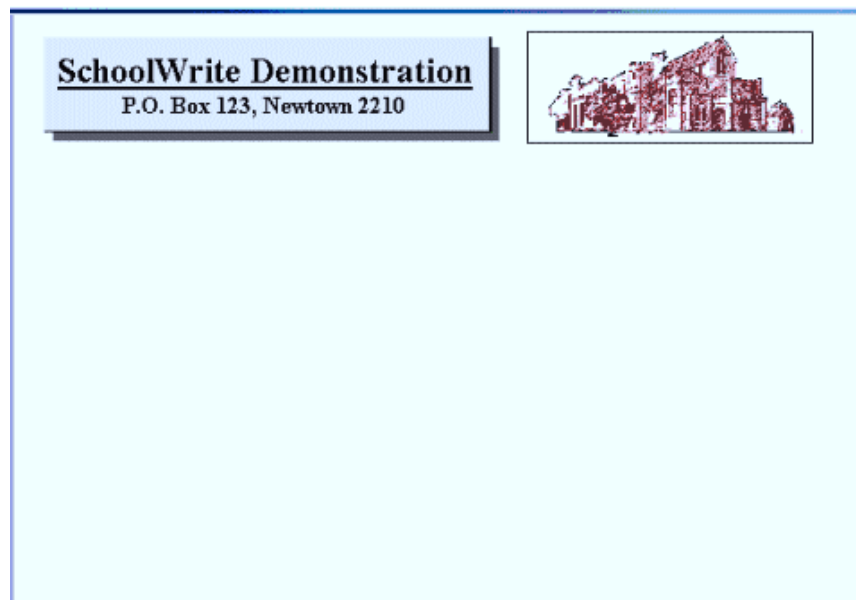
- 1 x graphics file
- 3 x text lines
- 1 x frame
- 3 x shade areas
- 1 x vertical line
- 1 x horizontal line

The **graphic** file that may be included in the letterhead (eg School logo) may be any standard .bmp, .gif or .jpg file. This same graphic is used at the top of printed reports, unless otherwise suppressed. See Printer Settings.

The X and Y coordinates for each item in the letterhead graphic start with an **origin** at the **top left** corner of the page.

X coordinates are specified between 0 and 8 inches (across the width of a page), and Y coordinates are specified between 0 and 11 inches (down the length of a page).

Example:



Note: For default settings on Letterhead graphics, the file **swhplogo.dbf** in the SchoolWrite folder (directory) may be deleted when everyone is logged out of SchoolWrite. The next access to **Letterhead Graphics** in the Miscellaneous Menu will re-create the default settings.

Register Software

SchoolWrite software is first installed as Demonstration software. The demonstration software is limited in file sizes, but not in functionality.

The Demonstration software needs to be **registered** to remove the file-size limitations.

Select from **Miscellaneous Menu - Register Software**.

Register software

To obtain a licensed version of SW software, enter your LICENCE NAME. Use 40 characters or less, with upper & lower case as required.

FAX or email your Registration and payment to receive your REGISTRATION KEY. Your registration is only complete when you have correctly keyed your Licence Name, and Registration Key.

SchoolWrite
PO Box 108, WYU-Moon Harbour
Bobby +254 01 127 4020
Hellen +254 01 632 7785
www.schoolwrite.com/standrewschool
Hellen.Dengwa@schoolwrite.com

Request
Request User Registration Key with Payment

Modules
☒ Students
☒ Parents
☒ Past Students
☒ Timetable Periods
☒ Future Enrolments
☒ General Ledger
☒ Payroll
☒ Creditors
☒ Reports/Intr

Credit Card
☒ Visa
☐ Mastercard
☐ Licence
☒ per Year
☐ Unrestricted

Card Number
- - - - -

Name on Card
- - - - -

Expiry Date
/ (month/year)

LICENCE NAME
SchoolWrite Demonstration

Address
St Andrews School
PO Box 3342 Newtown

Phone
-

Fax
-

email
admin@standrewschool.com

Register
Enter User Registration Key received

Licence Name
SchoolWrite Demonstration

Register on File

F4 Order On-line F5 Print Request F6 Register Now F7 File Sizes

1. Request a User Registration Key

The User Registration Key can be obtained from the dealer, representative or sales-person who introduced you to SchoolWrite. The Dealer's name and address is seen at the top right of the Register Software screen.

You may wish to email or fax your request for a Registration Key, along with payment for the software licence. Fill in all of the details on the Registration screen.

To print a hard copy ready for faxing or scanning, hit the **F4 Print Request button**.

Your User Registration Key will be sent you by email.

Until a User Registration Key has been supplied, you are free to use SchoolWrite. However, there is a limit to the maximum file sizes. At any time, you may see the current file sizes by clicking on the **F7 File Sizes** button in the Registration screen.

The demonstration system file size limits are:

Students	30
Timetable	200 timetable periods
Past Students	15
Future Enrolments	12
Parents	30
Ledger transactions	40
Payroll Employees	2
Creditors	3

After successfully entering the User Registration Key, all restrictions on file sizes are lifted.

2. On-line request for a User Registration Key

ORDER SCHOOLWRITE ON-LINE

Order on-line

OK

SchoolWrite logo

school administration software

MAIN MENU

- Home
- Brochure
- Components
- Communications - SMS & email
- Benefits
- Download
- Order
- Order Part 2 (credit card)
- Contact

PayPal logo

PayPal and Bank transfer

Contact us for PayPal or Bank Account Details (click here)

Credit card payment

Credit card details are sent to SchoolWrite International (BBA Software) in two parts, directed through two different email servers. This first

Order Form

Contact SchoolWrite in your region for pricing details

School Name (*)

School address (*)

City / Country (*)

Your Name (*)

Your email address (*)

Components (*)

Credit card type (*)

Credit card number (*)

Expiry Month (*)

Expiry Year (*)

Card Verification Code (*)

Amount (US\$) (*)

Card Holder's Name (*)

Send Part 1 (1st 8 digits only)

Part 1

Clear

Maximum 30 characters

selected one or select both

1st 8 digits only

3-digit code on the back of the Card

Contact SchoolWrite Representative for pricing

Academic Records

School Fees & Accounting

Visa

MasterCard

Students

- Student records with indexes, marks and comments
- Attendance & absence details
- Internal timetables

Communicating with Parents

- Emergency phone numbers
- Short SMS & printed communications
- Automatic notifications of student activities

Past students

- Previous students (10000)
- Alumni mailing
- Former or Past Students record

Timetable printing

- Timetables printed by: Teachers, Students and Rooms
- Screen view of Teachers and Students timetables
- Parents have timetables printed for Teachers and Rooms
- Class Timetables printed and Room printed
- Class Teacher Lists

Future Enquiries

- Track Future Enquiries and responses
- Send email to enrolment parents
- Automatic enrolment of schoolchildren

The User Registration Key can be obtained on-line. When you have an Internet connection, hit **F5. Order on-line**. An Internet window will open at the location ready for you to place your order. Your email address is one of the most important pieces of information on this screen - the reply will be sent to your nominated email address.

Internet security: To protect your credit card number on the Internet, complete **only the first 8 digits** on the Order Form. The **second 8 digits** are entered on the screen **Order Part 2** (select from Menu on left). Internet security is provided by splitting your credit card details between 2 servers. Only when both parts arrive at the SchoolWrite office can the complete credit card number be assembled and processed.

The User Registration Key will be emailed within one working day, or less.

3. Enter User Registration Key

Click on **Register** radio button, on the left of the screen. The registration area will be highlighted.

Enter your **licence name**, exactly as it has been supplied to you with the Registration Key.

Enter your **registration key**, exactly as it has been supplied to you. Follow it exactly, with upper case characters, numerics and punctuation symbols such as an equals sign. There are no spaces in the Registration key, and it will look like this:

example only:

HHS6-4570-8LES-QRDG

First 3 and last 7 letters are always alpha or punctuation symbols. Letters 4,5,6,7,8 & 9 are always numeric.

Click on the **F6 Register Now** button. The screen will show if you have entered the details successfully.

The message shows:

Do you wish to register SchoolWrite system?

Answer with **Yes**

The next message is:

***A Demonstration SW Software system is already installed on your disk.
Do you wish to KEEP data from this system, OR start anew?***

Answer by clicking on the **Keep** button, or the **Anew** button.

If you have not keyed any data that you wish to keep, it is best to click on the **Anew** button.

Confirm the **Date format** that you use, the Term start dates and your contact details. Then the registration process will continue automatically.

You are now ready to enter details for your school. See [Setting up Acadmic Records](#)

On-line Help / Print Documentation

SchoolWrite on-line help is found in **Help menu - SchoolWrite on-line Help**.

PRINT DOCUMENTATION / MANUAL

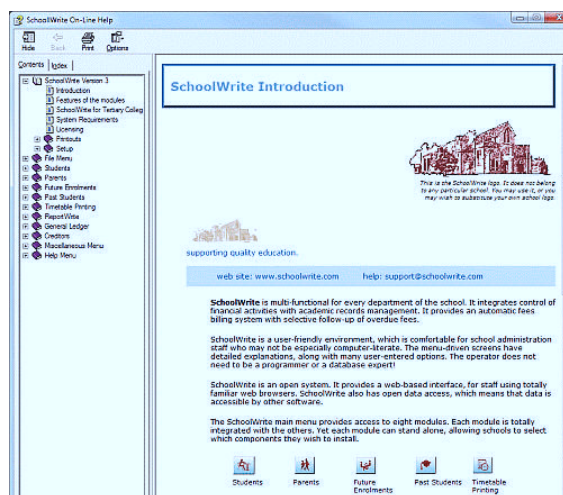
To print a hard-copy of part of the documentation, first highlight the required heading or topic, then click on the **Print** button. The following option is presented:

You can print the selected topic or all the topics in the selected heading. What would you like to do?

- ☐ **Print the selected topic**
- ☐ **Print the selected heading and all subtopics**

Print the selected topic results in a small printout relevant to one particular task.

To print the complete documentation, each of the 12 headings should be printed in turn.



ON-LINE HELP WILL NOT OPEN:

On a computer that is running Windows Vista, Windows 7 or Windows 8, or Windows 8, some workstations will not open SchoolWrite's HELP file. **There is a solution to this problem.** The problem is described in Microsoft's website - <http://support.microsoft.com/kb/917607>

Resolution: Find the link on the above page that matches your operating system, and follow Microsoft's instructions.

OR

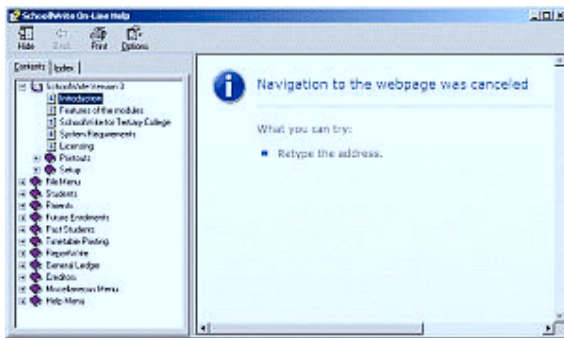
You can change the Help file to SchoolWrite's .pdf file

Download <http://www.schoolwrite.com/sw3.pdf> (8MB) and save into the SchoolWrite folder on the server as C:\USERS\PUBLIC\SW\sw3.pdf

ON-LINE HELP AT NETWORK LOCATIONS:

When attempting to open Help files (.CHM) from a network location, the table of contents appears in the left frame, but the content pane shows **"Navigation to the webpage was canceled"**

Microsoft Windows has placed this restriction (see <http://support.microsoft.com/kb/892675>) because Help files potentially allow remote code execution when viewed away from the host computer.



There are two ways of solving the problem:

1. Change the Help file on the server to a .pdf file

Download <http://www.schoolwrite.com/sw3.pdf> (8MB) and save into the SchoolWrite folder on the server as C:\USERS\PUBLIC\SW\sw3.pdf

Work stations will now open the .PDF file instead of the .CHM file

OR

2. Modify the Registry on each work station

First identify the mapped drive location of SchoolWrite on the network (eg V:\SW).
Modify the Registry on each work station to allow Help file access:

Paste the following text between the lines in a text editor such as Notepad. Then, save the file as fix.reg.

Then, at a DOS prompt, run the following:

REGEDIT.EXE /S fix.reg

```

REGEDIT4
[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\HTMLHelp]
[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\HTMLHelp\1.x\HHRestrictions]
"MaxAllowedZone"=dword:00000000
"UrlAllowList"="V:\SW"

[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\HTMLHelp\1.x\ItssRestrictions]
"MaxAllowedZone"=dword:00000000
"UrlAllowList"="V:SW"

```

Fast keyboard navigation

SchoolWrite is user friendly! That means it is easy to use, and comfortable.

Some people are more comfortable using the **keyboard** rather than the **mouse**. In SchoolWrite, you can use either.

To select modules from the top menu, use the **<Alt>** key plus the first letter of the menu eg **<Alt>/S** for Student menu.

"Buttons" in the middle of screens have an alternate function key eg **<F4>** to Print, or **<ESC>** to quit.

To move down through the fields on a screen, use **DownArrow** or the **<Enter>** key or the **TAB** key, but remember to hit **E** for **Edit** first.

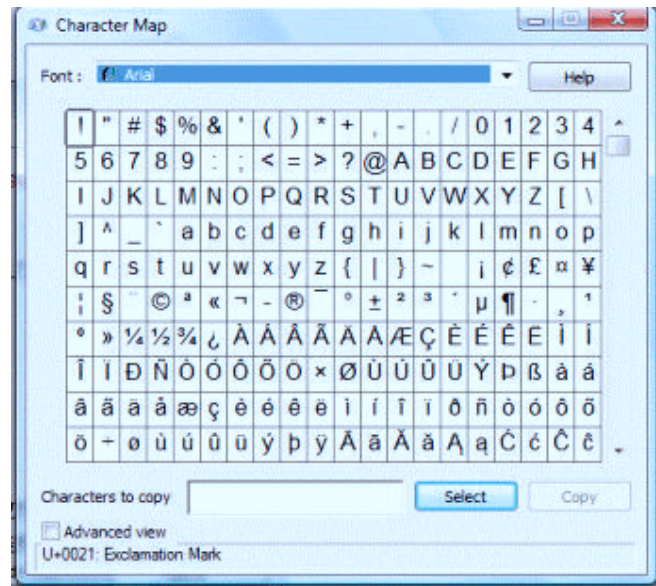
Here is the standard list of keys that can be used:

P or <PgUp>	Previous record
N or <PgDn>	Next record
Home	First record
End	Last record
E	Edit record
PgDn	Finish edit
Tab	Move to next item or Button
Esc	Quit screen
<Ctl> + U	Undo
<Alt> + DownArrow	Drop-down list

Special characters

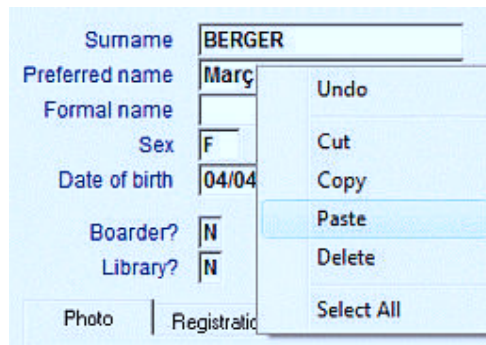
Special characters used in European and African languages may be inserted into text fields. The *Character Map* of possible characters is invoked by **<Alt>/F10** whilst the cursor is in the text field.

Alternatively, the *character map* may be invoked via the Windows **START** button - Programs - Accessories - System Tools.



The *Character Map* will give different special characters depending on the **FONT** selected. Not all special characters will display correctly in the SchoolWrite text field. However, the special characters shown in the **Courier** Font are generally displayed correctly.

Place the desired character in the copy window, and click on **COPY**. The character has now been copied to the clipboard. Return to the SchoolWrite input window, and **PASTE** the character at the current cursor position. **PASTE** occurs either by holding down the **<CTRL>** key and hitting the **V (<CTRL>/V)**, or by right-clicking the mouse, and selecting **PASTE** from the drop-down menu.



If you know the Unicode (3 number) equivalent of the character you want to insert, you can also insert a special character directly into a field without using Character Map. To do so, position the insertion point where you want the special character to appear. Then, with NUM LOCK on, hold down the ALT key while using the number pad keys to type the Unicode character value.

The display of Character Map using the **<ALT>/F10** keys does not apply to numeric fields and date fields, since numeric characters are standard (ie not special characters).

When Character Map has been invoked once, it is then accessible from the Task Bar at the bottom of the screen, with a single left mouse click.

Browsing a data table

When you are browsing a **table of data**, a database in column format, you can *resize* the columns. This can be done with *hotkeys* or with the mouse.

Drag the mouse over the column's edge in the header. This will help in viewing the parts

that are of most interest.

Hotkeys. The Hotkeys have the following effect:

Date	Grade	SMS/Email Notify?
13/06/201	12	N
28/08/201	11	N
29/08/201	11	N
13/07/201	12	N
27/07/201	12	Y
27/07/201	12	Y

J Jump ON: *Jump effect* is what happens **after** hitting the enter key when editing or entering data. When Jump is **on**, the cursor jumps according to the *next* selection. When Jump is **off** the cursor stays in the same position. The Jump effect is toggled on/off each time the **J** key is hit (when *not* in edit/enter mode), or the Jump item in the pull-down menu is clicked with the mouse.

F2 - Jump Right: The cursor jumps to the next cell to the right

F3 - Jump right +next row: Jumps to the next cell to the right, or if is the last column, jumps to the next row, first column. Note: focus will not jump to next row if the last column is not editable and not a memo field

F4 - Jump Down: Jumps to the next cell below, in the same column.

F5 - Shrink Column: The column where the cursor is resting will be shrunk each time the F5 key is hit.

F6 - Widen Column: The column where the cursor is resting will be widened each time the F6 key is hit.

F7 - Freeze Column: Column locking is activated progressively, one column at a time. Frozen columns stay on the screen at all times, whilst other columns to the right are navigated via the mouse or the arrow keys. Locked column headers have a slight grayish cast to give a subtle visual indication.

F8 - Unfreeze all: All column locks previously set are released.

Changes made to the settings of the browse are restored to the default settings when the browse is closed.

Notes for System support

Hidden Menu Options

SchoolWrite has some hidden menu options which are accessed by certain keystrokes, at specific locations.

	Keystroke
Accented characters - Windows character map	
At most data input screens Characters with accents and umlauts can be copied and pasted	ALT/F10
Data File Initialising	
	ALT/F1
At: <i>Miscellaneous Menu - Control Information</i> screen Data files can be initialised (selectively) eg - to remove demonstration data, or - to remove certain data at the start of a school year	
Print Preview of Audit Trails (toggle on/off)	
At: <i>Miscellaneous Menu - Control Information</i> screen Toggle ON - Preview, toggle OFF - always Print. Allow Preview of Audit trails for - Banking & Receipts - Fees Billing - Charges & Credit Adjustments - Interest Calculation	ALT/F2
xDBU Database Utility	
At: <i>Main Menu</i> (all Windows closed) DBF files are selected from a list, for browsing & printing. System Administrator password is allowed to add/change/delete data in files	ALT/F12

Uninstall program

An UNINSTALL.EXE program is placed in the SW folder. BEWARE! It works effectively! For security or to prevent malicious action in the school you should rename it, or delete it.

When UNINSTALL.EXE is back in place, SchoolWrite may be removed from the computer via the **Control Panel - Add/Remove Programs**

SchoolWrite By-line and Splash screen

FRONT SCREEN:

The byline for SchoolWrite is: *SUPPORTING QUALITY EDUCATION*. This byline can be changed, or translated into local language, by a creating a file named SWByLine.\$v\ and inserting revised words.

Alternatively the motto of an individual school could be placed in the file.



SchoolWrite byline



Example of changed byline & graphic

The graphic is placed on the front screen of SchoolWrite. This graphic may be changed by inserting an extra line into SWByLine.\$vl in the format: [GRAPHIC]mypic.jpg (square brackets around the word GRAPHIC - no spaces - and a graphic image that is placed in the SW folder - BMP, JPG, GIF or PNG)

SPLASH SCREEN:

The closing Splash screen plays a 10 second audio (.wav) file. The default is a jazz music ending. The file can be replaced with a message in local language, or any other audio file. The file name is CSWEEP.WAV

Check for Program updates and on-line ordering

CHECK FOR UPDATES ON-LINE:

This option is found in the **File Menu**. It allows direct connection to the SchoolWrite website - software download page. It can be suppressed from this menu. This is preferable for system support personnel who visit SchoolWrite users and provide updates on-site.

ORDER ON-LINE:

This option is found in the **Register Software** option in Miscellaneous Menu. It connects directly to the SchoolWrite website for entry of school registration and payment details. It starts from a button at the bottom of the "Register Software" screen and it can be suppressed. This is preferable for SchoolWrite resellers who package both software and other support services to SchoolWrite users.

Last Man Backup

Automatic Data Backup on exit:

This option is triggered by creating a text file **AUTOBACK.\$VL** in the SchoolWrite folder. The last workstation on the network to exit from SchoolWrite will start an automatic backup.

The file AUTOBACK.\$VL must consist of lines with correct PATHNAMES and FILENAMES of the backup. Eg C:\DAILY\SECURITY.ZIP (choose your own file name). If the PATHNAME is not valid, (eg on Workstation #2) then it will not attempt the automatic backup.

If the Pathname is local (i.e. on Drive C) then either
the PATHNAME should be valid (e.g. C:\DAILY\) and should exist on all Workstations
OR
the PATHNAME should be valid on the Workstation which is most likely to be exited last.

If the Backup PATHNAMES and FILENAMES are valid for all workstations on the network, then the last workstation to be logged off will start the automatic backup.

When multiple PATHNAMES & FILENAMES are listed in the file AUTOBACK.\$VL, the system creates the backup in the Pathname WITH THE OLDEST DATE (or the 1st empty folder). This follows the "grandfather, father, son" principle of backing up.

Off-site backup via Dropbox: On an internet-enabled work station, specify the Dropbox folder location. [See Dropbox.com for free sign up.] Sub-folders within the Dropbox folder can be used to store "grandfather, father, son" versions of backup.

ReportWrite Upload

Upload Security:

ReportWrite upload has security built in to ensure that the correct marks go to the correct subject. The **Line Number** of the subject in the student's subject list must remain unchanged from the time the ReportWrite download is created, to the time of the upload.

Security can be overridden with the presence of the file **RWRITE.\$VL**. The contents of the file are **[SECURE=NO]** or **[SECURE=YES]**. Subject marks and comments *will be uploaded to different Line numbers* when **[SECURE=NO]** is found in the control file. The Control file may be created and amended with a text editor.