

# ***Community Education***

***Worsfold Software Ltd***  
***February 2005***

| <b>Date</b>     | <b>Detail</b> | <b>Version</b> | <b>Person</b> |
|-----------------|---------------|----------------|---------------|
| 4 March 2005    | First release | 1.0.14         | Rory Butler   |
| 12 January 2008 | Updated       | 1.7.1          | Rory Butler   |
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## Conventions used in this manual

Most of the examples used in this manual are from a database of fictitious students and tutors. If and when examples are from actual centres and actual students a black rectangle has been used to obscure names.

<Enter> means 'Press the Enter key'

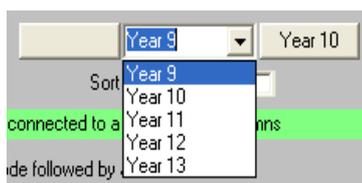
'Ctrl' refers to the Control key, which probably has 'Ctrl' on your keyboard.

'Alt' refers to the 'Alt' key on your keyboard.

'CE' refers to Community Education – the software package

Each chapter begins with an overview of the topics covered therein.

The pages of each chapter are numbered according to the chapter. If you find a topic in the contents or the index in which you are interested then you will find both the chapter number and the page number associated with the topic, e.g. 'The creation of Activities 13.3' means that this topic is to be found on page 3 of chapter 13.



These are popup lists, even though they pull down.

### Multiselecting

Frequently you will wish to make multiple selections from lists. The standard way to do this is to hold down the Control key ('Ctrl') while selecting from the list by left-clicking with your mouse.



# *Chapter 1*

## **Overview and Installation**

|                                  |      |
|----------------------------------|------|
| What is covered in this chapter? | Page |
| 1.1 Overview                     | 1.1  |
| 1.2 Installation                 | 1.3  |

### **1.1 Overview**

This package has been written using Microsoft's Visual basic 6 and employs a single Access database for each year of operation e.g. ce2005.mdb

Its purpose is to replace the original DOS package written and supported for several years by MUSAC.

The basic processes include :

1. The entry of data concerning :
  - a. Users - who have rights to access certain other functions
  - b. Tutors
  - c. Courses - which are taught by the tutors, and incur a specified fee.
  - d. Students - who are enrolled in courses and hence incur the course fee.
  - e. Financial transactions involving students and their courses fees.

2. Printing utilities which allow you to :
  - a. Print course lists (of students taking courses) including registers.
  - b. Print lists of courses
  - c. Print lists of students, and their information (courses, contacts, financial details etc)
  - d. Print lists of tutors
  - e. Design your own lists concerning tutors or students
  - f. Design documents relating to students or tutors using the word processor. This includes the ability to print formal title pages for courses.
  
3. Several utilities which allow you to :
  - a. View course sizes (i.e. maximum and current enrolments)
  - b. Delete those students with no current courses
  - c. Make default settings concerning financial processes.
  - d. View centre statistics (Numbers of students, courses, enrolments etc)
  - e. Print unprinted receipts, invoices, credit notes and statements
  - f. Print invoices and statements
  - g. Make global course changes
  - h. Make a backup of your data (or restore a previously made backup)
  - i. Perform global changes of case.

## 1.2 Installation

Community Education is supplied on a CDROM and is accompanied by a small text file on a floppy disk.

The CDROM contains two sets of files for installation

### 1. The System Files

These are files which your computer requires to enable it to run the Community Education software. They include such things as the printer functions, the Access database functions and the like. These must be installed on EVERY computer which uses CE, even if it is accessed across a network.

### 2. The Program files

These are the files written specifically for the Community Education package. They include the program itself, an empty CE database and the on-screen help files. These need only be installed once – on your computer or, in the case of network use, on the fileserver. Of course, if you are also installing on your home computer then both the system files and the program files will need to be installed there too.

The floppy disk contains a single small file which is your center name (encoded) and used to gain access to the software.

### Installation

Insert the CDROM into your computer and close the CDROM drive door. The installation menu should automatically appear after a few seconds. If it does NOT appear then use Windows Explorer to find your CDROM drive and on it find the program AUTORUN.EXE. Run this program by double clicking on it. The installation menu should appear.



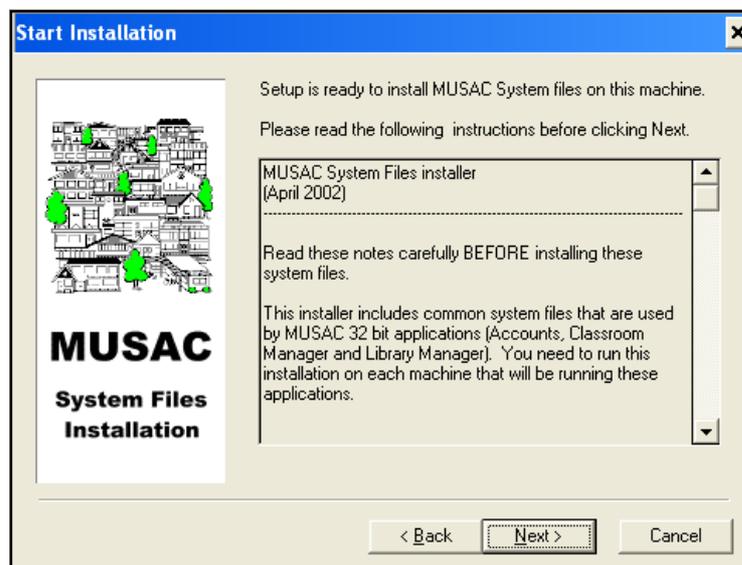
On this screen you will see the two buttons corresponding to the two sets of installation files.

Click on the left of the two buttons to...

### **Install the system files.**

The screen shown will appear. These files are the same as those used by MUSAC for their software and are used by Worsfold Software by kind permission of MUSAC.

Click 'Next', and follow the installation step to their conclusion.



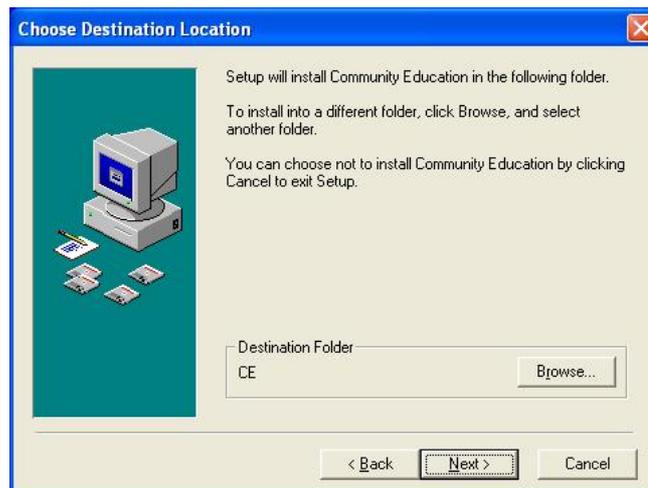
Next, having returned to the installation menu, click on the second button to ...

### **Install Community Education Software**

The 'Welcome' screen will appear. Click 'Next' and you will arrive at the 'Installation destination' screen which allows you to specify where you wish the program to 'live' on you computer.



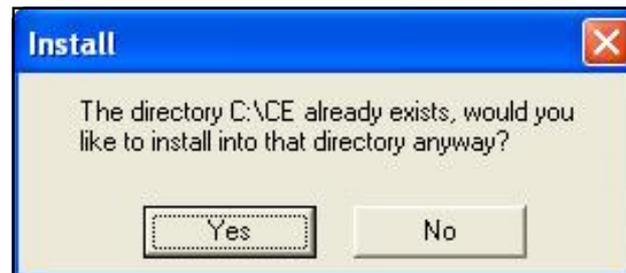
**N.B.** The default entry shown below is CE. However, you should click the 'Browse' button to ensure that your computer does not attempt to install the software on to the CD itself. If you DO proceed then you might well receive a message indication that 'The file CE\Unwise.exe could not be opened' and the installation will conclude unsuccessfully. Do NOT install while the display is as shown below with just 'CE' as the destination folder. Please change it, by browsing is necessary, to e.g. c:\ce



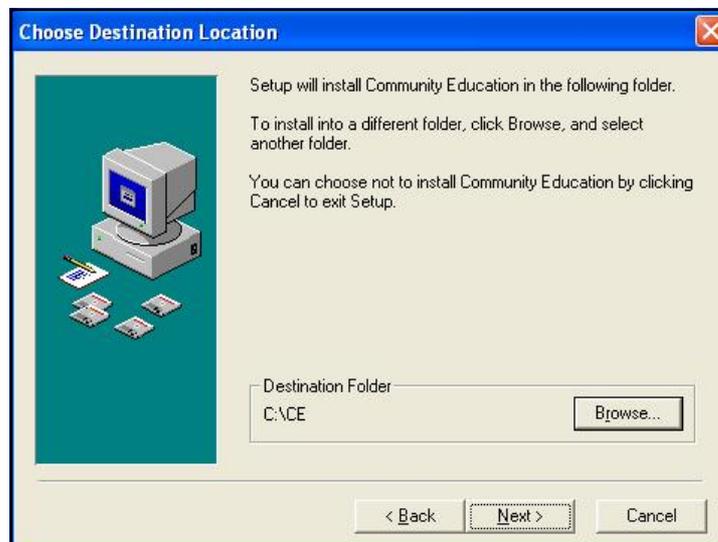
On clicking the browse button, navigate to the drive onto which you wish to install the software. In the example shown I have found drive C: and the top line indicates that I am about to install into C:\CE. If this is OK then click the 'OK' button.



If you have previously installed this package then you should be pleased to receive the message shown. If you have not, then you should not receive this message!



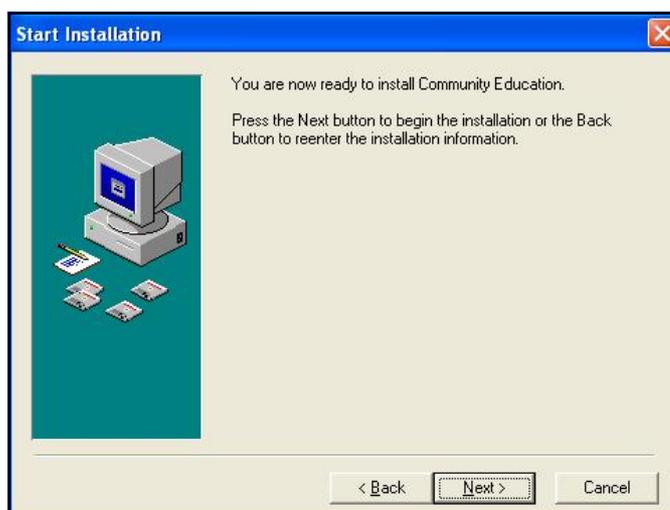
All going well you will return to the previous 'installation destination' screen, this time with a correct destination displayed.



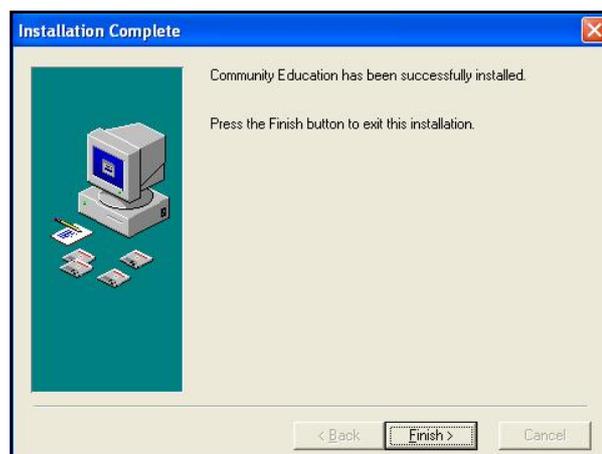
The next step can be skipped. It simply asks you if you wish to have the program file (CE.EXE) placed in a suitably named Program group.



Nearly there. Click the 'Next' button to begin installation. This process takes a relatively short time....



... and, at its conclusion, you will reach the 'Finish' screen, where you should click the 'Finish' Button.



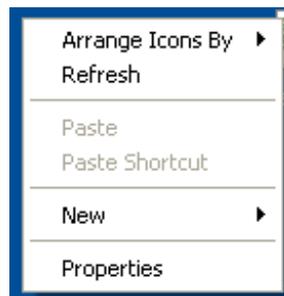
This completes the installation procedure. You are now ready to begin using the program.

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## Running the program

Community Education consists of one application file called ce.exe and this is found in your \ce directory.

You will probably wish to create a shortcut to this program and to have this shortcut on your desktop. To do this, right click with your mouse on the desk top....



Click 'New' followed by 'Shortcut'. The following dialogue (or one like it, depending on the version of Windows which you are running) will appear. Either 'Browse' to identify the location of ce.exe or type it in if you know it. Then click 'Next'



The second step will appear....



... displaying the screen name 'ce.exe'. You might wish to change this to e.g. 'Com Ed'. When you have finished, click 'Finish' and your new shortcut will appear.



Now, to access the program you simply have to double click on the shortcut. Doing so will lead you to the opening ('Splash') screen for the package.



Initially, you should enter using the entry code : **guest** and password : **worsfold**  
 Later on, you will set you own entry or entries up and may wish to change the password for 'guest' so that others cannot enter uninvited.

Once you have successfully logged on you will arrive at the main package screen, from whence all other processes occur.



During your first entry to the package you will pass through a 'Data conversion' process.

### Welcome to Community Education

The program offers two alternative systems of managing the financial aspects of your centre.

The first is a minimal system, where you may manually enter receipt numbers and set and adjust fees. You can print simple receipts and invoices and lists of financial information.

The second is a much fuller accounting process with debts generated and payments received with the ability to print receipts, invoices, statements and transactional lists and summaries.

Consider your decision carefully as, once you have decided then it is not possible to change. If you are in any doubt then seek help, either from the help screen Press F1 or click the 'Help' button below) or contact Worsfold Software for further advice.

**Make your selection here**

Financial system

The simple system

The detailed system

**Help!**

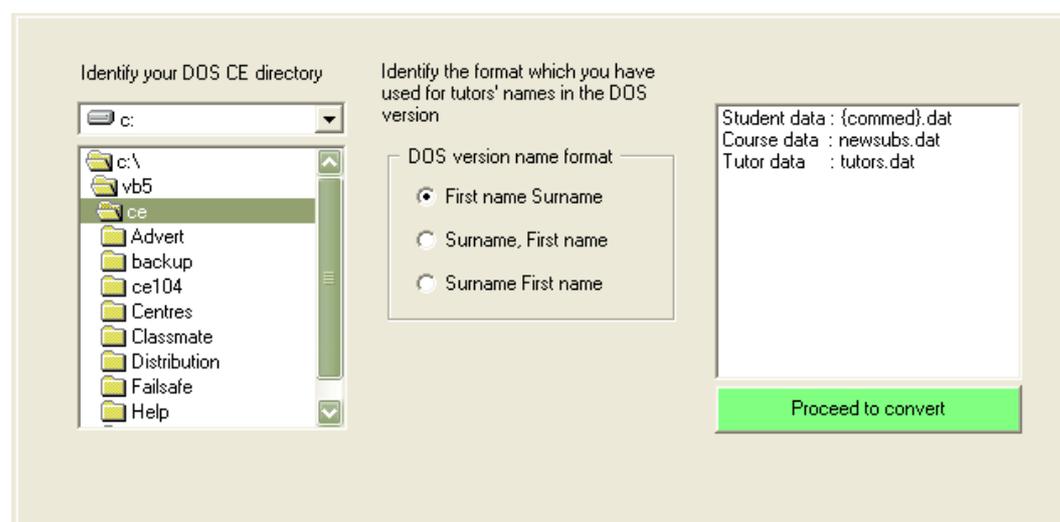
{see under 'Introduction' / 'The alternative financial systems'}

If you wish to convert data from the DOS version of Community Education then click this button

Proceed to convert existing data

On this screen :

1. You MUST make a decision concerning whether you wish to use the 'Simple' accounting system within the package, or the 'Detailed' version. Full on-screen help concerning this is available during the process. See Chapters 4 and 5 for further information concerning the two financial alternatives.
2. You MAY elect to have data from your earlier DOS version of Community Education converted to the new database format. The screen for this process is shown below.



Remember to 'Press F1 for Help' or click the 'Help' menu at any point within the software.

**Once in the program, follow these steps to get up and running.**

1. **Click on the HELP menu to access the help screens.**
2. **Enter yourself, and any others as users - allocating the correct package rights to each.**
3. **Enter your TUTORS**
4. **Enter your courses (and attach the relevant tutor or tutors)**
5. **Enter your students (and attach their courses)**
6. **Print course lists and various other analyses/documents.**

This concludes the installation process. If you have any questions please either :  
call Worsfold Software PH 03 449 2094 This telephone will be answered mainly  
during afternoons. If unattended during mornings you might wish to leave a  
message.

or e-mail to [randcbutler@paradise.net.nz](mailto:randcbutler@paradise.net.nz)



# *Chapter 2*

## **Entering data**

| What's in this chapter? | Page |
|-------------------------|------|
| 2.1 Overview            | 2.1  |
| 2.2 Users               | 2.2  |
| 2.3 Tutors              | 2.4  |
| 2.4 Courses             | 2.6  |
| 2.5 Students            | 2.14 |

### **2.1 Overview**

There are four sets of data which you must enter to enable to you use this package. These are :

#### **Users**

You must specify the names and passwords of those people whom you wish to allow access to the package.

#### **Tutors**

Next you enter the names and details of those people who teach the courses offered by your centre.

#### **Courses**

Next you enter the courses, along with all their details, and, as you go, you connect them to the tutor (or tutors) who teach each course.

## Students

Finally, you enter your students, connecting each to his or her courses as you go.

You will notice that these buttons are in the reverse order along the top of the main screen. This is because, once you are up and running, the button which you will use most frequently is the first, 'Students', followed in decreasing order of frequency by 'Courses', 'Tutors', and 'Users'.

Let's take these in the order listed above.

## 2.2 Editing Users

The first thing that you should do, having entered the package for the first time, is to register yourself as a user, so that, in future, you can log on as yourself and have your own personal settings recognised.

Click on the 'Edit Users' button at the top of the main screen.



It will turn green and the User data entry screen will appear.

Community Education Worsfold Demonstration 20/03/2003 User : Worsfold Version date : 01/03/2003

Edit\_Students Edit\_Courses Edit\_Tutors **Edit\_Users** Print lists Utilities Exit Year 2003

This utility allows you to add or delete users from the database, and to adjust their password and/or rights to the various function of the package

Currently listed users

guest

User's Logon

Password

User rights

has the rights to

- View student details
- Edit students
- Edit courses
- Edit users
- Print lists
- All utilities
- Just view course sizes
- View only students

Add a new user

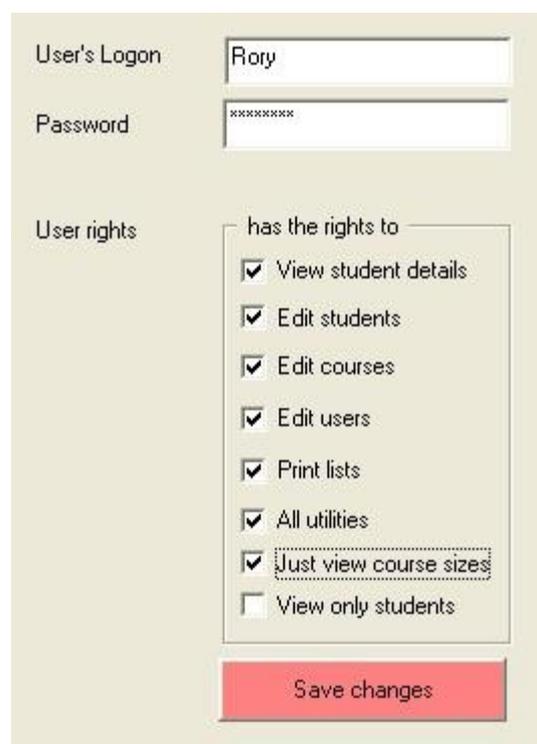
Delete the selected user

Save changes

Initially, only the user 'guest' will be listed. Click 'Add a new user', followed by the entry you wish to type when you log on, followed by the password which you wish to use to access Community Education.

A word or two concerning passwords : Books have been written concerning passwords. Your password should be a simple code which you will easily remember but that no-one else, knowing you, might be able to guess. Many folk use their mother's maiden name. Names of your children, your pets, your middle name, your wedding anniversary, your birthday etc are the first choice of those wishing to guess your password. Your choice should also involve both ends of the keyboard so that anyone watch cannot follow the movement of your hands.

Once you have these two details entered.....



User's Logon: Rory

Password: \*\*\*\*\*

User rights: has the rights to

- View student details
- Edit students
- Edit courses
- Edit users
- Print lists
- All utilities
- Just view course sizes
- View only students

Save changes

.. choose those access rights which you wish to allocate to yourself.

A useful right to allocate to an office member is the second to last : Just view course sizes. This will give them the ability to enter the package and, via the utilities area, view the list of courses, their current enrolment numbers, and their maximum sizes. This makes it possible to them to provide advice to prospective course members.

Once you have made your selection, click the red 'Save changes' button and your new user will be added to the list.

At this stage you might like to exit from the package and sign on as yourself. Please remember to change the password for user : guest to something other than 'worsfold'.

## 2.3 Edit Tutors

The second area to visit in preparing your package for use is the 'Editing tutors' area. Click on the 'Edit tutors' button at the top of the main screen and the following tutor data entry screen will appear.

Only two items of information are essential : The tutor's Family name and First name. All other details are optional. Some are obviously very useful and others you will wish to ignore.

This utility allows you to add or delete tutors from the database, and to adjust their individual details

Currently listed tutors

Find

|     |         |
|-----|---------|
| All | well    |
| All | h       |
| Be  | ennifer |
| Bo  | e       |
| Ch  | elle    |
| He  | ette    |
| Ho  | enne    |
| Ja  |         |
| Jo  |         |
| Ma  | el      |
| Ma  | sita    |
| Me  | len     |
| Na  |         |
| Pa  | e       |
| Qu  | nan     |
| Ra  | Aroha   |
| Si  | wati    |
| Te  | bia     |

Family name

First name

Title

Address line 1

Address line 2

Address line 3

Address line 4

Postal code

Home phone

Work phone

Fax number

Cell phone

Email

Comment

Pay scale

TEC Number

Bank Account

Status  Active  Inactive

Highest qualification

Tutor/Teaching qualifications

QA/PD

Date started

Date of birth

IRD Number

Tax code

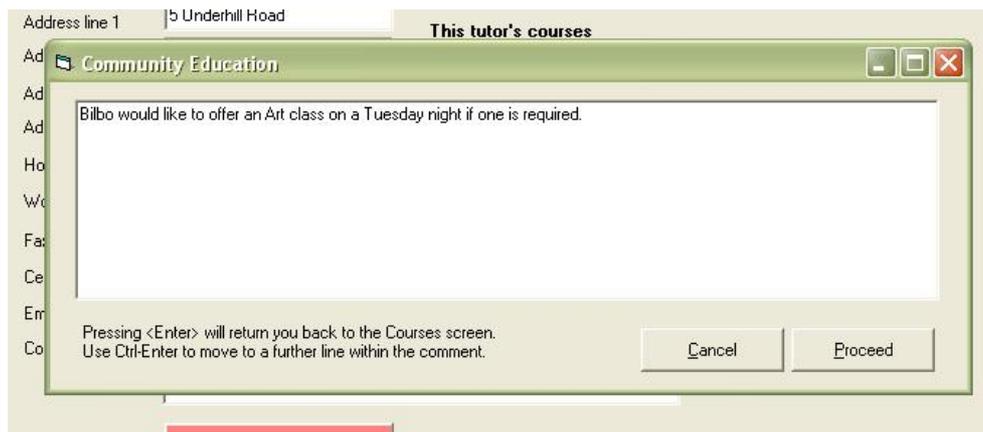
PPTA

**This tutor's courses**

(Courses are attached to tutors via editing the course details)

There are, initially, normally, of course, no 'currently listed tutors'. The first task is to add your first tutor. To do this, Click on the 'Add a new tutor' button and fill in the tutor's personal details in the center panel.

If you wish to enter a comment then just click in the comment area and a small popup window will appear, via which you can enter any comment.



An example of a completed data screen is shown below.

|   |  |  |  |            |   |
|---|--|--|--|------------|---|
| Family name                                 | <input type="text" value="Baggins"/>   | Pay scale  | <input type="text" value="2"/>   | IRD Number | <input type="text" value="16-635-111"/> |
| First name                                  | <input type="text" value="Bilbo"/>   | TEC Number   | <input type="text" value="123456"/>                                    | Tax code   | <input type="text" value="G"/>          |
| Title                                       | <input type="text" value="Mr"/>  | Bank Account   | <input type="text" value="02 2345 67891 00"/>                          | PPTA       | <input type="checkbox"/>                |
| Address line 1                              | <input type="text" value="5 Underhill Road"/>  | Status   | <input type="radio"/> Active <input checked="" type="radio"/> Inactive |            |   |
| Address line 2                              | <input type="text" value="Hobbiton"/>  | Highest qualification  | <input type="text" value="B SC"/>                                      |            |   |
| Address line 3                              | <input type="text" value="The Shire"/>   | Tutor/Teaching qualifications  | <input type="text" value="Dip Ed"/>                                    |            |   |
| Address line 4                              | <input type="text"/>   | QA/PD  | <input type="text"/>   |            |   |
| Postal code                                 | <input type="text"/>   | Date started   | <input type="text" value="03/06/2003"/>                                |            |   |
| Home phone                                  | <input type="text" value="06 345 6789"/>   | Date of birth  | <input type="text" value="19/12/1974"/>                                |            |   |
| Work phone                                  | <input type="text" value="06 357 6245"/>   | <b>This tutor's courses</b>  |  |            |   |
| Fax number                                  | <input type="text"/>   | <input type="text"/>   |  |            |   |
| Cell phone                                  | <input type="text" value="021 111 9999"/>  | <small>(Courses are attached to tutors via editing the course details)</small> |  |            |   |
| Email                                       | <input type="text" value="bilbo@underhill.net.nz"/> <input type="button" value="Send"/>        |  |  |            |   |
| Comment                                     | <input type="text" value="Bilbo is happy to run an Art class on Tuesday nights if required."/> |  |  |            |   |
| <input type="button" value="Save changes"/> |  |  |  |            |   |

Most of the entries will be obvious to you. The Pay scale can be any number. '0' can be used, for example, to signal those tutors who are paid via a different system - e.g. those who send you an invoice - rather than those whom you pay via time sheets or the like.

If you do not wish to enter particular details e.g. Bank Account then you are perfectly free to leave them blank. As explained above, only the Family Name and First name are essential.

Once you have finished the entry of the details, click on the red 'Save changes' button, which changes colour to red whenever you make a change, and your tutor will be added to the list on the left hand side.

A small 'Send' button next to the tutor's email address allows you to jump straight to your email program, to send a message to the displayed tutor.

To edit the details of a tutor, simply click on their name in the left hand list. Their details will be displayed and you can edit them, saving them once you have completed their changes.

Initially there will be no courses attached to a tutor. Once you have moved further in to the package, and have entered some courses, (and attached them to their tutors) then, returning to this screen and selecting a tutor will cause his or her courses to be listed on the right hand side of this screen.

Once you have your tutors in place, it is time to move on to the courses.

## 2.4 Editing courses

The third entry area is the specification of the courses which you offer.

This is access via the second large button at the top of the main screen - 'Edit Courses'

**Course details** Click column title to sort

Find

Display only these:

| Code | Title                               |
|------|-------------------------------------|
| M1   | Get The Best From Your Camera       |
| M2   | Landscape Design                    |
| M3   | Boatmasters                         |
| T1   | Defensive Driving                   |
| T2   | Indonesian Cooking                  |
| T3   | Academic Writing and Study Skills   |
| T4   | Learn To Speak Mandarin (Int)       |
| T5   | Swing Dancing                       |
| T6   | Stage 3 Guitar                      |
| T7   | Te Reo Me ona Tikanga               |
| T8   | Introduction to Maori Society       |
| T9   | IRD Business Tax Seminar            |
| T11  | Scrapbooking                        |
| T10  | Learn To Speak French Beginners     |
| W1   | Learn To Speak Mandarin (Beginners) |
| W2   | An Introduction to Beauty Therapy   |
| W3   | Tai Chi Chuan                       |
| W4   | Cake Decorating                     |
| W5   | Wednesday Pilates                   |
| W6   | Yoga                                |
| TH1  | Floral Art                          |
| TH2  | French Conversation (Int)           |

Code

Title

Subcode

Status  Active  Pending  Cancelled

Tutor 1  Hr/Wk  Day

Tutor 2  Hr/Wk  Time

Room  Max  Min  Current takers  Waiting list

Funded

Course Fee \$  Materials \$  Total

End date

Comment

Casual enrolments

Registers comment

Comment to appear in documents

**Changes alert!**

N.B. Please use the format dd/mm/yyyy for all dates

Start date

Term

Day

Hours

Weeks

Your courses are listed down the left hand side of the screen. Initially, of course, no courses are listed. To enter your first course, click on the 'Add a new course' button, and proceed to the details.

Note that some of the fields have small orange rectangles beside them. These are the essential fields and must be provided for every course. All other fields are optional.

**Code** : This is your own internal code by which the course is recognised. It can consist of a mixture of alphabetic and numeric characters eg : 50, 50a, 101C etc Codes can have a maximum length of 5 alpha-numeric. Where you have a particular course being repeated each term then it must have a separate entry for each term, and you might wish to include the term number as part of the code. E.g. WWK1, WWK2, WWK3 etc

**Title** : The title of your course

**Subcode** : You must categorise your course under own of the T.E.C.categories.

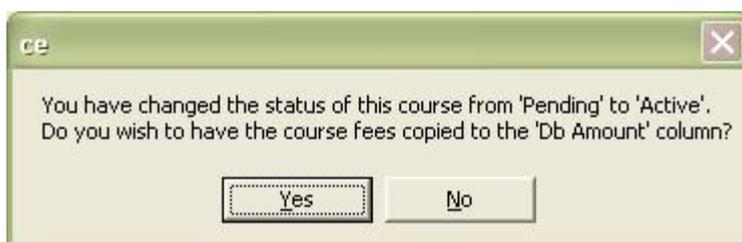
If you know the actual subcode for your course (e.g. 220) then you can simply type it directly into the data entry field provided. Otherwise, you can select it from the pull-down list of T.E.C. codes.

**Status** : Your course can be 'Active', 'Pending' or 'Cancelled'

If the status of a course is 'Pending' then you may enrol students in that course but the course fee will not appear in their 'Db amount' column, as shown below.

| Date       | C Code | Title  | Course | Materials | Total Fee | Db Amnt |
|------------|--------|--------|--------|-----------|-----------|---------|
| 05/03/2005 | S101   | ACCESS | 60.00  |           | 60.00     | 0.00    |

If, when numbers are suitable, you decide to change the course from 'Pending' to 'Active', the program will offer you the chance to automatically have the 'Db amount' column filled with the 'Total fee' for each student enrolled. The message in question is shown below.



**Tutor** : Select the tutor from the pull down list. You can specify up to two tutors per course, and you may also, if you so wish, specify their hours per week.

**Room** : ... where the course is held

---

**Maximum** : The maximum number of students allowed in the course.

**Funded** : There are four possibilities – three of which correspond to a page of your annual MOE returns.

A fourth possibility 'Other' has been added, for those who wish to offer courses which fall outside the MOE returns.



**Course fee** : The fee for the course.

If you wish to have a separate **materials fee** then that, too, can be entered at this point. Alternatively, some prefer to leave any materials cost as a part of the course fee, without separating it.

**Start date** : The date of which the first session of the course is held. Please use the format dd/mm/yyyy. If you enter, for example '2/5/5' the program will automatically reformat it for you to '02/05/2005'.

**End date** : The date of which the last session of the course is held.

**Term** : Select term 1, 2, 3 or 4 or All year

**Day** : The day of the week on which the course is held. You can add to the list of possibilities shown here via Utilities – which is dealt with in a later chapter.

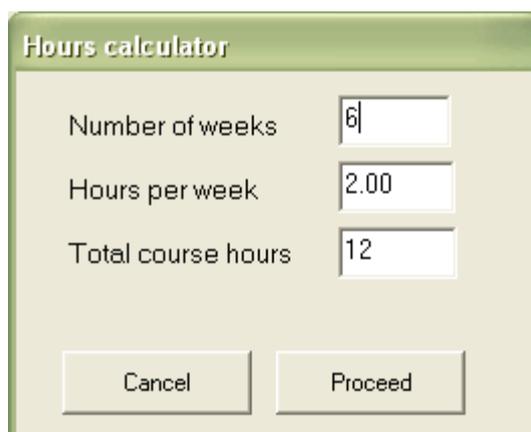
**Time** : Please indicate the start time on the day AND the finish time. You may set up your own times in order to save you the trouble of having to type them in each time. To do this, click on the small 'three dots' button to the right of the 'Time' data entry.

A display will appear via which you can enter a time, press <Enter>, enter another time, press <Enter> etc until the various times which you wish to use have all been entered. From there on it is simply a matter of selecting the relevant entry from the list each time. You can, of course, press the 'Three dots' button again at any stage to enter further times. An example of this entry screen is shown below.



**Hours** : This is the total number of hour which the course will occupy. This information is used for the T.E.C. returns.

**Weeks** : In order to specify the total number of hours (vital for the correct generation of the RS44 returns) you may click on the large vertical 'Three dots' button to the right of the data area. This causes a popup calculator to appear. An example of this is shown below.



The program will attempt to fill in the details for you but will, basically, calculate the total number of hours from the first two entries. Once you are satisfied that the information is correct, click 'Proceed' and the information will be displayed back on the main screen, as shown below.

|       |           |     |
|-------|-----------|-----|
| Time  | 7pm - 9pm | ... |
| Hours | 12        | [ ] |
| Weeks | 6         |     |

**Comment** : Any comment which you might wish to make concerning the course. (e.g. Requires an OHP) As with the entry of a tutor comment, clicking in the course comment area causes the popup window to appear.

### Comment to appear in documents

Should you wish to add a further comment, which is intended to appear along with the course details in documents designed to be sent to members of the course, then enter it at this point. e.g.

Community Education

Please bring your own wool to the first night and we will discuss the merits and defects of the various samples brought in.

Pressing <Enter> will return you back to the Courses screen.  
Use Ctrl-Enter to move to a further line within the comment.

Cancel Proceed

Once you have finished entering the details, click on the red 'Save changes' button and your course will appear in the left hand list.

You may subsequently make changes to your course details by returning to this screen, selecting the course from the left hand list, making your required changes, and clicking again on the 'Save changes' button.

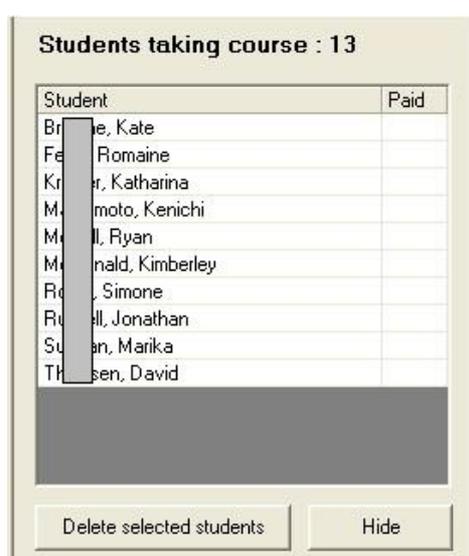
So far, you have used just two of the seven buttons at the bottom of the screen.

|                         |   |                     |
|-------------------------|---|---------------------|
| Display rooms timetable | Add a new course  | Save changes        |
| Changes alert! [ ]      | Add a new course Repeating details of the selected course | View students       |
|                         | Delete the selected course                                | Import 2003 courses |

If you wish to repeat the basic details of one course for another course then a) select the course which you wish to copy then b) click on the 'Add a new course repeating details of the selected course' button. Add the final details of your new course, and save the changes.

You may, of course, delete a particular course, by selecting it and clicking on the 'Delete the selected course' button.

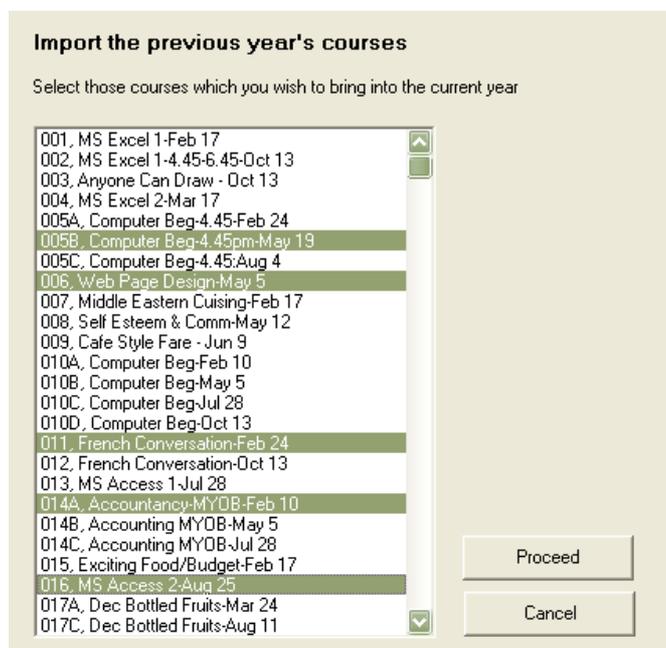
Should you wish to view those students attached to a particular course then a) select the course concerned and b) click on the 'View students' button. A popup window will appear, listing the students currently enrolled in the course.



From this screen you can select one or more students and delete their enrolments using the button provided. (To multi-select, hold down the Control key and click on the students whom you wish to select.)

Alternatively, once you have finished, click on the 'Hide' button to return to your normal 'Edit Courses' screen.

Should you have been running the program in a previous year then the sixth button allows you to import courses directly from the previous year's database. Click on the 'Import 200x courses' button and the previous year's courses will be displayed. In the example below, five courses have been selected for import.



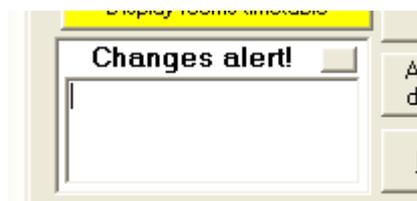
Click 'Proceed' and the selected courses will be added to the list for your current year. You can, of course, then alter particular details, e.g. the start and end dates, to reflect the correct information for the current year.

The yellow button allows you to view the room timetable for the period of the selected course. This enables you to see which rooms are available for use during this period. An example is shown below.

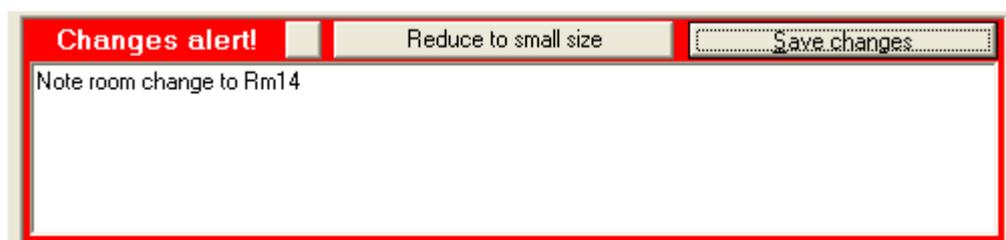
| Room       | 09/05/2005 |           |           |           |           |           |           |           | 16/05/2005 |           |           |
|------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|-----------|-----------|
|            | 7-7.15     | 7.15-7.30 | 7.30-7.45 | 7.45-8.00 | 8.00-8.15 | 8.15-8.30 | 8.30-8.45 | 8.45-9.00 | 7-7.15     | 7.15-7.30 | 7.30-7.45 |
| 11         |            |           |           |           |           |           |           |           |            |           |           |
| 15         | M245       | M245      | M245      | M245      | M245      | M245      | M245      | M245      | M245       | M245      | M245      |
| 16         |            |           |           |           |           |           |           |           |            |           |           |
| 19         |            |           |           |           |           |           |           |           |            |           |           |
| 20         |            |           |           |           |           |           |           |           |            |           |           |
| 44         |            |           |           |           |           |           |           |           |            |           |           |
| 45         | M236       | M236      | M236      | M236      | M236      | M236      | M236      | M236      | M236       | M236      | M236      |
| 46         |            |           |           |           |           |           |           |           |            |           |           |
| 47         |            |           |           |           |           |           |           |           |            |           |           |
| 47A        |            |           |           |           |           |           |           |           |            |           |           |
| 48         | M274       | M274      | M274      | M274      | M274      | M274      | M274      | M274      | M274       | M274      | M274      |
| 5          |            |           |           |           |           |           |           |           |            |           |           |
| 50         |            |           |           |           |           |           |           |           |            |           |           |
| 6          |            |           |           |           |           |           |           |           |            |           |           |
| 9          |            |           |           |           |           |           |           |           |            |           |           |
| A/V Suite  |            |           |           |           |           |           |           |           |            |           |           |
| J'ville    |            |           |           |           |           |           |           |           |            |           |           |
| Library    |            |           |           |           |           |           |           |           |            |           |           |
| Music      | M282       | M282      | M282      | M282      | M283      | M283      | M283      | M283      | M282       | M282      | M282      |
| Rec Centre |            |           |           |           |           |           |           |           |            |           |           |

Below the yellow 'Rooms timetable' button is a small text area where you may add any note that you wish to use to draw attention to a change in the course details – e.g. a change of dates or room. If you enter text in this box then the window surrounding it and its size will change subtly, as shown below.

Without an entry :



With an entry :



When you wish to remove this reminder/warning, just click in the small unlabelled button at the right hand end of the heading, shown above. To reduce the size back to the small size (so that you can access the buttons behind) click on the button suitably labelled.

If you wish to save changes to the course details without reducing the notes window to its original size then click on the other button on the notes window labelled 'Save changes'. If you display a course which has no notes then the notes window will automatically be in its small size.

In the middle of the screen are two small lemon windows which show

- a) the number of students currently enrolled in the displayed course.
- b) The number of students currently on the waiting list for this course.

|                   |                 |
|-------------------|-----------------|
| Current<br>takers | Waiting<br>list |
| 5                 | 2               |

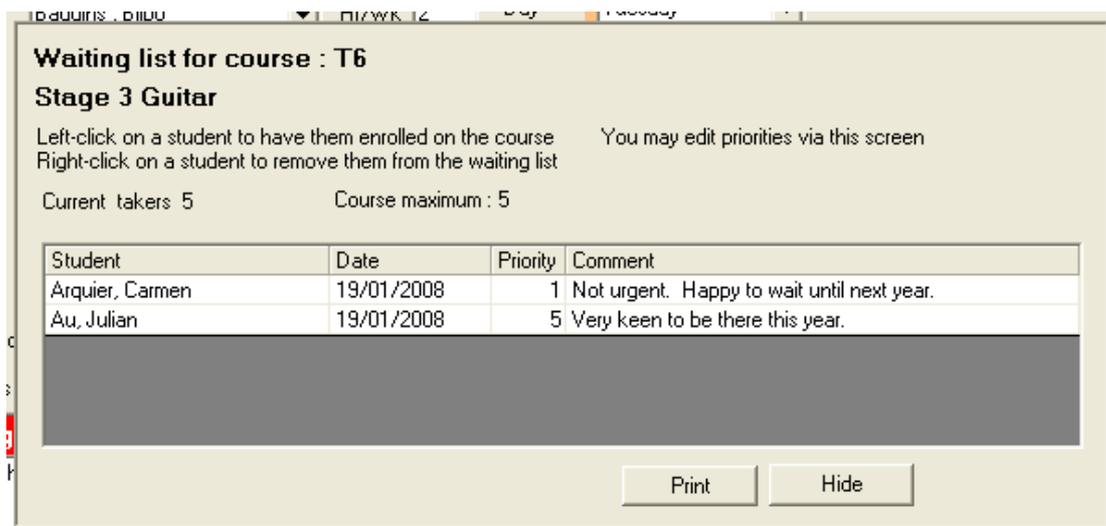
You can view the students currently taking the course

If a course has been cancelled then a red message appears at the top of the screen to draw your attention to this fact.

You can view the students taking this course either by clicking on the button labelled 'view takers' as described earlier, or by clicking on the left hand of the yellow labels.

You can similarly view the students on the waiting list by clicking on the 'Waiting list'

label. The following is an example of the screen which will appear.



You can add a student from the waiting list by simply clicking on their name from the list displayed. To remove a student from the waiting list right-click on their name. You may also edit the waiting list priorities by clicking on a priority and changing it.

You can also print a list of those on the waiting list (e.g. to hand to the tutor) by using the 'Print' button at the bottom of the window.

The final button, 'Hide', returns you to the main course screen.

If a course has been cancelled then a suitably bright message appears at the top of the course display.



Casual enrolments.

The need for this entry arose from a centre which ran a one-day course (a public

lecture) open to the public for enrolments on the day. Of course 150 people attended and they did NOT wish to gather their names, their ages and their ethnicities... or to spend a couple of hours typing all of this information in to the computer!

The solution was to develop the are labelled 'casual enrolments'. If you click on the area then the following small window will appear.

This completes our discussion (we'll, I'm talking to myself as I type and I trust that you are doing the same as you read) of course detail entry. We'll turn our attention to the last major area of data entry : students.

**Casual enrolments for : T6**

Total number of enrolments

Total fees paid

Total hours attended

**Gender and Ethnicity numbers**

| Eth/Gender     | Males | Females | Unknown |
|----------------|-------|---------|---------|
| NZ Maori       |       |         |         |
| NZ Pacific Isl |       |         |         |
| NZ Asian       |       |         |         |
| Others         |       |         | 0       |

N.B. This information is used in the compilation of the RS44 returns - hence the need for information relating to gender and ethnicity. For the purposes of the returns the Age Group will be 'Unspecified' for these students. Separate information relating to 'European' students is not required for the returns.

OK

The orange label displays important information, explaining the need ofr gender and ethnicity information for the purposes of the RS44 returns. As you enter a total attended, this will automatically appear in the 'Unknown Others' area in the bottom right hand corner of the display. If you do, however, know the numbers in particular squares (e.g. Six male Maori) then fill this in and the balance in the bottom right hand coner will be reduced accordingly.

Fill in the total fees paid and the total hours attended (e.g. 150 people for 2 hours = 300 hours) and your task is complete.

Casual enrolments will appear on the list of takers as a single entry.

## 2.5 Editing students

Finally, we come to where we can enter a student! Click on the 'Edit Students' button at the top of the screen and the student data entry screen will be displayed.

The screen is in two parts. At the top are the personal details relating to the displayed student. At the bottom are the details relating to the student's enrolments, including financial information. N.B. In the example below, the 'Detailed financial system' details are shown.

To begin, click on the 'Add a new student' button.

The screenshot displays a web-based form for entering student data. The form is divided into two main sections: personal details and enrolment information.

**Personal Details Section:**

- Family name:
- First names:
- Address line 1:
- Address line 2:
- Address line 3:
- Address line 4:
- Post Code:
- Home phone:
- Work phone:
- Fax number:
- Cell phone:
- Email:
- Gender:  Male  Female  Unkn
- Mailing list:
- NZ Resident?:  Yes  No
- Date of birth:
- Age group:
- Ethnicity:
- Title:
- Credit card:
- Previous courses:
- Total debits:  Total credits:

**Enrolment Information Section:**

A table with columns: Date, C Code, Title, Course, Materials, Total Fee, Db Amnt, Cr Amnt, Rcpt/Inv, Prnt?, Method, hours, Comment.

Below the table are buttons: , , , , , , , , , ,

Let's look at the personal details first.

Four of these are essential – the four with small orange rectangles to their left.

This close-up view of the personal details form highlights four essential fields with small orange rectangles to their left:

- Family name
- First names
- Address line 2
- Address line 3

Most of these are self explanatory.

The little buttons at the right hand end of Address lines two and three allow you to specify so default entries, one of which may then be selected from the popup list associated with each of those fields. The entry of the pre-determined possibilities is shown below.

Type each new entry into the text entry box at the bottom of the screen and press <Enter>. When you have finished, click 'Finished'.



Subsequently, the entries will be available as shown below.



Mailing list : Tick this box if you wish to be able to print address labels for just the 'mailing list' students.

Age Group : At the request of one centre we've added a category outside the range covered by the T.E.C. 'Under 16' allows them to identify younger students optionally excluded from the Ministry returns.

Title : .. has been added at the end as some centres prefer not to record this item.

Credit card : One or more centres has requested the addition of this field. Use it if you do wish to record this information, otherwise ignore it.

Previous courses : This field displays the number of courses which the student in question has taken in previous years (according to previous years' databases – which you may or may not have available, depending on when you began using this package). You can view the courses by clicking on the button labelled 'View courses'.

(If the number of previous courses is zero and you know that there are previous courses then you can have the count globally redetermined by going to 'Utilities / Course size / Recount previous courses' as described in the chapter on Utilities.)

At the bottom of the personal details area is a comment area where you may record any other information relevant to this student.

Once you have entered your student's details it is time to move to the bottom half of the screen to record their enrolments. Before you can do this for a new student you must 'Save changes'. Student's enrolments are recorded using the student's record number (where they are stored in the database) and, until you have 'Saved' them, they do not have such a number.

There are two ways in which you can enter a course against a student, and each centre will have its preferred method.



1. Click on the purple panel labelled '>>> COURSES >>>' and a panel will slide out, displaying a list of your courses. An example of this list is shown in more detail below.

Click col heading to sort All cour ▾ Ct.

| Code | Title              | Max | Curr | WtLst |
|------|--------------------|-----|------|-------|
| M1   | Get The Best Fro   | 0   | 0    | 0     |
| M2   | Landscape Desig    | 30  | 0    | 0     |
| M3   | Boatmasters        | 20  | 0    | 0     |
| T1   | Defensive Driving  | 20  | 0    | 0     |
| T10  | Learn To Speak F   | 12  | 0    | 0     |
| T11  | Scrapbooking       | 12  | 0    | 0     |
| T2   | Indonesian Cooki   | 15  | 0    | 0     |
| T3   | Academic Writing   | 15  | 0    | 0     |
| T4   | Learn to Speak M   | 15  | 0    | 0     |
| T5   | Swing Dancing      | 20  | 0    | 0     |
| T6   | Stage 3 Guitar     | 5   | 5    | 3     |
| T7   | Te Reo Me ona T    | 12  | 1    | 0     |
| T8   | Introduction to Ma | 12  | 0    | 0     |
| T9   | IRD Business Tax   | 14  | 0    | 0     |
| TH1  | Floral Art         | 12  | 0    | 0     |
| TH2  | French Conversat   | 12  | 0    | 0     |

This display shows both the code and the title of each course, along with both the maximum number of students allowed in the course and the current number of enrolments.

To enrol a student in a course simply click on the required course from the displayed list. Should you attempt to exceed the maximum then a message box will seek approval do to so. If approved then the display of the number will have a red background, constantly warning you that the maximum has been exceeded. The 'Current' number is, of course, updated as you add each new student to a particular course. You can view the students currently taking a particular course by clicking on the number in the 'Curnt' column.

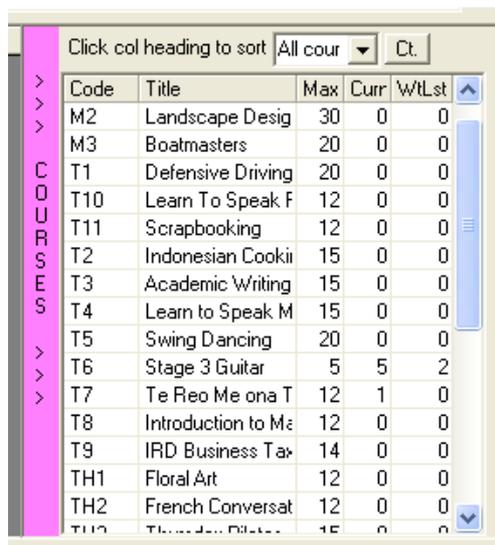
### **Recounting the students attached to courses.**

If you are entering enrolments across more than one terminals then it is necessary for each terminal, from time to time, to be brought up to date with the numbers taking each course. It would be too time consuming for the program to automatically update the display on every terminal everytime a new enrolment is made on one of them. At the top of the above display there is a small button labelled 'Ct.' Clicking this button will cause the course count for every course to be re-determined from the database.

### **The Waiting List facility**

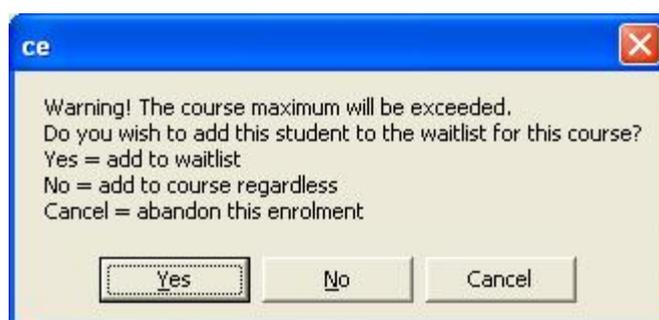
The program has the ability to keep a 'waiting list' of students waiting to gain admission to a course. This optional facility is 'switched on' via 'Utilities and Configuration / Default settings / More defaults'.

If you are using the 'Waiting list' facility then an extra column will appear in this display, as shown below...



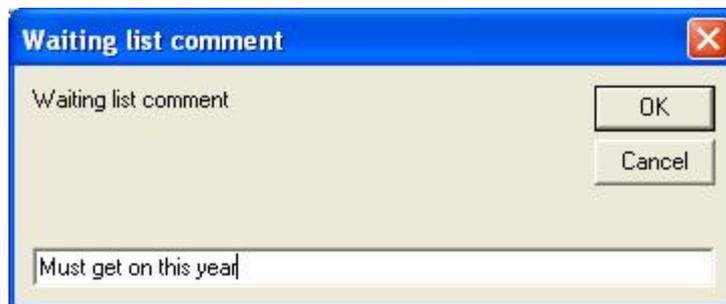
| Code | Title              | Max | Curr | WtLst |
|------|--------------------|-----|------|-------|
| M2   | Landscape Desig    | 30  | 0    | 0     |
| M3   | Boatmasters        | 20  | 0    | 0     |
| T1   | Defensive Driving  | 20  | 0    | 0     |
| T10  | Learn To Speak F   | 12  | 0    | 0     |
| T11  | Scrapbooking       | 12  | 0    | 0     |
| T2   | Indonesian Cooki   | 15  | 0    | 0     |
| T3   | Academic Writing   | 15  | 0    | 0     |
| T4   | Learn to Speak M   | 15  | 0    | 0     |
| T5   | Swing Dancing      | 20  | 0    | 0     |
| T6   | Stage 3 Guitar     | 5   | 5    | 2     |
| T7   | Te Reo Me ona T    | 12  | 1    | 0     |
| T8   | Introduction to Ma | 12  | 0    | 0     |
| T9   | IRD Business Tax   | 14  | 0    | 0     |
| TH1  | Floral Art         | 12  | 0    | 0     |
| TH2  | French Conversat   | 12  | 0    | 0     |
| TH3  | Therapy Pilates    | 15  | 0    | 0     |

... and, should you attempt to allocate a course which is on its maximum to a student then the message box will allow you to either proceed (and exceed the maximum) or to add the student to the waiting list. An example of this screen is :



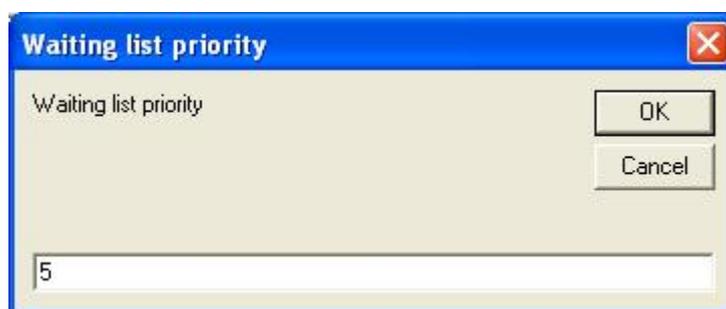
If you respond 'Yes' then two further questions will be asked :

- a) You can provide a comment e.g.



A dialog box titled "Waiting list comment" with a close button (X) in the top right corner. It contains a text input field with the text "Must get on this year" and two buttons: "OK" and "Cancel".

And you can enter a priority number. (You use your own range, be it 1 to 5, or 1 to 10.... And 1 may be the highest or the lowest priority. It over to you.)



A dialog box titled "Waiting list priority" with a close button (X) in the top right corner. It contains a text input field with the number "5" and two buttons: "OK" and "Cancel".

If you have students on the waiting list then you can view them by clicking on the number in the waiting list column. The list will be displayed e.g.

**Waiting list for course : T6**  
**Stage 3 Guitar**

| Student         | Date       | Priority | Comment                                    |
|-----------------|------------|----------|--|
| Arquier, Carmen | 19/01/2008 | 1        | Not urgent. Happy to wait until next year. |
| Au, Julian      | 19/01/2008 | 5        | Very keen to be there this year.           |
| Adams, Rebecca  | 19/01/2008 | 3        | Must get on this year                      |

Right-click on student to remove from waiting list  
You may edit the priorities via this screen

Print Hide

You may, via this screen, alter the priority entries and/or remove a student from the waiting list by following the instructions on the screen.

Returning to the course selector, at the top of this window is a popup list which allows you to request that only courses for a particular term be displayed in the list.

To select a course from the list, just click on it and its details will be added to the student's display, as shown below.

| Date       | C Code | Title             | Course | Materials | Total Fee | Db Amnt | Cr Amnt | Rcpt/Inv | Prr |
|------------|--------|-------------------|--------|-----------|-----------|---------|---------|----------|-----|
| 26/02/2005 | M173   | ART FOR BEGINNERS | 45.00  |           | 45.00     | 45.00   |         |          |     |

| Code | Title          | Max | Currt |
|------|----------------|-----|-------|
| M136 | WOODWORK       | 12  | 3     |
| M145 | ITALIAN FOR TR | 20  | 16    |
| M152 | ESOL           | 30  |       |
| M167 | YOGA           | 20  | 14    |
| M173 | ART FOR BEGIN  | 12  | 5     |
| M182 | CLASSICAL GUIT | 6   | 1     |
| M183 | CLASSICAL ENSI | 6   | 3     |
| M184 | CLASSICAL GUIT | 6   | 1     |

The display above shows a course added to the detailed financial system display. In the simple financial system the courses in which the student is enrolled are displayed in a similar (but simpler) fashion.

2. The fastest way to add enrolments is simply to type in the course code into the small data entry field at the left hand side.

| Courses                                  |        |
|--|--------|
| m283                                     | Date   |
|  | 26/02/ |
| Type course code above and press <Enter> |        |

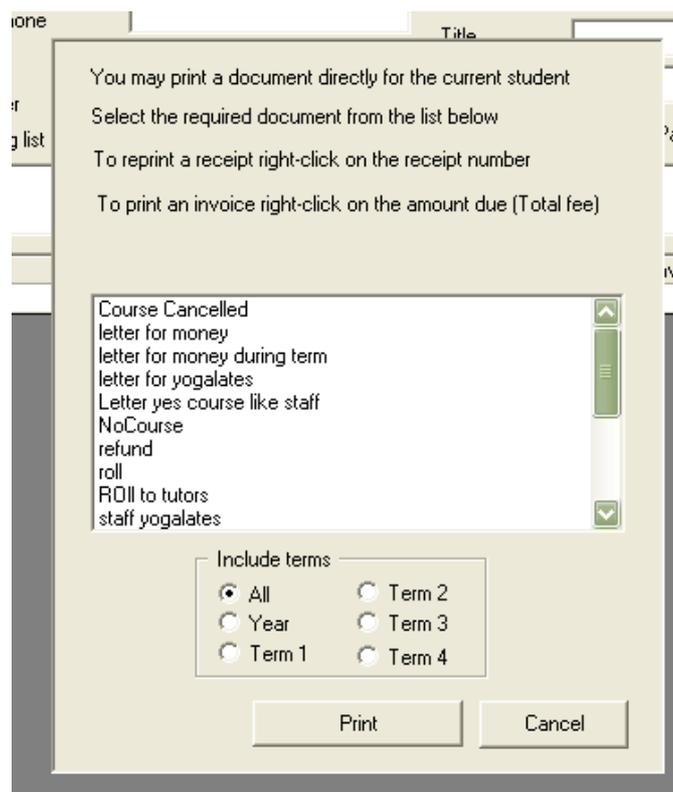
In the example above, course code M283 is about to be added. Press the 'Enter' key when you have typed your code, and the course will be added to the student and the cursor will return to the same place to allow you to enter a further course code.

Once you have completed the entry of data for a student, click on the 'Save changes' button and the information will be recorded in the database.

We shall deal with the various processes associated with the financial aspects in a separate chapter later in this manual. In the meantime, let's look at the other features of the student screen.

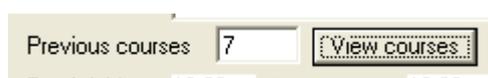
## Printing documents.

On the left hand side of the screen, just below the code entry box, is a small button labelled 'Print'. As you will see later in this manual, it is possible to design documents based on a generic student and to then print the document for one or more students. This button allows you to print such documents directly from the student's screen. Click on the button and a list of the documents which you have designed will be displayed.

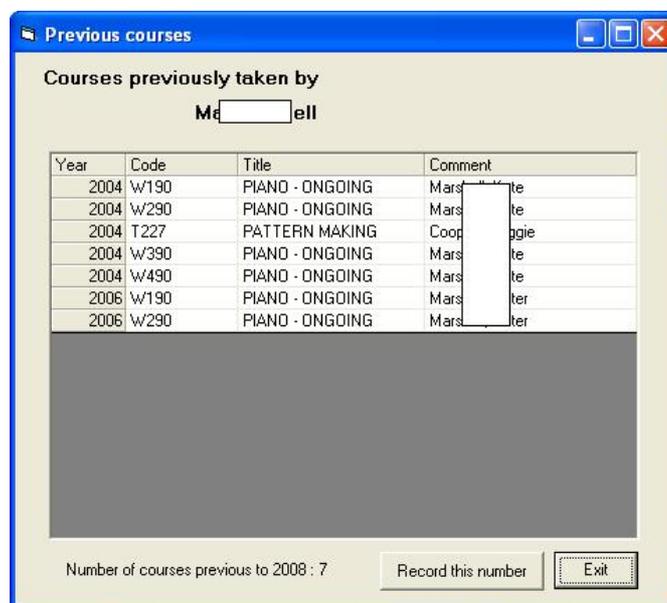


To print a document select it from the list and click 'Print'. Note the information at the top of this window, indicating that, if you are using the detailed financial system, you may print receipts and invoices by clicking suitably on the course listing for the student. Statements may be printed via this window, along with any other non-financial documents.

Also on the right hand side of the screen is a display of the number of previous courses taken by a student. These are courses taken by the student in previous years.



Clicking on the 'View courses' button results in a display such as :



The display indicates the year in which each course was taken, the course code, its title and the course tutor.

### Tagged students

There is a small tick box on each student's screen labelled 'Tag for list'. If you click on this box and save the changes then this student will be 'tagged'. Tagged students can be identified in two places in the package.

- Via the search process as described shortly.
- In the routine used to print statements, described in the chapter on 'Utilities / Configuration'.

Just below the credit card details area are two small areas reporting the total debits and total credits for the current student.

|              |         |               |         |
|--------------|---------|---------------|---------|
| Total debits | \$35.00 | Total credits | \$35.00 |
|--------------|---------|---------------|---------|

At the bottom of the screen there are some buttons. (There is actually one other in the gap – but this one is not currently visible for this student. It will be revealed and dealt with in the chapter dealing with the financial aspects of the package.



If a student has one or more cancelled courses (in the detailed financial system) then the first button causes these to be hidden. Once clicked, this button changes its caption to allow you to reverse the process.



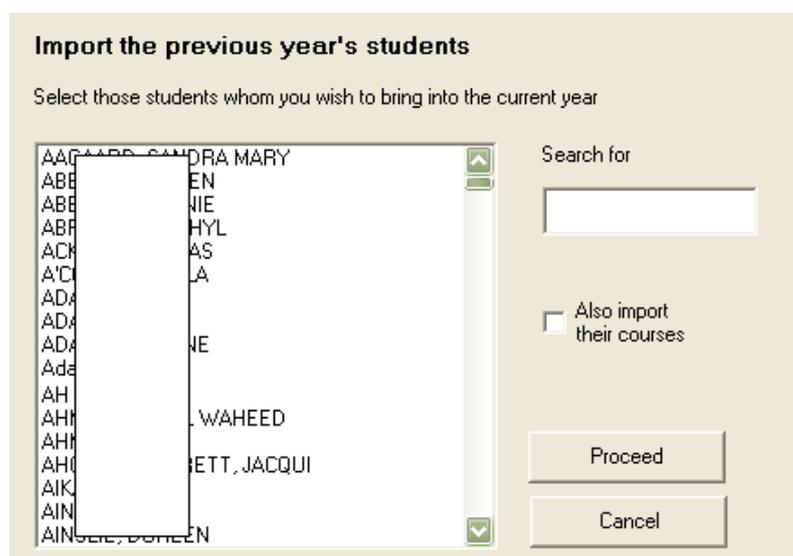
The next three buttons (in the bottom row) are have obvious purposes :

- To add a new student
- To delete the currently displayed student
- To save the changes made to the current student

The first button ('Add a new student') has a further small button labelled 'S' beside it. If you wish to add a new student who is a sibling of the currently displayed student then click on the 'S' button. Some of the details of the current student will be retained, leaving you to fill in the sibling's distinguishing details. If the new student is NOT a sibling then click the larger 'Add a new student' button.

This last button ('Save changes') will change its colour to red if any detail relating to this student is changed. It will revert to its usual colour once the changes have been saved (by clicking it).

The last button in the top row has the same purpose as its equivalent on the tutor's screen and the course's screen – to allow you to import students from the preceding year's database. An example of this screen is shown below.



You can use the 'Search for' area to find particular students and, by clicking the small box, you can have any courses attached to them included in the import.

The remaining two buttons relate to the financial process and will be dealt with in the relevant later chapter.

### **Moving to another student.**

Each time you enter this section of the program, the screen will automatically display the first student (alphabetically) on file. To move to a different student you can use the '< Back' and 'Next >' buttons in the bottom right hand corner of the screen. Alternatively you can click on the 'Search' button (Pressing Alt-S is a far quicker way of arriving at the same point). The following small window appears.

You will notice that there are six different things you can search for to identify students. The first is their family name. Simply type in the first few characters of the family name of the student sought, and all students matching these letters will be listed. To move to a particular student either click on their name, so simply type the number which corresponds to them in the list. The list will disappear and the selected student will be displayed.

A screenshot of a search dialog box. On the left, there is a vertical list of search criteria: 'Name sought', 'Receipt sought', 'Tagged students', 'Address', 'Email', and 'Post code'. The 'Name sought' option is selected with a radio button. To the right of this list is a text input field. Below the list is a large empty rectangular area. At the bottom of the dialog are two buttons: 'Clear all tags' and 'Cancel'.

Should you wish to search on one of the other criteria, type in the text sought and click on the 'Search' button which will then be visible. In the example below A search has been made for '@para' as a part of an email address.

A screenshot of the same search dialog box, but with the 'Email' option selected. The text input field now contains '@para'. A 'Search' button has appeared to the right of the input field. Below the large empty area, a list of search results is displayed. The list has two columns: a partial list of names on the left and a list of email addresses on the right. The email addresses all end with '@paradise.net.nz'. At the bottom, the 'Clear all tags' and 'Cancel' buttons are still present.

| Name | Email                    |
|------|--------------------------|
| Ab   | ll@paradise.net.nz       |
| An   | adise.et.nz              |
| An   | paradise.net.nz          |
| Arr  | rmstrong@paradise.net.nz |
| Ba   | ncoisb@paradise.net.nz   |
| Ba   | @paradise.net.nz         |
| Ba   | @paradise.net.nz         |
| Ba   | nz@paradise.net.nz       |
| Be   | ndivor@paradise.net.nz   |
| Be   | ennie@paradise.net.nz    |
| Blu  | umhardt@paradise.net.nz  |
| Bri  | b@paradise.net.nz        |
| Bro  | ke@paradise.net.nz       |
| Bul  | dandrea@paradise.net.nz  |

This is one of the two places in the package where 'tagged' students can be identified. 'Tagged students' are those whose 'tag for list' tickbox has been ticked.

The third filter option above allows you to identify these students. (A button at the bottom of the screen allows you to untick all tagged students.)

If you DO search for tagged students then, on the completion of the search you will be returned to the students' screen – with the first tagged student displayed. The 'Next' and 'Back' buttons will be outlined in red, indicating that they are restricted to less than all students – in this case just tagged students. You can 'escape' from this restriction by running another search.

This completes the discussion on data entry. Next we shall move to the printing of lists (both pre-designed and user-designed) and documents.

# *Chapter 3*

## **Printing**

| What's in this chapter?                        | Page |
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| 3.2 Printing Course lists (of students)        | 3.2  |
| 3.3 Printing lists of courses                  | 3.14 |
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### **3.1 Overview**

This section of the package is the largest, as there are many ways you can print the many lists available.

In addition to a large number of pre-designed lists, you can also design both your own lists and word processor documents. The main list printing screen has several buttons, each of which takes you to one of the various types of lists.



### 3.2 Printing Course lists (of students)

This is the process you can use to print a wide variety of lists displaying the students who are enrolled in courses.

On first entry, the screen will appear as shown below.

**Course lists**

Select required courses

Display: Just Monday courses

Display: All terms

Display:  All  Only active

| Code | Title (Click to sort)          |
|------|--------------------------------|
| 4210 | Portraiture                    |
| 6000 | Brochure request               |
| 1402 | Belly Dancing-Beyond Beginne   |
| 1150 | ESDL - Elementary              |
| 1151 | ESDL - Intermediate            |
| 3116 | Exports and Imports-Opportunit |
| 3123 | Microsoft Word - Stage 2       |
| 3141 | Belly Dance                    |
| 3150 | ESDL - Elementary              |
| 3151 | ESDL - Intermediate            |
| 3156 | Landscape Design               |
| 3160 | French Beginners               |
| 4116 | Exports and Imports-Opportunit |
| 4122 | Microsoft Word - Stage 1       |
| 4123 | Microsoft Word - Stage 2       |
| 4126 | Microsoft Publisher            |
| 4141 | Belly Dance                    |

List format

Name only  Address labels

Name and address  Receipt and name

Full details  One page register (A)

Financial details  One page register (B)

All details (including address and financial)

Sub format

No extra columns

Multiple columns

Row height: 240  
(Register spacing = 240)

Select all Generate lists Print to file

Your lists are displayed down the left hand side of these screen, and the courses listed for printing depend on the settings of the three choices above.

1. You can select a particular day of the week on which courses occur.

Select required courses

Display: Just Monday courses

Display: All courses

Display: Just Monday courses

Display: Just Tuesday courses

Display: Just Wednesday courses

Display: Just Thursday courses

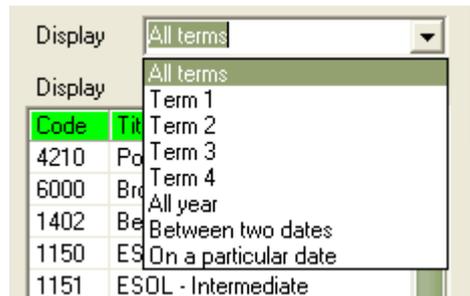
Display: Just Friday courses

Display: Just Saturday courses

Display: Just Sunday courses

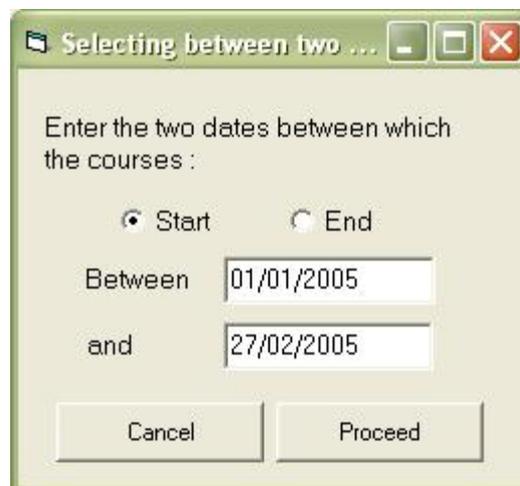
| Code | Title                        |
|------|------------------------------|
| 4210 | Portraiture                  |
| 6000 | Brochure request             |
| 1402 | Belly Dancing-Beyond Beginne |

2. You can select a particular term.

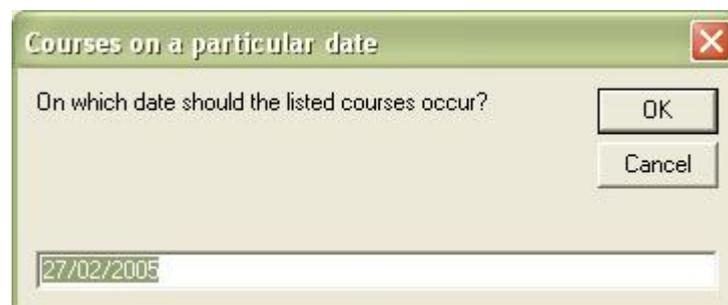


This option includes the ability to request any particular term or :

Between two dates – in which case the following popup dialogue will appear.



On a particular date – in which case the following popup dialogue will appear.



3. The final choice is to display either all courses (which meet the previous criteria) or only those the status of which are currently active.

---

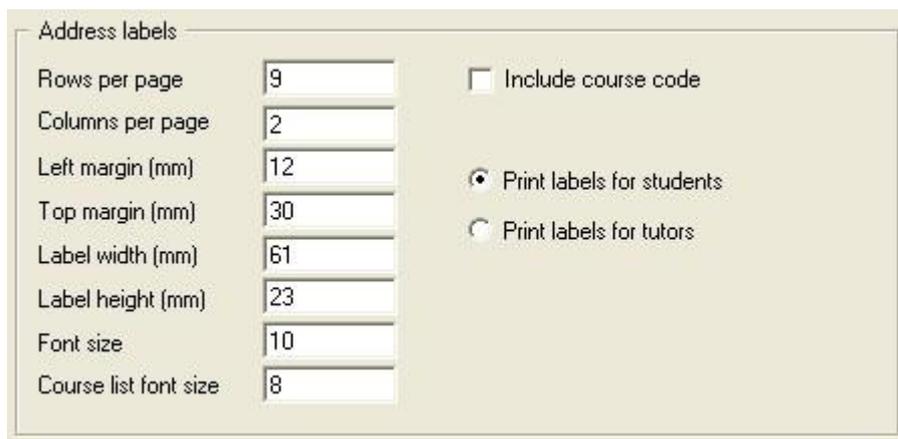
Whatever your selection, once you have made it, only the courses which meet your selection criteria will be displayed on the list.

Once displayed you may select one or more of the visible courses for printing.

You can see, at the top of the screen, that there are nine basic list types :

- Name only
- Name and address
- Full details
- Financial details
- All details
- Address labels
- Receipt and name
- Register A
- Register B

Some of these selections result in different printing options. If, for example, you elect to print address labels, then the following extra options will appear.



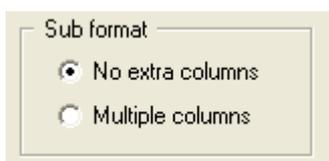
| Address labels        |  |
|-----------------------|--|
| Rows per page         | 9  |
| Columns per page      | 2  |
| Left margin (mm)      | 12   |
| Top margin (mm)       | 30   |
| Label width (mm)      | 61   |
| Label height (mm)     | 23   |
| Font size             | 10   |
| Course list font size | 8  |
|                       | <input type="checkbox"/> Include course code               |
|                       | <input checked="" type="radio"/> Print labels for students |
|                       | <input type="radio"/> Print labels for tutors              |

You can adjust these settings (which will be remembered for you) to reflect the size and shape of your labels.

To test these settings, print a sample to plain paper then hold it up against a sheet of labels to determine whether or not you have the correct settings.

It has been found that label width and height settings (which can be obtained by measuring your labels) need to be set a little smaller than the actual values. Once you are satisfied with your settings proceed to print on to sheets of labels. Your settings will be memorised and redisplayed the next time you enter this area.

Similarly, if you elect to print 'Name only' or 'Name and receipt' then the following frame will appear.

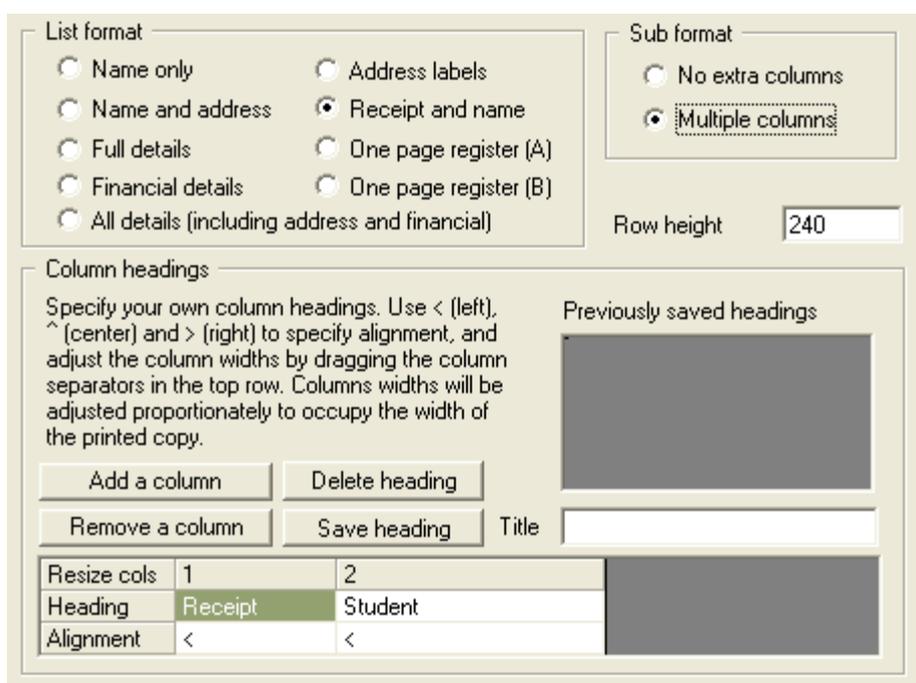


Sub format

No extra columns

Multiple columns

If you then select 'Multiple columns' from the Sub format, then a dialogue appears which allows you to set up your own range of column headings and to give your design a name so that you can easily retrieve it for later reprinting. You can, using this process, generate you own roll printout (although, once you've tried the 'Register' printouts you'll decide against designing your own). (For a roll, set up several columns each headed with the date of a session.)



List format

Name only       Address labels

Name and address       Receipt and name

Full details       One page register (A)

Financial details       One page register (B)

All details (including address and financial)

Sub format

No extra columns

Multiple columns

Row height

Column headings

Specify your own column headings. Use < (left), ^ (center) and > (right) to specify alignment, and adjust the column widths by dragging the column separators in the top row. Columns widths will be adjusted proportionately to occupy the width of the printed copy.

Previously saved headings

Add a column      Delete heading

Remove a column      Save heading      Title

|             |         |         |  |
|-------------|---------|---------|--|
| Resize cols | 1       | 2       |  |
| Heading     | Receipt | Student |  |
| Alignment   | <       | <       |  |

Initially the screen will appear as shown above. In the example below, two new columns have been added, labelled 'First day' and 'Paid', and the list has been given a name : 'First attendance' and has been saved. You can create a range of designs of your own and easily re-select one for later reprinting.

Column headings

Specify your own column headings. Use < (left), ^ (center) and > (right) to specify alignment, and adjust the column widths by dragging the column separators in the top row. Columns widths will be adjusted proportionately to occupy the width of the printed copy.

Previously saved headings

First attendance

Add a column    Delete heading

Remove a column    Save heading    Title    First attendance

| Resize cols | 1       | 2       | 3          | 4    |
|-------------|---------|---------|------------|------|
| Heading     | Receipt | Student | First date | Paid |
| Alignment   | <       | <       | <          | <    |

Note the 'Alignment' property which can be < (causes the column contents to be left aligned), ^ (centre aligned) and > (right aligned).

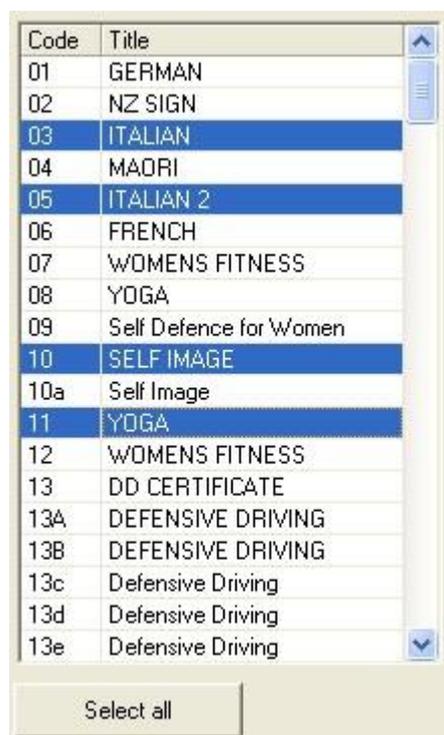
The only other detail prior to printing is the small display on the right hand side.

Row height    240

(Register spacing = 240)

By changing the number here you can alter the row height of your resulting list. A note indicates that the most common spacing is a setting of 240 which corresponds to most registers.

Before you can print your lists you must select the courses for which you wish to print. This is done on the left hand side of the screen, holding down the Ctrl key while you make multiple selections from the list of courses.



Finally, with all of your choices made, click on the 'Generate lists'; button, and the following dialogue will appear. In the majority of cases you need only click 'OK' on this screen, unless you really wish to make some further changes.

For your convenience there is a 'Select all' button.

There are two buttons left to discuss.

If you select the format 'Name only' then a button labelled 'Save to file' will appear. If you click this then the course lists will be printed in the usual way, as described below, but a message will appear along the way indicating that ...

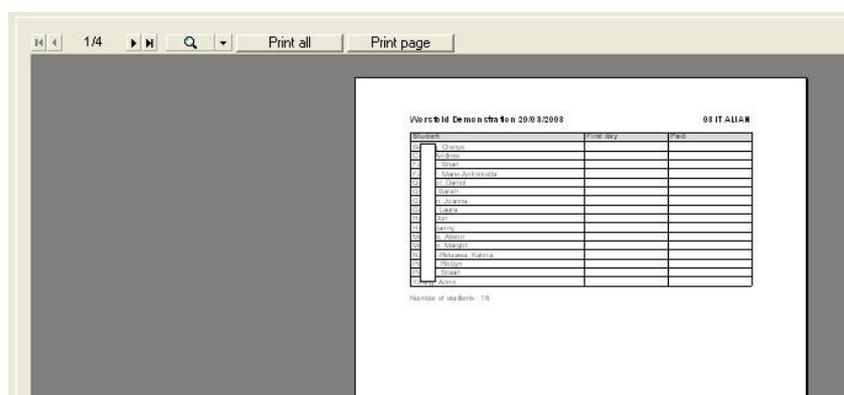


The resulting file is simply a text list of the course titles and the members of the courses. An example is shown below.



Now your lists will be generated and the screen will display their previews as shown below.

This first of your lists is displayed. The top of the following screen shot shows that this is list 1 or 4. Two buttons allow you to print either all pages or just the currently displayed page. A small magnifying glass allows you to adjust the 'zoom factor' of your display. It is far quicker however just to double-click on the displayed list. It will automatically enlarge. Repeated double-clicking repeatedly enlarges the display. You can also hold down your left mouse button on the display and drag it around the screen. Then too you can double-right-click to reduce the 'zoom factor' - the size of the display.



An enlarged list is shown below.

N.B. A reminder that, in generating the examples for these screen captures, a bar has been placed over the names of the students for privacy reasons.

1/4    Print all    Print page

**Worsfold Demonstration 20/03/2003** **03 ITALIAN**

| Student                  | First day | Paid |
|--------------------------|-----------|------|
| Belting, Glenys          |           |      |
| Cooper, Andrew           |           |      |
| Father, Brian            |           |      |
| Father, Marie-Antonietta |           |      |
| Gardner, Daniel          |           |      |
| Goode, Sarah             |           |      |
| Graham, Joanna           |           |      |
| Green, Laura             |           |      |
| Hughes, Don              |           |      |
| Hughes, Janny            |           |      |
| Miles, Alison            |           |      |
| Miles, Margot            |           |      |
| Nash-Patuawa, Katina     |           |      |
| Pennington, Robyn        |           |      |
| Pennington, Stuart       |           |      |
| Young, Anne              |           |      |

Number of students : 16

Further examples of course lists follow.

**M136 WOODWORK** **Date 02/05/March**

| Student        | Address                            | Contacts   | Details   |
|----------------|------------------------------------|--|---|
| Blair, Ruth    | 8 Jamaica Road<br>Cherrybrook      | Home : 478 8000<br>Work : 387 8000<br>Cell :<br>Email: | Gender : Male<br>Age : 50-59<br>Ethnicity : European<br>NZ Res? : True        |
| Cooper, Carmac | 131 Khandallah Road                | Home : 479 7000<br>Work : 021 5000<br>Cell :<br>Email: | Gender : Male<br>Age : Unkwn<br>Ethnicity : Unknown<br>NZ Res? : True         |
| Cooper, Sue    | 65 Havelock Street<br>Johannesburg | Home : 477 3000<br>Work : 918 7000<br>Cell :<br>Email: | Gender : Male<br>Age : 20-29<br>Ethnicity : European<br>NZ Res? : True        |
| Dunlop, Susan  | P O Box 37<br>Wellesford South     | Home : 477 3000<br>Work : 385 5000<br>Cell :<br>Email: | 49<br>Gender : Female<br>Age : Unkwn<br>Ethnicity : Unknown<br>NZ Res? : True |
| Hart, Rachel   | P O Box 451                        | Home : 021 7000  | Gender : Female   |

Full details

| M136 WOODWORK         |            |          |             | Date 02/05/March |             |  |
|-----------------------|------------|----------|-------------|------------------|-------------|--|
| Student               | Course Fee | Invoiced | Amount paid | Receipt          | Credit card |  |
| Bl [redacted]         | \$65.00    | \$65.00  | \$65.00     | 748              |             |  |
| Co [redacted] mac     | \$65.00    | \$65.00  | \$65.00     | 1102             |             |  |
| Co [redacted]         | \$65.00    | \$65.00  | \$65.00     | 799              |             |  |
| Du [redacted] an      | \$65.00    | \$65.00  | \$65.00     | 1129             |             |  |
| Ha [redacted] el      | \$65.00    | \$65.00  | \$65.00     | 1103             |             |  |
| Me [redacted]         | \$65.00    | \$65.00  | \$65.00     | 754              |             |  |
| Mil [redacted] zabeth | \$65.00    | \$65.00  | \$65.00     | 1102             |             |  |
| Till [redacted]       | \$65.00    | \$65.00  | \$65.00     | 1520             |             |  |
| Till [redacted] d     | \$65.00    | \$65.00  | \$65.00     | 1520             |             |  |
| Totals                | 585.00     | 585.00   | 585.00      |                  |             |  |

Financial details

**Labels for course : M136 WOODWORK**

Mr [redacted] k  
8 J [redacted] pve  
Churton Park

Mr C [redacted] ar  
131 [redacted] oad  
Khandallah

Mr [redacted] dx  
65 [redacted] treet  
Johnsonville

Sus [redacted] an  
P O [redacted] 7  
Wellington South

R [redacted]  
P [redacted] 51  
Kilbirnie  
Wellington

Address labels

| M136 WOODWORK |                       | Date 02/05/March |         |
|---------------|-----------------------|------------------|---------|
| Receipt       | Student               | Receipt          | Student |
| 748           | Bl [redacted]         |                  |         |
| 1102          | Co [redacted] mac     |                  |         |
| 799           | Co [redacted]         |                  |         |
| 1129          | Du [redacted] an      |                  |         |
| 1103          | Ha [redacted] el      |                  |         |
| 754           | Me [redacted]         |                  |         |
| 1102          | Mil [redacted] zabeth |                  |         |
| 1520          | Till [redacted]       |                  |         |
| 1520          | Till [redacted] rd    |                  |         |

Receipt and name





### 3.3 Printing lists of courses

This is the process you can use to print list of the courses which your center offers.

On first entry, the screen will appear as shown below.

The screenshot shows a dialog box titled "List of courses" with several sections for configuring the print output:

- Include:**
  - Include active courses
  - Include pending courses
  - Include cancelled courses
- Print options:**
  - Course sizes (3 cols)
  - Times and dates (6 cols)
  - Funding details (3 cols)
  - Columns selected : 12
  - Orientation : Landscape
  - or the Tutor list
  - or the waiting lists
- Sort by:**
  - Course code
  - Course title
  - Start date
- Print by:**
  - All in one list
  - Separate categories
- Print days:**
  - All courses in one list (dropdown menu)
  - ... or on a particular date (text input)
- Print term:**
  - All Terms (dropdown menu)
- Include (Funding):**
  - TEC funded
  - Community Group funded
  - Self funded
  - Other
- Daily class report:**
  - Print this report instead for
  - Monday (highlighted)
  - Tuesdays
  - Wednesdays
  - Thursdays
  - Fridays
  - Saturdays
  - Sundays
- Between:** (text input)
- and:** (text input)
- Generate list** (button)

You have various choices, most of which are obvious.

This close-up shows the "Print days" dropdown menu expanded, listing the following options:

- All courses in one list (selected)
- All courses in one list
- Separate days lists
- Just Monday courses
- Just Tuesday courses
- Just Wednesday courses
- Just Thursday courses
- Just Friday courses
- Just Saturday courses

You can elect to choose to print those courses which occur on a particular day....

... and the final result will appear as :

Worsfold Demonstration 20/03/2003 Course list

| Course                 | Code | Tutor        | Room     | Max. | Num | Start date | End date   | Ter        | Day | Time  | Hours     | Fee   | Total   |        |
|------------------------|------|--------------|----------|------|-----|------------|------------|------------|-----|-------|-----------|-------|---------|--------|
| GERMAN                 | 01   | Butler, Rony | S3       | 15   | 11  | 01/02/2000 | 01/07/2000 | 0          | Mon | 7-9   | 40        | 25.00 | 275.00  |        |
| NZ SIGN                | 02   | Pa           | S2       | 16   | 12  | 01/02/2000 | 01/07/2000 | 0          | Mon | 7-9   | 40        | 5.00  | 60.00   |        |
| ITALIAN                | 03   | At           | A4       | 15   | 16  | 01/02/2000 | 01/08/2000 | 0          | Mon | 7-9   | 50        | 25.00 | 400.00  |        |
| MAORI                  | 04   |              | MARE     | 20   | 22  | 01/02/2000 | 01/11/2000 | 0          | Tue | 7-9   | 60        | 15.00 | 330.00  |        |
| ITALIAN 2              | 05   | At           | A4       | 15   | 11  | 01/02/2000 | 01/08/2000 | 0          | Wed | 7-9   | 40        | 25.00 | 275.00  |        |
| FRENCH                 | 06   | Sp           | A4       | 15   | 8   | 01/01/2000 | 01/08/1998 | 0          | Thu | 7-9   | 40        | 25.00 | 200.00  |        |
| WOMENS FITNESS         | 07   |              | HALL     | 0    | 23  | 01/02/2000 | 01/12/2000 | 0          | Mon | 6-7   | 40        | 55.00 | 1265.00 |        |
| YOGA                   | 08   |              | Mare     | 12   | 7   | 01/02/2000 | 01/10/2000 | 0          | Mon | 7-9   | 38        | 35.00 | 245.00  |        |
| Self Defence for Women | 09   | Lr           | Gym      | 20   | 18  | 01/02/2000 | 01/04/2000 | 1          | Wed | 7-9   | 12        | 0.00  | 0.00    |        |
| SELF IMAGE             | 10   | Mt           | Nicola   | S3   | 10  | 8          | 01/02/2000 | 01/04/2000 | 1   | Wed   | 7-9       | 14    | 20.00   | 160.00 |
| Self Image             | 10a  | Mt           | Nicola   | S3   | 10  | 1          | 01/01/2000 | 01/01/2000 | 2   | Wed   | 10-12     | 14    | 20.00   | 20.00  |
| YOGA                   | 11   | Be           | an,      | BAND | 12  | 6          | 01/02/2000 | 01/10/2000 | 0   | Thu   | 1.30-2.45 | 38    | 35.00   | 210.00 |
| WOMENS FITNESS         | 12   |              | Hall     | 18   | 15  | 01/02/2000 | 01/12/2000 | 0          | Thu | 7-9   | 30        | 55.00 | 825.00  |        |
| NO CERTIFICATE         | 13   | VM           | n, Peter | N6   | 10  | 10         | 01/02/2000 | 01/04/2000 | 1   | Mon   | 7-9       | 10    | 50.00   | 500.00 |
| DEFENSIVE DRIVING      | 13A  | VM           | n, Peter | N4   | 10  | 9          | 01/01/2000 | 01/01/2000 | 1   | Mon   | 7-9       | 10    | 50.00   | 450.00 |
| DEFENSIVE DRIVING      | 13B  | VM           | n, Peter | N6   | 10  | 0          | 01/01/2000 | 01/01/2000 | 2   | Mon   | 7-9       | 10    | 40.00   | 0.00   |
| Defensive Driving      | 13c  | VM           | n, Peter | N6   | 10  | 12         | 01/01/2000 | 01/01/2000 | 4   | Mon   | 7-9       | 10    | 40.00   | 480.00 |
| Defensive Driving      | 13d  | VM           | n, Peter | N6   | 10  | 11         | 01/01/2000 | 01/01/2000 | 3   | Mon   | 7-9       | 10    | 40.00   | 440.00 |
| Defensive Driving      | 13e  | VM           | n, Peter | N6   | 10  | 8          | 01/01/2000 | 01/01/2000 | 3   | Mon   | 7-9       | 10    | 40.00   | 320.00 |
| CHINESE COOKING        | 14   | VM           | face     | A9   | 12  | 2          | 01/02/2000 | 01/08/2000 | 0   | Mon   | 7-9       | 40    | 40.00   | 80.00  |
| PANEL BEATING          | 15   | Pd           | Kim      | A6   | 15  | 11         | 01/02/2000 | 01/11/2000 | 0   | Tue   | 7-9       | 30    | 50.00   | 550.00 |
| PHOTOGRAPHY            | 16   |              | ART      | 12   | 11  | 01/02/2000 | 01/07/2000 | 0          | Tue | 7-9   | 40        | 40.00 | 440.00  |        |
| FIRST AID CERT         | 17   |              | TTT      | 16   | 17  | 01/02/2000 | 01/04/2000 | 1          | Tue | 7-9   | 20        | 50.00 | 850.00  |        |
| FIRST AID FULL         | 17A  | Lr           | ttt      | 16   | 16  | 01/01/2000 | 01/01/2000 | 3          | Tue | 7-9   | 20        | 50.00 | 800.00  |        |
| First Aid              | 17b  | Lr           | Tt6      | 16   | 2   | 01/01/2000 | 01/01/2000 | 4          | Tue | 7-9am | 20        | 50.00 | 100.00  |        |
| Florist At             | 18   |              | A2       | 12   | 4   | 01/02/2000 | 01/04/2000 | 1          | Wed | 7-9   | 16        | 15.00 | 60.00   |        |
| Florist At             | 18a  | Lr           | A2       | 12   | 0   | 01/02/2000 | 01/04/2000 | 2          | Wed | 7-9   | 16        | 15.00 | 0.00    |        |
| ITALIAN COOKING        | 19   | Lr           | A9       | 16   | 16  | 01/02/2000 | 01/04/2000 | 1          | Wed | 7-9   | 16        | 20.00 | 320.00  |        |
| Italian Cooking        | 19a  | Lr           | A9       | 16   | 17  | 01/01/2000 | 01/01/2000 | 2          | Wed | 7-9   | 16        | 20.00 | 340.00  |        |
| Italian Cooking        | 19b  | Lr           | A9       | 16   | 16  | 01/01/2000 | 01/01/2000 | 3          | Mon | 7-9   | 16        | 20.00 | 320.00  |        |
| BOATMASTERS            | 20   | Sa           | d, Ken   | A6   | 15  | 7          | 01/02/2000 | 01/08/2000 | 0   | Thu   | 7-9       | 30    | 30.00   | 210.00 |
| Crat                   | 21   | MA           | Nicola   | ca6  | 10  | 5          | 01/01/2000 | 01/01/2000 | 1   | Fri   | 10-12am   | 16    | 25.00   | 125.00 |
| Crat                   | 21a  | MA           | Nicola   | ca6  | 10  | 6          | 01/01/2000 | 01/01/2000 | 3   | Fri   | 10-12am   | 16    | 25.00   | 150.00 |

02 Mar, 2003 Year : 2003

### 3.4 Printing lists of students

This process provides lists of your students and their details

On first entry, the screen will appear as shown below.

**List of students**

Include

- Contact details
- Course details
- Address labels
- Address labels for mailing list members

Orientation : landscape

Which students

- All students
- Just those with current courses
- Just those with current courses and debts

Just those with courses

Select

- Current in Term 1
- Current in Term 2
- Current in Term 3
- Current in Term 4
- Between two dates

Generate list

You have various choices. If you elect to print address labels then the address label dialogue, shown earlier, will appear.

A typical printout would appear as shown :

Worsfold Demonstration 20/03/2003 Student list

| Student     | Address      | Contacts  | Details   | Courses   | Fee  | Paid  |
|-------------|--------------|---|---|---|--|---|
| Abbott Gary | 10 Lev St    | Home : 3887475<br>Work : 3882840<br>Cell :<br>Email :         | Gender : Female<br>Age : 20-29<br>Ethnicity : European<br>Status : Fulltime<br>NZ Res? : True | 48 COMPUTERS 1<br>06 FRENCH<br>12 WOMENS FITNESS<br>13C Defensive Driving<br>20 BOATMASTERS<br>703 CALLIGRAPHY<br>50 COMPUTERS 1<br>Total             | 45.00<br>0.00<br>0.00<br>0.00<br>30.00<br>25.00<br>35.00<br>135.00 | 0.00<br>2255.00<br>40.00<br>0.00<br>0.00<br>0.00<br>0.00<br>2295.00 |
| Aristen     | 10 Lev St    | Home : 3887475<br>Work : 0800833477<br>Cell :<br>Email :      | Gender : Female<br>Age : 20-29<br>Ethnicity : European<br>Status : Fulltime<br>NZ Res? : True | 906 Care Givers<br>14 CHINESE COOKING<br>901 Basic Management<br>85 Intro MS Publisher<br>82 Intro MS Word<br>64c Internet<br>50 COMPUTERS 1<br>Total | 0.00<br>40.00<br>0.00<br>0.00<br>0.00<br>20.00<br>35.00<br>95.00   | 0.00<br>0.00<br>0.00<br>0.00<br>0.00<br>0.00<br>0.00<br>0.00        |
| Awin        | 8 Place umu  | Home : 04 902 4746<br>Work : 04 232 4935<br>Cell :<br>Email : | Gender : Male<br>Age : 50-59<br>Ethnicity : European<br>Status : Fulltime<br>NZ Res? : True   | 15 PANEL BEATING  | 0.00   | 0.00  |
| A Carol     | 5 F Lev St   | Home : 3883240<br>Work :<br>Cell :<br>Email :                 | Gender : Female<br>Age : 40-49<br>Ethnicity : European<br>Status : Fulltime<br>NZ Res? : True | 08 YOGA   | 35.00  | 0.00  |
| A Colleen   | Ma Ce PQ Lev | Home : 388 9347<br>Work :<br>Cell :<br>Email :                | Gender : Female<br>Age : 40-49<br>Ethnicity : European<br>Status : Fulltime<br>NZ Res? : True | 46 Taichi Beg   | 0.00   | 0.00  |
| A en        | Fo PQ Lev    | Home : 3880370<br>Work :<br>Cell :<br>Email :                 | Gender : Female<br>Age : 40-49<br>Ethnicity : European<br>Status : Fulltime<br>NZ Res? : True | 47 TAICHI ADV   | 0.00   | 15.00   |

02 Mar, 2003 Year : 2003

### 3.5 Printing lists of tutors

This process provides lists of your tutors and their details

On first entry, the screen will appear as shown below.

**List of Tutors**

Print option

Just name and courses

Full details

Full details (incl Tax, bank)

Payments list

Tutor hours summary

---

Include courses taken in

All courses     Term 2

All year         Term 3

Term 1          Term 4

Include only active courses

---

Include

All tutors     Only active tutors

Only tutors with courses in :

Select ▼

You have but three choices.

A typical printout would appear as shown (except that you would probably have more than one tutor!) :

#### Worsfold Demonstration 20/03/2003

#### Tutor list

| Name                                   | Address                                   | Contacts  | Courses                 |
|--|---|---|-------------------------|
| Baggins<br>Bilbo<br>Mr<br>Payscale : 2 | 5 Underhill Road<br>Hobbiton<br>The Shire | Home 06 345 6789<br>Work 06 987 6543<br>Cell 025 111 999<br>Email bilbo@underhill.co.nz | 32a Beginning Computers |

### 3.6 Printing the T.E.C.'s RS44 returns

This process produces the three pages of your T.E.C. returns.

On first entry, the screen will appear as shown below.

Students aged < 16  
 Include    Exclude

Non New Zealand residents  
 Include    Exclude

To have a category list printed for checking - select from the list below then generate.

School Y7-Y10 Level ▲

School Y11-Y15 Level ▢

Literacy - Basic ▢

ESOL - English for speakers ▢

Mathematics - Basic numerz ▢

Art, Music, Crafts ▢

Humanities (excluding langu. ▢

Maori language ▼

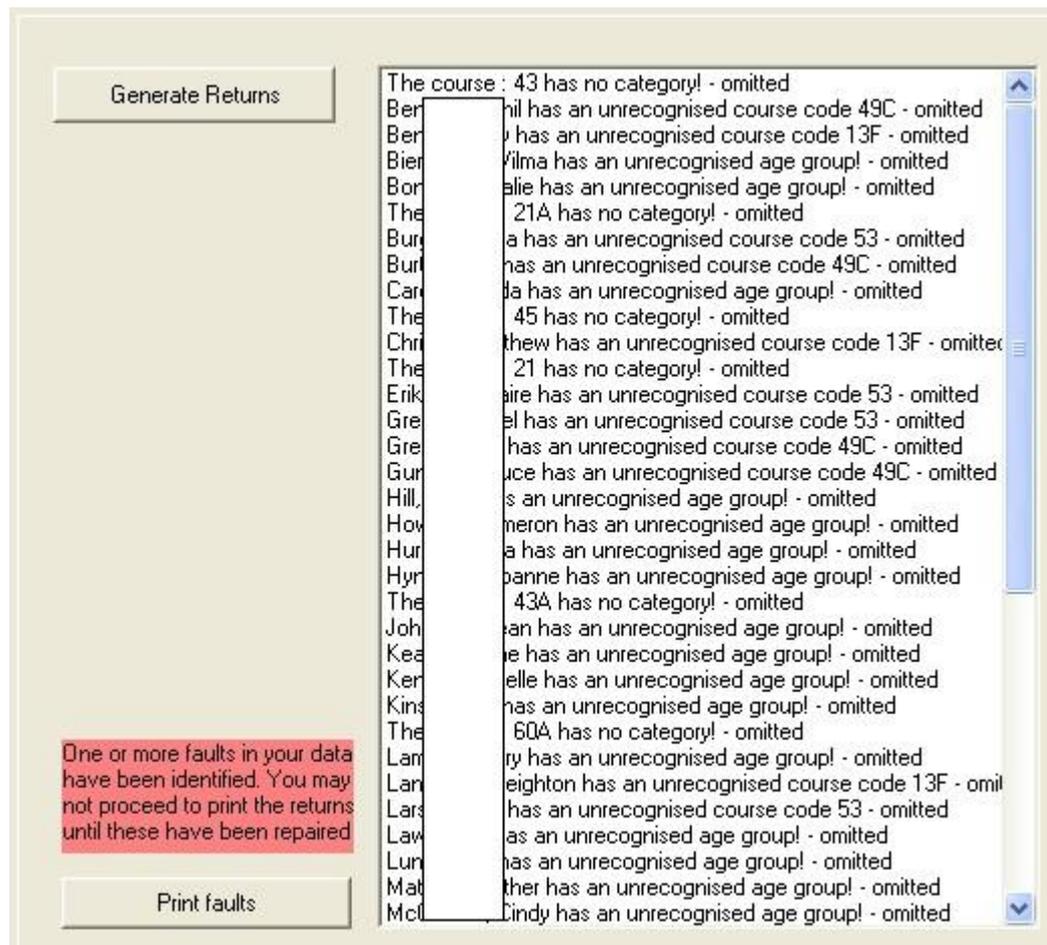
Generate Returns

You have a few choices, as shown above. You can select the have an individual category printed and this will provide you with a details printout which you can use

to identify incorrect student information.

Click on the 'Generate returns' button. Your database will be scanned. Those courses attached to group : 'Other' will be omitted, as will students in the age range 'Under 16'.

If errors are discovered then they will be listed :



Once you have returned to the courses and student data and you have made any necessary repairs, then the T.E.C. RS44 returns will be generated. The composite illustration below provides an indication of their appearance.

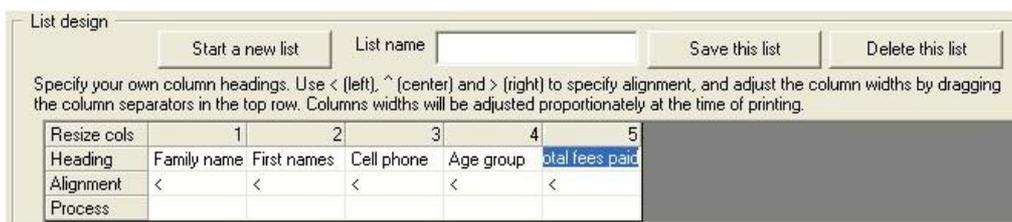


The left hand side of the screen provides a list of previously designed lists from which you may select for reprinting.

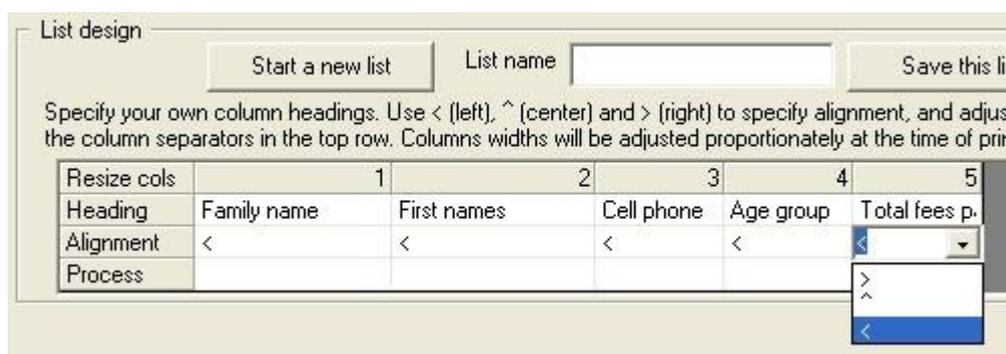
The right hand side provides the selection process used in the course of list design, and the bottom of the screen provides a display of the appearance of your currently selected list.

In the example above, I am designing a list of students. Consequently, the selection window provides choices relating to students.

In the example below I have now selected five fields from the list.



Now I have widened the first two columns by dragging the dividing line between their columns, and I am about to request that the 'Total fees paid' columns should be right aligned (>). (< = left aligned, ^ = center aligned and > = right aligned).



Next I am about to request that, at the bottom of the list of fees the total is printed.



Finally i am giving my wonderful list as most memorable name, by which I will easily recognise it the next time I wish to select it for printing. In practice, a name such as 'Students - cell phone and fees paid' would be a more sensible name.



Having finished, I generated the list, having added a further 'Blank column' which I forgot to rename to something more sensible. You may add as many blank columns as you wish. Repeating any other existing column offers you the chance to delete it from your design.

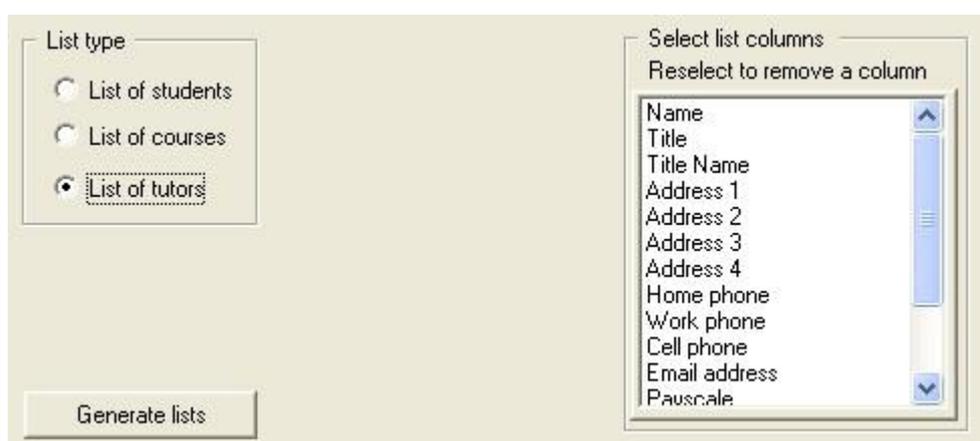
To do so, I would simply reselect my list, make the necessary change, and re-save it.

Had I instead elected to design a list of courses, then I would be able to select details relating to courses.

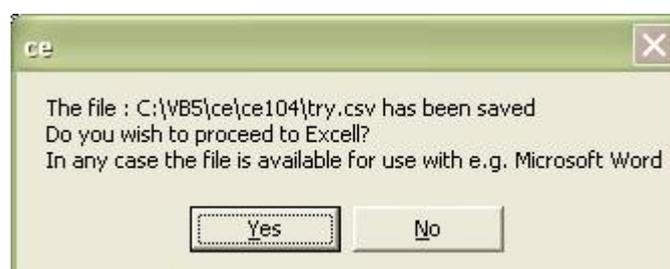
I would also have the opportunity to select those courses which I wished to have included in my list on printing.



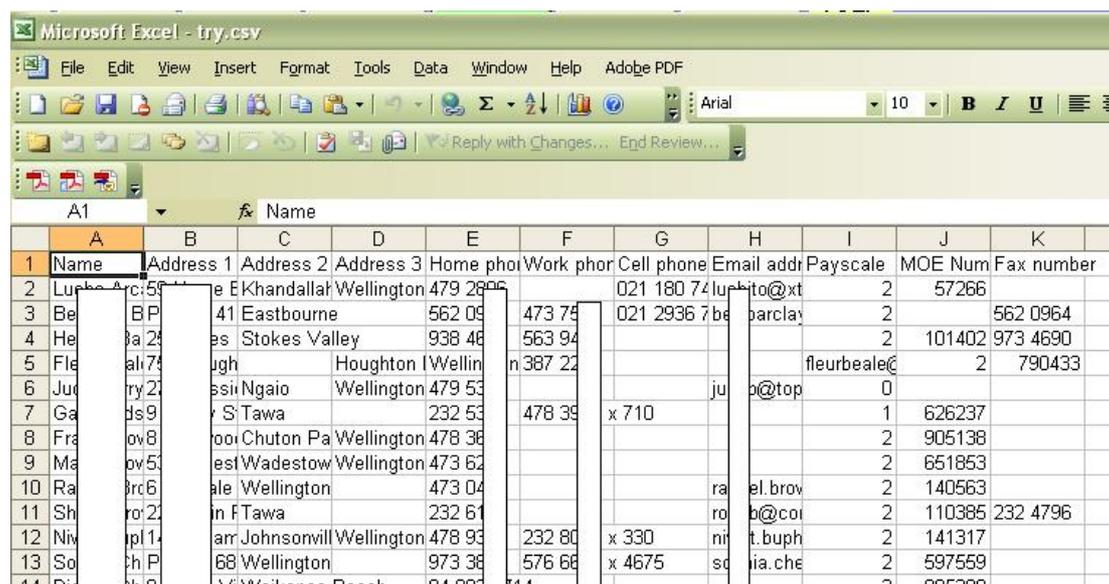
And, finally, had I elected to design a list of tutors, then I would be able to select details relating to tutors.



When generating a user-defined list you have the option to either print the list (Click 'Generate lists') or to export the data to a 'Comma-separated variable' list (Click 'Export to csv file'). The latter may, if you so wish be imported into Excel. You will be asked to specify a file name and directory ...



and the file will automatically be displayed in Excel, as shown below. This file can be used for mail-merging into Microsoft Word.

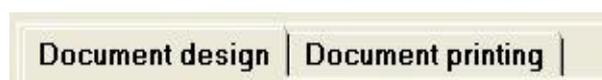


|    | A      | B         | C                | D                | E          | F          | G          | H             | I        | J       | K          |
|----|--------|-----------|------------------|------------------|------------|------------|------------|---------------|----------|---------|------------|
| 1  | Name   | Address 1 | Address 2        | Address 3        | Home phone | Work phone | Cell phone | Email address | Payscale | MOE Num | Fax number |
| 2  | Lue... | Ac...     | E Khandallah     | Wellington       | 479 2806   |            | 021 180 74 | lue...@xt     | 2        | 57266   |            |
| 3  | Be...  | B P       | 41 Eastbourne    |                  | 562 09     | 473 75     | 021 2936 7 | barclay       | 2        |         | 562 0964   |
| 4  | He...  | ba 24     | es Stokes Valley |                  | 938 46     | 563 94     |            |               | 2        | 101402  | 973 4690   |
| 5  | Fle... | ali 74    | ugh              | Houghton (Wellin |            | n 387 22   |            | fleurbeale@   | 2        |         | 790433     |
| 6  | Jud... | ry 21     | essi Ngaio       | Wellington       | 479 53     |            |            | ju...@top     | 0        |         |            |
| 7  | Ga...  | ds 9      | y S Tawa         |                  | 232 53     | 478 39     | x 710      |               | 1        | 626237  |            |
| 8  | Fra... | ov 8      | ooi Chuton Pa    | Wellington       | 478 38     |            |            |               | 2        | 905138  |            |
| 9  | Ma...  | ow 51     | est Wadestow     | Wellington       | 473 62     |            |            |               | 2        | 651853  |            |
| 10 | Ra...  | irc 6     | ale              | Wellington       | 473 04     |            |            | ra...el.brov  | 2        | 140563  |            |
| 11 | Sh...  | ror 21    | in F Tawa        |                  | 232 61     |            |            | ro...b@cor    | 2        | 110385  | 232 4796   |
| 12 | Niv... | pl 14     | arr Johnsonwill  | Wellington       | 478 93     | 232 80     | x 330      | nit.buph      | 2        | 141317  |            |
| 13 | So...  | ch P      | 68               | Wellington       | 973 38     | 576 66     | x 4675     | sc...ia.che   | 2        | 597559  |            |
| 14 | Ni...  | W         | Waiwaka Beach    |                  | 04 994     | 744        |            |               | 2        | 095390  |            |

### 3.8 Using the Word Processor

This process allows you to design your own documents.

At the top of the Word Processor screen are two tabs, each of which takes you to one of the main processes.



#### 1. Document Design

Documents are not exactly traditional word processor documents, where you have complete control over the layout and appearance. Documents within this package are subdivided into three optional areas.

The first and third (Top and Bottom) sections are, in fact, word processor areas wherein you may design a text area, including codes which will be reproduced in the final printout as the relevant information relating to the student for whom the document is being printed.

The second area (the Middle) consists of a list section where you may choose from a range of supplied list formats. (Should you require a format not currently supplied then please contact Worsfold Software)

The document design screen is divided into several sections.

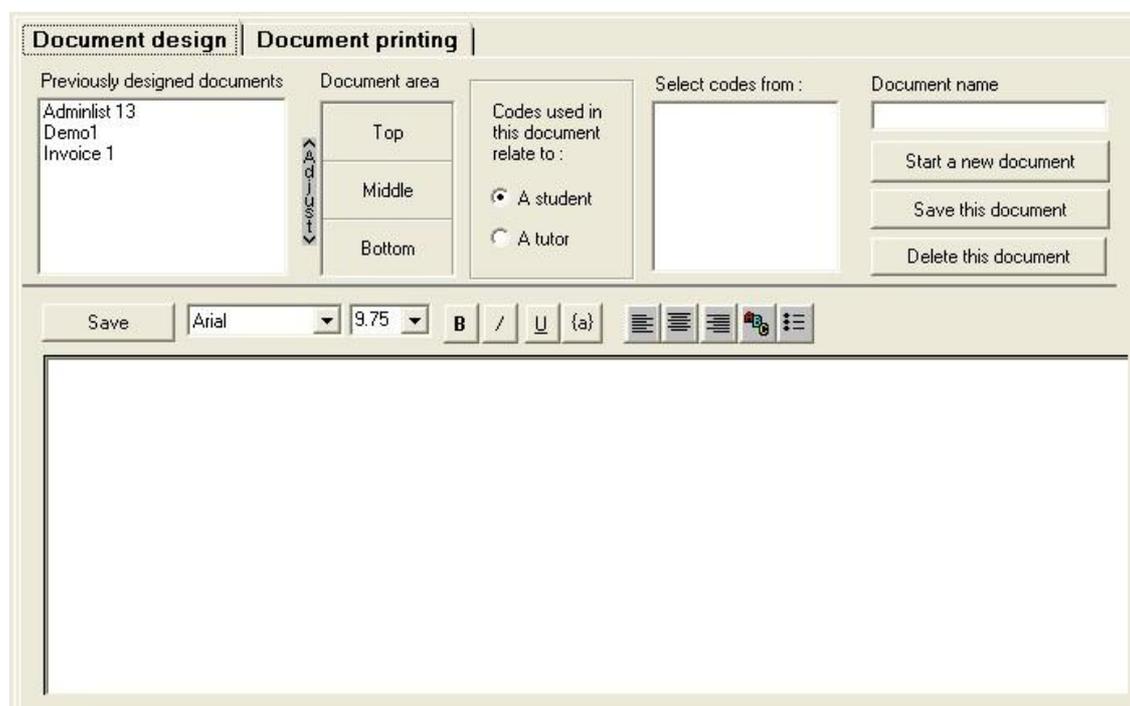
The first lists existing documents, allowing you to retrieve previously designed documents for further modification.

The second allows you to access the Top, Middle or Bottom area and to adjust the relevant sizes of each of these sections. This section is referred to below as the 'document area tool'.

Thirdly, the document may be based on information relating to either a student or a tutor.

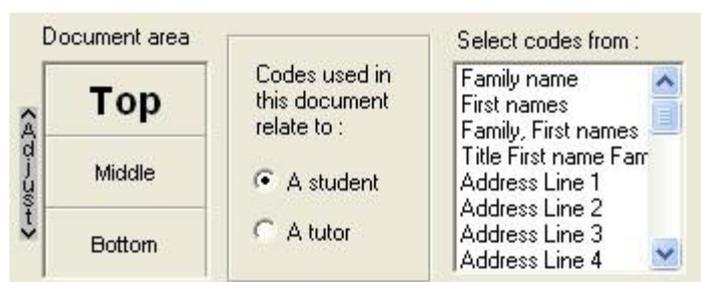
Fourthly you will see the code selection area - referred to below as the 'code tool'.

Finally, in the top half, is the area where you can give your document a name (perhaps more meaningful than those used in this demonstration) and you can save the current document design.

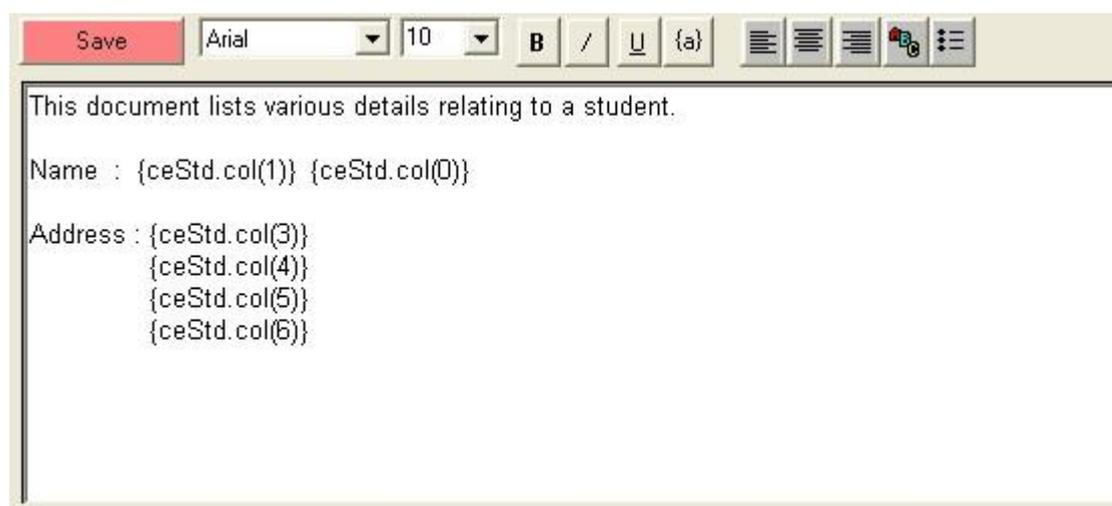


At the bottom of the screen is the word processing area where you may enter your text, along with its embedded codes.

To begin, then, click on the 'Design a new document' button, followed by the 'Top' area of the 'document area' tool.



Since this document is based on a student (see above) then the 'code tool' will offer details relating to students.



In the example above I have entered some text and, at the relevant place, have clicked on an item from the 'code tool'. Obviously, I am a little confused as to whether this document is a letter or an information sheet!

Wendy, of Takapuna Grammar, has successfully cut and pasted her logo into this area. This is best done by using Microsoft Word to create a blank document into which you then insert your logo picture 'from file'. Once the picture is in the Word document you can resize it by dragging its handles until it is a suitable size for bringing through to your ComEd document. To do this, click on the resized logo (to select it) and press Ctrl-C (to 'Copy' into the clipboard). Now use Alt-Tab to come back to this package with your document shown. Click the cursor where you wish the logo to go and press Cntrl-V (to 'Paste' the picture into the document).

Once you have finished, click on the (now) red 'Save' button to have the 'Top' part of your document committed to memory.



Next, click on the 'Middle' area of the document area tool....

| Table type             | Column headings   |
|------------------------|---|
| Courses list 1         | Course   Code   Tutor   |
| Courses list 2         | Course   Tutor   Term   Day   Time   Start date   Room                          |
| Courses list 3         | Course   Tutor   Day   Time   Start date   Room                                 |
| Courses list 4         | Course   Code   Tutor   Day   Time   Start date   Room                          |
| Courses list 5         | Course   Code   |
| Courses list 6         | Course   Term   Day   Time   Start date   Room                                  |
| Courses list 7         | Course   Day   Time   Start date   Room   |
| Courses list 8         | Course   Code   Day   Time   Start date   Room                                  |
| Courses list 9         | Course   Code   Day   Time   Start date   Finish date   Hours   Room            |
| Course fees list 1     | Course   Code   Day   Time   Start date   Room   Fee   Paid                     |
| Course fees list 2     | Course   Code   Tutor   Day   Time   Start date   Room   Fee   Paid             |
| Course fees list 3     | Course   Code   Fee   Paid  |
| Course fees list 4     | Course   Code   Fee   Paid   Owning   |
| Receipt list 1         | Course   Code   Fee   Paid  |
| Receipt list 2         | Course   Code   Tutor   Day   Time   Start date   Room   Fee   Paid             |
| Course list title page | This choice requires the 'Top' to be just 'Top' and the 'Bottom' to be 'Bottom' |

... and select the list format which you wish to have displayed in the middle of your document. The currently available choices are shown above.

Proceed, in a similar fashion, to click on the 'Bottom' area of the document area tool and enter any text which you wish to appear at the bottom of the document.

The document area tool, shown below, can be used to adjust the relative sizes of the document devoted to each of the area. This is done by grabbing ("i.e. clicking on - and holding down your left mouse button) and dragging the horizontal lines which divide the document into the three areas.

If you wish to have a document which has no middle and no bottom then you might slide the dividing lines down to minimise the areas devoted to the unwanted sections.

Once you have finished, and have 'Save'd the bottom area, give your document a name and click on the 'Save document' button

Now, let's turn our attention to the second tab.

## 2. Document printing

At the left of the displayed screen, shown below, is a list of your documents. Select the one which you wish to print.

Next, select the students or tutors for whom you wish to print. You can use the 'select all' button at the bottom of the screen to select all(!)

**Word Processing - document printing**

Step 1 Select the document      Step 2 Select the ...      Step 3 Select any courses the document refers to      Step 4 Other choices

Test 1

Include

All courses

Only active courses

Print for

All ...

Only those with courses

Finally ...

Select all      Select all      Print

Step 3 allows you to select any particular courses which you wish to have included in the middle section of your document. If you select no courses then ALL will be assumed to be selected.

Step 2 Select students      Step 3 Select any courses the document refers to      Step 4 Other choices

ADAMS, SHEREE  
ADIE, MICHAEL  
ALLAN, JANET  
ALVE, JULIANNE  
ANDERSON, ADOREE  
ANDERSON, STEPHANIE  
ARMSTRONG, ROBYN  
BALL, TERESA  
BANKERS, GARY  
BANKERS, NOLEEN  
BAXTER, MAURENE  
BEAMES, MARGARET  
BEETHAM, KATHY  
BELCHER, JOCELYN (JO)  
BELL, ERINA  
BELLAMORE, MAREE  
BLUNDEN, LORNA  
BOSTON, HELENA  
BOWKER, LILIAN  
BOWLER, MARGARET  
BRADBURY, KAYE

SELF-AWARENESS - PER  
September Refunds 9  
SMALL BUSINESS ACCOU  
SMALL BUSINESS ACCOU  
SPINNING WOOL R148  
STAINED GLASS\LEADLI  
STAINED GLASS\LEADLI  
T'AI CHI FOR HEALTH H1  
TE REO MAORI - TE TIMA  
TE REO MAORI - TE TIMA  
TRACTOR DRIVING FOR  
TRADITIONAL EASTER F  
UPHOLSTERY H149  
WOMEN'S SELF DEFENC  
YOGA H121  
YOGA H122  
YOGA H123  
YOGA H124  
YOGA - INTRODUCTORY  
YOGA - INTRODUCTORY

Include

All courses

Only active courses

Print for

All students

Only those with courses

Finally ...

Select all      De-select all      Print

Step 4 allows you to restrict the printing to only active courses. Inactive courses, even if selected in step 3, will be excluded.

Step 5 allows you to restrict the printing to only those students who are enrolled in courses. Others will be excluded, even if they have been selected in step 2.

Finally, click on the 'Print' button to have your documents generated.

And, for your edification, an example of a document is displayed below.

This document displays information relating to the student concerned.

Student name : JANE ALL

Adress 4 CEDAR CRESCENT  
FEILDING

Here are the details of your courses.

| Subject | Code | Day | Time  | Start date | Room | Fee     | Paid    |
|---------|------|-----|-------|------------|------|---------|---------|
| YOGA    | H121 | Thu | 7-9PM | 30/01/2003 | TECH | \$33.00 | \$33.00 |
| YOGA    | H124 | Thu | 7-9PM | 1/05/2003  | TECH | \$33.00 | \$33.00 |

Please contact me if you have any questions concerning your courses.

Yours faithfully

E. Sleadone

One of the possibilities which may be included as the 'middle' of your document is the 'Course list title page'. Should you select this option then the 'Top' portion of the document should just contain the word 'Top' and the 'Bottom' just 'Bottom'.



An example of a course list title page is shown, reduced to fit, below.

COURSE NAME : ACCESS  
COURSE CODE : S101

**ATTENDANCE REGISTER**

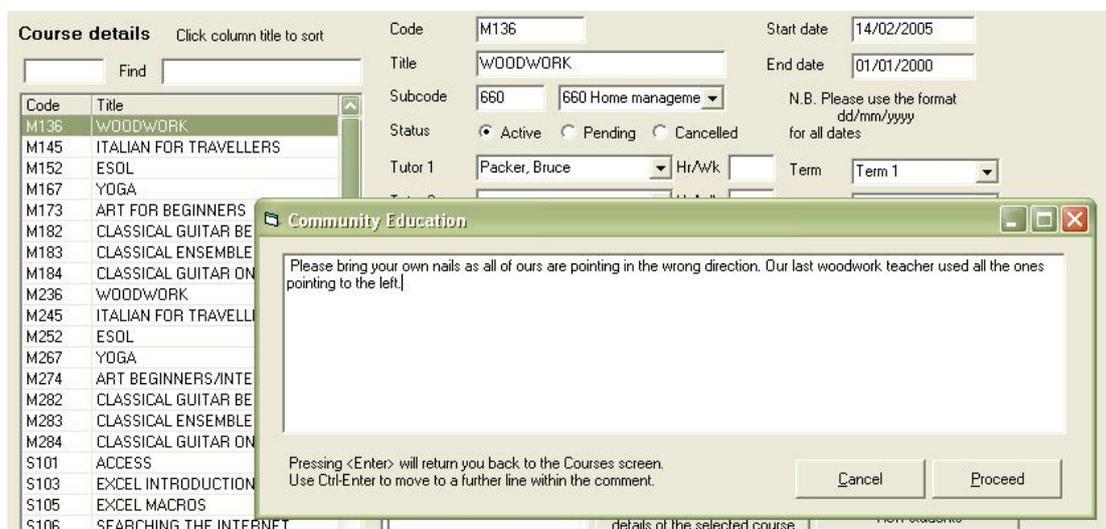
|               |                |
|---------------|----------------|
| NAME OF TUTOR | Lachman Prasad |
| DAY           | Saturday       |
| TIME OF CLASS | 9AM-12PM       |
| ROOM NUMBER   | 47A            |
| START DATE    | 05/03/2005     |
| END DATE      | 12/03/2005     |
| TOTAL HOURS   | 10             |
| COURSE FEE    |                |
| MATERIALS FEE |                |
| FUNDING       | TEC Funded     |

THIS REGISTER MUST BE RETURNED  
TO THE OFFICE AFTER EACH CLASS

Worsfold Software Ltd  
5 Worsfold Lane  
Palmerston North

Email : [randcbuitler@paradise.net.nz](mailto:randcbuitler@paradise.net.nz)

One further detail : You will remember that, during the entry of course details under the 'Edit courses' button, it was possible to enter a comment in the field labelled 'Comment to appear in documents'. This is where you can send a message concerning the course to those enrolled. An example of a comment being entered is shown below....



... and it will appear in the printed document, as shown below.

| Subject   | Code | Day | Time  | Start date | Room  | Fee     | Paid    |
|---|------|-----|-------|------------|-------|---------|---------|
| WOODWORK  | M136 | Mon | 7-9PM | 14/02/2005 | 45    | \$65.00 | \$0.00  |
| Please bring your own nails as all of ours are pointing in the wrong direction. Our last woodwork teacher used all the ones pointing to the left. |      |     |       |            |       |         |         |
| CLASSICAL GUITAR BEGIN  | M182 | Mon | 7-8PM | 14/02/2005 | Music | \$45.00 | \$45.00 |
| PIANO - ONGOING   | W289 | Wed | 7-8PM | 11/05/2005 | Music | \$45.00 | \$45.00 |
| Piano Ongoing: Please bring to first class music you are working on or want to learn.   |      |     |       |            |       |         |         |

In conclusion, documents are also the basis of receipts, credit notes, invoices and statements. This is where you design such and examples of each are included in the package. You should make it a priority to edit these to meet your own needs.

### 3.9 Room timetables

Selecting this option takes you to the following screen, whereon you select the date or dates for which you wish to print timetables.

**Room timetables**

Generate room timetable for each date

Between :

and :

An example of a portion of such a timetable is shown below.

| Room       | 7.00pm - | 7.15pm - | 7.30pm - | 7.45pm - | 8.00pm - | 8.15pm - | 8.30pm - | 8.45pm - |
|------------|----------|----------|----------|----------|----------|----------|----------|----------|
| 45         |          |          |          |          |          |          |          |          |
| 15         |          |          |          |          |          |          |          |          |
| J'ville    |          |          |          |          |          |          |          |          |
| Stud Centr | T121     | T121     | T121     | T121     |          |          |          |          |
| Music      | MU3      |
| WPA        |          |          |          |          |          |          |          |          |
| 47A        | WK109    |
| Library    |          |          |          |          |          |          |          |          |
| 44         |          |          |          |          |          |          |          |          |
| 9          |          |          |          |          |          |          |          |          |
| 16         |          |          |          |          |          |          |          |          |

### 3.10 Financial reports (Detailed version only)

This process allows you to print extracted lists of financial transactions.

#### Financial Summaries

Select

Invoices issued between dates  and   
 Invoices numbered between  and   
 Receipts issued between dates  and   
 Receipts numbered between  and

Sort receipts by  Receipt number  Payment method

Include only cheques (Numbers recorded in the 'Comment' area)  
 Print payment methods as separate lists

Credit notes issued between dates  and   
 Credit notes numbered between (omit 'CN')  and   
 Financial summary

The initial screen appears as shown, offering you a selection of lists of invoices, receipts, credit notes and a financial summary. The current maximum invoice number and receipt number, and the current date are used as the upper limits of the default ranges. You may adjust these to your needs.

A typical (part) listing of invoices is shown below.

#### Worsfold Demonstration 20/03/2003

| Date       | Invoice | Student           | Course                   | Code | Amount  |
|------------|---------|-------------------|--------------------------|------|---------|
| 22/03/2003 | 13579   | Colleen Adams     | Defensive Driving        | 13e  | \$40.00 |
| 22/03/2003 | 13580   | Colleen Adams     | Defensive Driving        | 13e  | \$40.00 |
| 22/03/2003 | 13581   | Colleen Adams     | SELF IMAGE               | 10   | \$20.00 |
| 22/03/2003 | 13582   | Colleen Adams     | SELF IMAGE               | 10   | \$20.00 |
| 22/03/2003 | 13583   | Helen Adin        | DD CERTIFICATE           | 13   | \$50.00 |
| 22/03/2003 | 13585   | Colleen Adams     | PAINTING & SKETCHING BEG | 29a  | \$20.00 |
| 22/03/2003 | 13586   | Colleen Adams     | PAINTING & SKETCHING BEG | 29a  | \$20.00 |
| 22/03/2003 | 13591   | Helen Adin        | WOMENS FITNESS           | 12   | \$55.00 |
| 22/03/2003 | 3333    | Angela Scarsbrook | GERMAN                   | 01   | \$25.00 |

If you select the last of the choices, 'Receipts between two receipt numbers', then the options expand a little :

**Financial Summaries**

Select

Invoices issued between dates  and

Invoices numbered between  and

Receipts issued between dates  and

Receipts numbered between  and

Sort receipts by  Receipt number  Payment method

This option allows you to generate banking lists. The example below is of receipts numbered between 1 and 80, sorted on payment method. Totals for each method are printed at the bottom of the list.

## Worsfold Demonstration 20/03/2003

## Financial list

| Receipt | Date       | Student               | Course                        | Code | Amount   | Method |
|---------|------------|-----------------------|-------------------------------|------|----------|--------|
| 19      | 18.03.2003 | Kirsten Abbott        | PANEL BEATING                 | 15   | \$50.00  | Cash   |
| 27      | 22.03.2003 | Carol Adams           | YOGA                          | 08   | \$35.00  | Cash   |
| 28      | 22.03.2003 | Claire Allison        | Art WORKSHOP                  | 35   | \$20.00  | Cash   |
| 30      | 22.03.2003 | Gary Abbott           | EMBROIDERY (DAY)              | 40   | \$30.00  | Cash   |
| 34      | 22.03.2003 | Hasanthika Attanayake | WORD PROCESSING<br>ELEMENTARY | 51   | \$20.00  | Cash   |
| 50      | 22.03.2003 | Gary Abbott           | DESK TOP PUBLISHING           | 57   | \$35.00  | Cash   |
| 51      | 22.03.2003 | Gary Abbott           | Intro Internet                | 54   | \$20.00  | Cash   |
| 53      | 22.03.2003 | Colleen Adams         | SELF IMAGE                    | 10   | \$20.00  | Cash   |
| 54      | 22.03.2003 | Kirsten Abbott        | PHOTOGRAPHY                   | 16   | \$40.00  | Cash   |
| 58      | 22.03.2003 | Kirsten Abbott        | COMPUTERS 1                   | 50   | \$35.00  | Cash   |
| 65      | 22.03.2003 | Kirsten Abbott        | FIRST AID FULL                | 17A  | \$50.00  | Cash   |
| 66      | 22.03.2003 | Kirsten Abbott        | ITALIAN COOKING               | 19   | \$20.00  | Cash   |
| 66      | 23.03.2003 | Helen Adin            | GERMAN                        | 01   | \$25.00  | Cash   |
| 67      | 23.03.2003 | Carol Adams           | GERMAN                        | 01   | \$25.00  | Cash   |
| 68      | 23.03.2003 | Claire Allison        | GERMAN                        | 01   | \$25.00  | Cash   |
| 70      | 23.03.2003 | Debra Allum           | GERMAN                        | 01   | \$25.00  | Cash   |
| 72      | 23.03.2003 | Colleen Adams         | GERMAN                        | 01   | \$10.00  | Cash   |
| 76      | 06.04.2003 | Kathleen Akuhata      | MAORI                         | 04   | \$15.00  | Cash   |
| 78      | 06.04.2003 | Jane Andrew           | ITALIAN                       | 03   | \$10.00  | Cash   |
| 20      | 22.03.2003 | Maria Allan           | Computers Stage 2             | 58   | \$35.00  | EFTPOS |
| Total   |            |                       |                               |      | \$545.00 |        |

## Payment method totals

|              |          |
|--------------|----------|
| Cash         | \$510.00 |
| Cheque       |          |
| Credit card  |          |
| EFTPOS       | \$35.00  |
| Auto payment |          |
| Total        | \$545.00 |



# Chapter 4

## Utilities

| What's in this chapter?             | Page |
|-------------------------------------|------|
| 4.1 Course sizes                    | 4.2  |
| 4.2 Delete students with no courses | 4.3  |
| 4.3 Statistics                      | 4.3  |
| 4.4 Backup / Restore                | 4.6  |
| 4.5 Default settings                | 4.8  |
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| 4.8 Case changes                    | 4.14 |
| 4.9 End-of-year processes           | 4.15 |
| 4.10 Course changes                 | 4.17 |
| 4.11 Email database                 | 4.19 |
| 4.12 Evaluation process             | 4.25 |
| 4.13 Cross check student hours      | 4.26 |

The Utilities button provides access to a number of functions related to the package. These are accessed via a series of buttons down the left hand side of the screen. (The buttons are shown below – adjusted to two columns.)

|                                 |                     |
|---------------------------------|---------------------|
| Course sizes                    | Financial prints    |
| Delete students with no courses | Case changes        |
| Statistics                      | End-of-year process |
| Backup / Restore                | Course changes      |
| Default settings                | Email database      |
| Financial defaults              |                     |

If you have adopted the 'Detailed financial system' then two of these, Financial defaults and Financial prints, will not be visible.

### 4.1 Course sizes

Clicking on this button reveals a table of all of the information relating to courses, particularly displaying the course maximum sizes and their current enrolments. You might remember that it is possible to give a particular user the right to access just this part of the package so that, from another office, another person can advise potential students of the availability of places in courses.

**Course Sizes**      Display only courses in:      

Click on a column heading to sort, and again to reverse sort

| Code | Title             | Maximum | Current | Status | Start      | End        | Term | Day      | Hours | Weeks | Room       | Time        | Fee |
|------|-------------------|---------|---------|--------|------------|------------|------|----------|-------|-------|------------|-------------|-----|
| M136 | WOODWORK          | 12      | 10      | Active | 14/02/2005 | 01/01/2000 | 1    | Monday   | 16    |       | 45         | 7-9PM       |     |
| M145 | ITALIAN FOR TRAVI | 20      | 22      | Active | 14/02/2005 | 01/01/2000 | 1    | Monday   | 16    |       | 15         | 7-9PM       |     |
| M152 | ESOL              | 30      | 33      | Active | 14/02/2005 | 01/01/2000 | 1    | Monday   | 64    |       | J'ville    | 9.30-11.30A |     |
| M167 | YOGA              | 20      | 22      | Active | 14/02/2005 | 01/01/2000 | 1    | Monday   | 10    |       | Stud Centr | 6-7.15PM    |     |
| M173 | ART FOR BEGINNEF  | 12      | 10      | Active | 14/02/2005 |            | 1    | Monday   | 16    |       | 48         | 7-9PM       |     |
| M182 | CLASSICAL GUITAR  | 6       | 5       | Active | 14/02/2005 | 01/01/2000 | 1    | Monday   | 8     |       | Music      | 7-8PM       |     |
| M183 | CLASSICAL ENSEME  | 6       | 3       | Active | 14/02/2005 | 01/01/2000 | 1    | Monday   | 8     |       | Music      | 8-9PM       |     |
| M184 | CLASSICAL GUITAR  | 6       |         | Active | 14/02/2005 | 01/01/2000 | 1    | Monday   | 8     |       | Music      | 6-7PM       |     |
| M236 | WOODWORK          | 12      | 1       | Active | 09/05/2005 | 01/01/2000 | 2    | Monday   | 16    |       | 45         | 7-9PM       |     |
| M245 | ITALIAN FOR TRAVI | 20      | 4       | Active | 09/05/2005 | 01/01/2000 | 2    | Monday   | 16    |       | 15         | 7-9PM       |     |
| M252 | ESOL              | 50      |         | Active | 09/05/2005 | 01/01/2000 | 2    | Monday   | 64    |       | J'ville    | 9.30-11.30A |     |
| M267 | YOGA              | 20      | 7       | Active | 09/05/2005 | 01/01/2000 | 2    | Monday   | 10    |       | Stud Centr | 6-7.15PM    |     |
| M274 | ART BEGINNERS/IN  | 12      |         | Active | 09/05/2005 |            | 2    | Monday   | 16    |       | 48         | 7-9PM       |     |
| M282 | CLASSICAL GUITAR  | 6       |         | Active | 09/05/2005 | 01/01/2000 | 2    | Monday   | 8     |       | Music      | 7-8PM       |     |
| M283 | CLASSICAL ENSEME  | 6       | 2       | Active | 09/05/2005 | 01/01/2000 | 2    | Monday   | 8     |       | Music      | 8-9PM       |     |
| M284 | CLASSICAL GUITAR  | 6       | 1       | Active | 09/05/2005 | 01/01/2000 | 2    | Monday   | 8     |       | Music      | 6-7PM       |     |
| S101 | ACCESS            | 6       | 2       | Active | 05/03/2005 | 12/03/2005 | 1    | Saturday | 10    |       | 47A        | 9AM-12PM    |     |
| S103 | EXCEL INTRODUC    | 6       | 4       | Active | 09/04/2005 | 09/04/2005 | 1    | Saturday | 7     |       | 47A        | 9AM-4PM     |     |

You can, if you so wish print this table. You can also elect to display only those courses for a particular term, or those operating between two dates, or on a particular date.

At the bottom of this screen are several useful buttons.

|  |  |  |   |
|--|--|--|---|
| <input type="button" value="Delete selected course(s)"/> | <input type="button" value="Delete all current enrolments"/> | <input type="button" value="Recalculate sizes"/> | <input type="button" value="Recount 'Previous' courses"/> |
|--|--|--|---|

The first of these allows you to quickly delete several courses at once.

The second is rather drastic, and allows you to delete all current enrolments. (It was added for one centre which wished to 'start the year again'.

The third performs the same function as the little button labelled 'Ct.' at the top of the course selector on the student screen. It causes all current course sizes to be recalculated. (They can get out of kilter when multiple terminals are adding students at the same time.)

The final button does a global recount, student by student, of the number of previous courses taken by each student. This is done by scanning any previous years' databases found in your \ce directory. Having done this, the 'number of previous courses' will be displayed on a button on the student screen. Clicking on the 'View courses' button next to the display will cause the student's previously taken courses to be displayed.

## 4.2 The deletion of students with no current courses.

You may, at any stage, wish to remove all old students from the file who are no longer enrolled in current courses. This screen allows you to do that. Such students are listed and you can select them either using the mouse or by clicking one of the three 'global selection' buttons available.

**Deletion of students with no current courses**

The students listed below have no current courses

N.B. You might consider it wise to make a backup BEFORE proceeding with steps on this window.

| Student          | Non-current courses |  | Amount owing |
|------------------|---------------------|--|--------------|
| Adams, Carol     | 1                   |  | 35.00        |
| Crisp, Kathleen  | 1                   |  | 25.00        |
| Grim, Margaret   | 1                   |  |              |
| Johnson, Cora    | 1                   |  |              |
| Lacey, Robert    | 1                   |  | 20.00        |
| Nelson, Margaret | 1                   |  |              |
| Riley, Lynda     | 1                   |  | 35.00        |
| Stewart, Noeline | 1                   |  |              |

All displayed students

All those without debts

All those with no courses

Unselect all students

Delete selected students

Once you have made your selection, click on the 'Delete selected students' button and they will be removed!

### 4.3 Statistics

How many students do you have, and how many courses are they enrolled in, and what are your total fees? All these questions, and more, are answered at the click of a button. The left hand side of the screen provides the figures relating to your tutors, courses and students. Click the 'Print statistics' button to obtain a printout of your statistics.

The statistics screen has two tabs – Statistics and Filter. The first results in the following display.

The screenshot displays the 'Statistics' screen. On the left, a table provides a summary of student and course data. On the right, a list of 'Current courses Term 1' is shown. At the bottom, there are buttons for 'Print statistics' and 'Print list', along with instructions for clicking on figures and entries.

| Detail                              | Number  |
|-------------------------------------|---------|
| Students                            |         |
| on database                         | 752     |
| with current courses                | 724     |
| Tutors                              |         |
| on database                         | 53      |
| with current courses                | 20      |
| Current courses                     |         |
| Term 1                              | 19      |
| Term 2                              | 9       |
| Term 3                              | 17      |
| Term 4                              | 3       |
| Year                                | 37      |
| Total current courses               | 85      |
| Non-current courses                 | 77      |
| Enrolments                          |         |
| Total enrolments in current courses | 835     |
| Fees                                |         |
| Total invoiced                      | \$160   |
| Total paid                          | \$6860  |
| Total owing                         | -\$6700 |

Current courses Term 1

- 09 Self Defence for Women (18 enrolments)
- 10 SELF IMAGE (8 enrolments)
- 13 DD CERTIFICATE (10 enrolments)
- 13A DEFENSIVE DRIVING (9 enrolments)
- 17 FIRST AID CERT (17 enrolments)
- 19 ITALIAN COOKING (16 enrolments)
- 21 Craft (5 enrolments)
- 22 Garnishing (5 enrolments)
- 23 FIRST AID RECERTS (11 enrolments)
- 29a PAINTING & SKETCHING BEG (6 enrolments)
- 41 ENGINEERING (8 enrolments)
- 43 Video Camera (7 enrolments)
- 45 The world that shakespeare (7 enrolments)
- 46 Taichi Beg (24 enrolments)
- 47 TAICHI ADV (11 enrolments)
- 50 COMPUTERS 1 (16 enrolments)
- 50a COMPUTERS 1 (16 enrolments)
- 52 SPREADSHEETS (14 enrolments)
- 57 DESK TOP PUBLISHING (5 enrolments)

Print statistics    Click on a figure to view the details    Print list    Click on an entry to jump to it's screen

As detailed on the display above, if you click on one of the listed courses then you will 'jump' to the relevant screen, in this case 'Edit courses', and the selected course details will be displayed.

A full display of all of the statistics is shown below.

| Detail                              | Number     |
|-------------------------------------|------------|
| Students                            |            |
| on database                         | 475        |
| with current courses                | 475        |
| Tutors                              |            |
| on database                         | 73         |
| with current courses                | 38         |
| Current courses                     |            |
| Term 1                              | 52         |
| Enrolments / Average size           | 455 / 8.8  |
| Term 2                              | 47         |
| Enrolments / Average size           | 65 / 1.4   |
| Term 3                              | 0          |
| Enrolments / Average size           | 0 / 0      |
| Term 4                              | 0          |
| Enrolments / Average size           | 0 / 0      |
| All year (i.e. Term = 0)            | 0          |
| Enrolments / Average size           | 0 / 0      |
| Total current courses               | 99         |
| Non-current courses                 | 0          |
| Enrolments                          |            |
| Total enrolments in current courses | 509        |
| Average enrolments                  | 5.1        |
| Fees                                |            |
| Total invoiced                      | \$28165.00 |
| + Total refunds                     | \$900.00   |
| - Total received                    | \$28035.00 |
| - Total credits                     | \$880.00   |
| = Total owing                       | \$150.00   |
| Hours                               |            |
| TEC funded                          | 1165.50    |
| Community group                     | 170        |
| Self funded                         | 40         |
| Other                               |            |
| Total hours                         | 1375.50    |
| Fees by funding category            | 0.00       |
| TEC Funding Fees                    | 25155.00   |
| Materials                           | 0.00       |
| Total                               | 25155.00   |
| Community Gp Fees                   | 660.00     |
| Materials                           | 0.00       |
| Total                               | 660.00     |
| Self funded Fees                    | 900.00     |
| Materials                           | 0.00       |
| Total                               | 900.00     |
| Other Fees                          | 0.00       |
| Materials                           | 0.00       |
| Total                               | 0.00       |
| Total Fees                          | 26715.00   |
| Total Materials                     | 0.00       |
| Grand total                         | 26715.00   |

If you click on one of the figures, then further details of that figures will be displayed on the right hand side of the screen, from whence you may print the displayed list.

The second tab on the statistics screen – Filter – leads to the following screen.

**Filtering** This process is intended to enable you to identify or count those students who match particular criteria. For example, to find all of those who live in Riverside Road, you could enter 'Riverside Road' into the address field.

Family name

First names

Address

and  or

Address

Phones

Email

Gender  Male  Female  Either

Take courses in term :

Criteria

Match exactly N.B. Searches are NOT case sensitive.

Begin with

Contain

Matching students

|      |     |
|------|-----|
| Lay  | ane |
| Quir | nce |

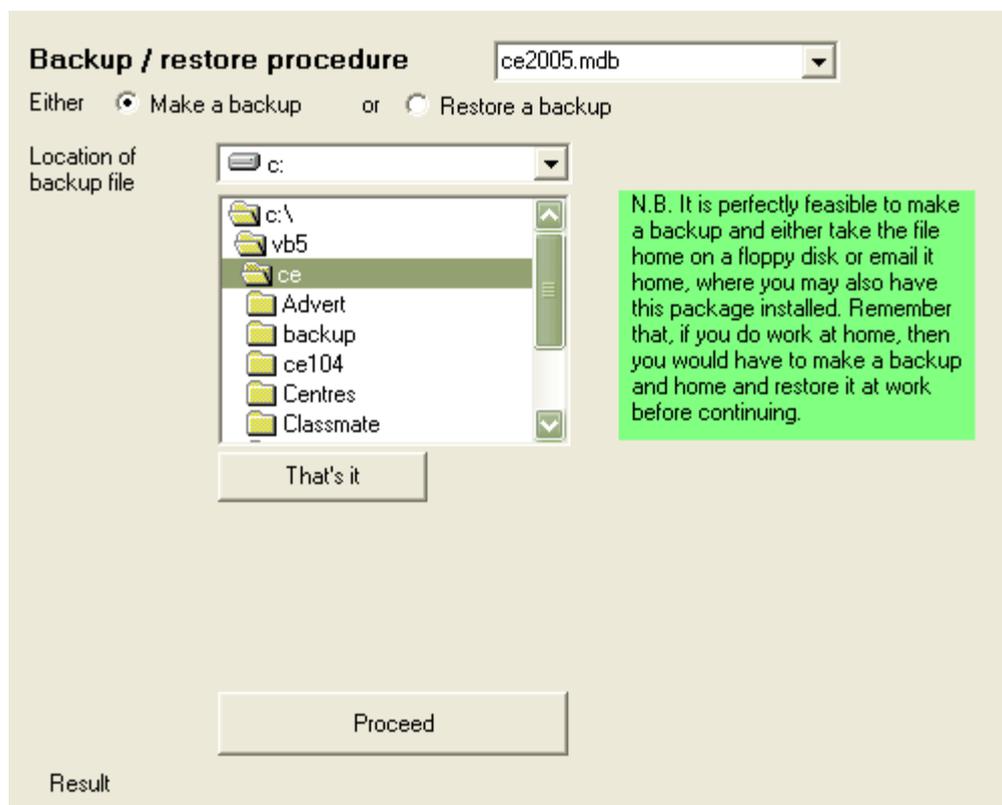
Count : 2

You can use this screen to identify students who match the criteria which you specify. In the example above the filter has been used to identify those students who live in an 'Avenue' or a 'Lane'.

You could, similarly, use it to find those who live in 'RD' (Rural Delivery) AND 'Feilding'.

#### 4.4 Backup / Restore database

This process allows you to make a backup of your database or to restore a previously made backup. The selection is made at the top of the screen.



If you click on the 'Make a backup' option then the screen will appear as shown above.

Navigate to the drive where you wish to create your backup, and click 'That's it'. At the conclusion of the process the result will be displayed at the bottom of the screen. An example of this display is shown below.



If, instead, you click on the 'Restore a backup' option then the screen will appear as shown below. Navigate to the drive where your backup is stored and any backup files contained therein will be listed in the small list window. You will be looking for a file named e.g. CE2004.001 Once you have identified the drive / directory holding this file, click 'Proceed' and your backup will be unpacked into your \ce directory.

**Backup / restore procedure** ce2005.mdb

Either  Make a backup or  Restore a backup

Location of backup file c:

- c:\
- vb5
- ce
- Advert
- backup
- ce104
- Centres
- Classmate

That's it

Select back to restore

Backup file  
The name of the file is  
ceddmmyyyy.zip

- ce2004.zip
- ce2005.zip
- ceall.zip
- cedb.zip

Proceed

Result

N.B. It is perfectly feasible to make a backup and either take the file home on a floppy disk or email it home, where you may also have this package installed. Remember that, if you do work at home, then you would have to make a backup and home and restore it at work before continuing.

## 4.5 Default settings

The following screen illustrates the setting of certain defaults which relate to the package. These are presented across five tabs, the first of which is shown below.

| Default settings  | More defaults | Day combinations | Calendar | Splash picture |   |  |  |  |  |
|---|---------------|------------------|----------|----------------|---|--|--|--|--|
| <p><b>Default settings</b></p> <p>Automatically increment to the next course code when creating a new course <input type="checkbox"/></p> <p>When on the students' screen, auto-refresh the class totals every how often? <span style="border: 1px solid gray; padding: 2px;">60 minutes</span></p> <p>On the student's screen, ask if each new student is related to the currently visible student <input type="checkbox"/></p> <p><b>REAP environment</b><br/>This replaces the funding categories and the sub-codes with an alternative set</p> <p>Use the REAP set of categories <input type="checkbox"/></p> <p><b>DEAF environment</b><br/>This allows for a variety of changes to students, courses and tutors screens and is designed allow the package to be used by the Deaf Association of New Zealand</p> <p>Use the DEAF Assoc. environment <input type="checkbox"/></p> <p><b>Early childhood age group</b><br/>Include 0-5yrs as an age group <input type="checkbox"/></p> |               |                  |          |                | <p><b>Centre address details</b></p> <p>Address line 1 <span style="border: 1px solid gray; padding: 2px;">PO Box 72-456</span></p> <p>Address line 2 <span style="border: 1px solid gray; padding: 2px;">5 Edinburgh Ave</span></p> <p>Address line 3 <span style="border: 1px solid gray; padding: 2px;">Papakura</span></p> <p>Phone number <span style="border: 1px solid gray; padding: 2px;">092950661 ext. 889</span></p> <p>Fax number <span style="border: 1px solid gray; padding: 2px;"></span></p> <p>eMail address <span style="border: 1px solid gray; padding: 2px;">communityeducation@rosehill-</span></p> <p><b>Gender and Ethnicity default</b><br/>You may, if you so wish, have the default gender and ethnicity set to 'Unknown'</p> <p>Default both Gender and Ethnicity to 'Unknown' <input type="checkbox"/></p> <p>Include 'New Zealander' in ethnicities. This will count as 'European' for the returns. <input checked="" type="checkbox"/></p> <p>Include 'New Zealand Asian' in ethnicities. This will count as 'Asian' for the returns. <input type="checkbox"/></p> <p style="text-align: right;"><span style="border: 1px solid gray; padding: 5px 15px;">Save settings</span></p> |  |  |  |  |

The settings on the first tab are :

These are :

1. Do you wish to automatically increment to the next course code (numerically) when entering a new course? If your course codes are numerical then this can save you some time.
2. While on the student's data screen the list of courses displays the current number of enrolments. This can be refreshed every so many minutes via the setting made here. This is, of course, only of concern where enrolments are being made at more than one terminal on the network.
3. Again on the student screen when you click on the 'Add new student' button you can have the program stop and ask whether or not the new student has the same contact details as the student currently displayed. If so, then this saves a considerable amount of data entry. This switch turns this question on or off. Note that there is an 'S' button on the student screen which you can use to request a new students who is a sibling of the currently displayed student. The 'S' button really makes this setting obsolete.

#### 4. Reap Environment

This package is in use in a number of REAP centres throughout New Zealand. Ticking this box causes the REAP course categories to be used instead of the standard ComEd ones.

#### 5. DEAF Environment

The package is also designed to work in the New Foundation environment. Clicking on this choice causes many changes to occur both to the choices available, to the codes used, and the reports included in the package.

#### 6. Early childhood age group

Some centres have requested that they be able to enter very young 'students'. Ticking this box causes a '0-5 years' option to be added to the range of age groups.

#### 7. Centre address details

You may enter here the address and contact details of your centre. This information may be imbedded in documents, as it has been, for example, in the course list title page.

## 8. Gender and Ethnicity defaults

This setting allows you to set both the gender and ethnicity default settings to 'Unknown'.

You can also use this to add 'New Zealander' and/or 'New Zealand Asian' to the list of selectable ethnicities. These will count as 'European' and 'Asian' respectively in the determination of ethnicity for the RS44 returns.

The screenshot shows a settings window with a green header bar containing five tabs: 'Default settings', 'More defaults', 'Day combinations', 'Calendar', and 'Splash picture'. The 'More defaults' tab is selected. The main content area is light beige and contains three sections:

- Waitlist**: A paragraph explaining the waitlist facility, followed by a checkbox labeled 'Use the waitlist facility' which is checked.
- Age group categories**: A paragraph explaining that age groups can be calculated from birth dates, followed by a button labeled 'Calculate age groups'.
- Default postal code**: A paragraph explaining that a default postal code can be set, followed by a text input field and a 'Save settings' button.

The second defaults tab displays those shown above. They are :

### 1. The Waitlist facility

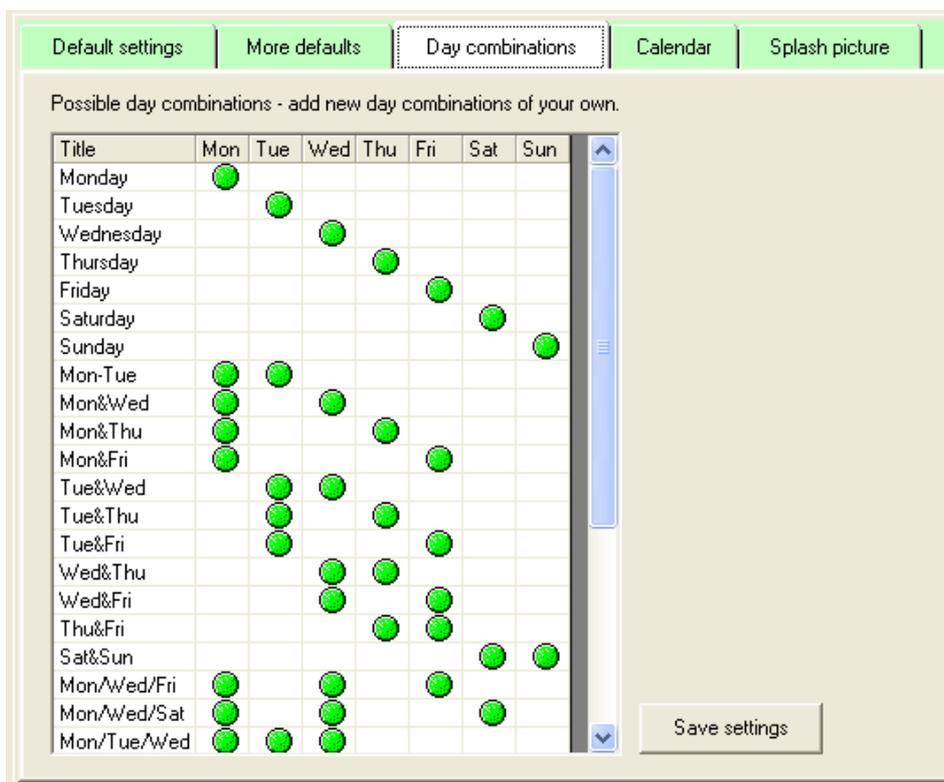
Click this box to switch the waitlist facility on.

### 2. Age group categories

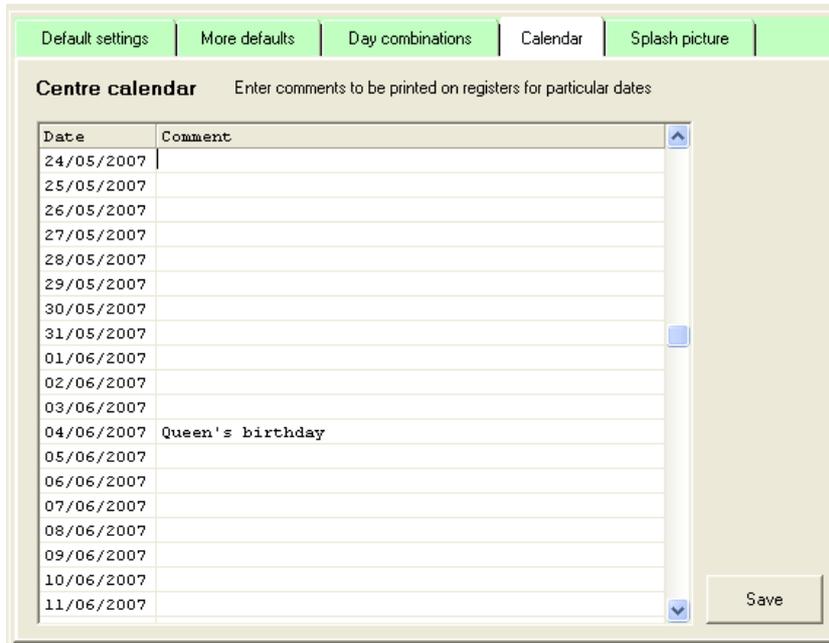
Clicking this option will cause the age group of all students for whom you have entered a 'date of birth' to be automatically calculated and stored.

### 3. Default Postal Code

Enter here the postal code which you wish to have added automatically to each new student entered.



The third defaults tab reveals the table via which you may add to or alter the 'days' available for attachment to courses. The definition of 'Monday' is a single green dot in the 'Monday' column, and 'Mon/Wed/Fri' contains three dots, one each under 'Monday', 'Wednesday' and 'Friday'. By following these examples you can define further possibilities of your own as and when required.



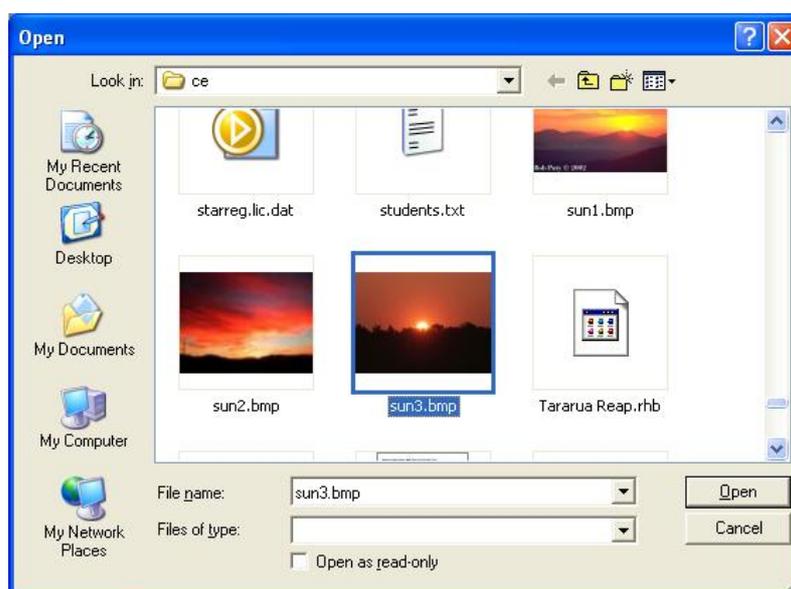
The fourth tab display the current year’s calendar, via which you may enter comments concerning days on which the centre is shut. Once you have done this these comments will appear on printed registers against the dates specified. e.g.

| Class : T6 - Stage 3 Guitar |         | Tutor : Baggins , Bilbo |    | Dates of class meetings and attendance |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|-----------------------------|---------|-------------------------|----|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-----|-----|-----|-----|-----|-----|-----|-----|
| Receipt                     | Student |                         |    | Mon                                    | Mon          | Mon          | Mon          | Mon          | Mon          | Mon          | Mon          | Mon | Mon | Mon | Mon | Mon | Mon | Mon | Mon |
|                             |         |                         |    | 19 May, 2008                           | 26 May, 2008 | 02 Jun, 2008 | 09 Jun, 2008 | 16 Jun, 2008 | 23 Jun, 2008 | 30 Jun, 2008 | 07 Jul, 2008 |     |     |     |     |     |     |     |     |
|                             | Aan     | raham                   | 1  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             | Alk     | her                     | 2  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             | Als     | da                      | 3  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             | App     | laire                   | 4  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             | Jen     | ye                      | 5  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 6  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 7  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 8  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 9  |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 10 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 11 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 12 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 13 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 14 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 15 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 16 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 17 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 18 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 19 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |
|                             |         |                         | 20 |  |              |              |              |              |              |              |              |     |     |     |     |     |     |     |     |

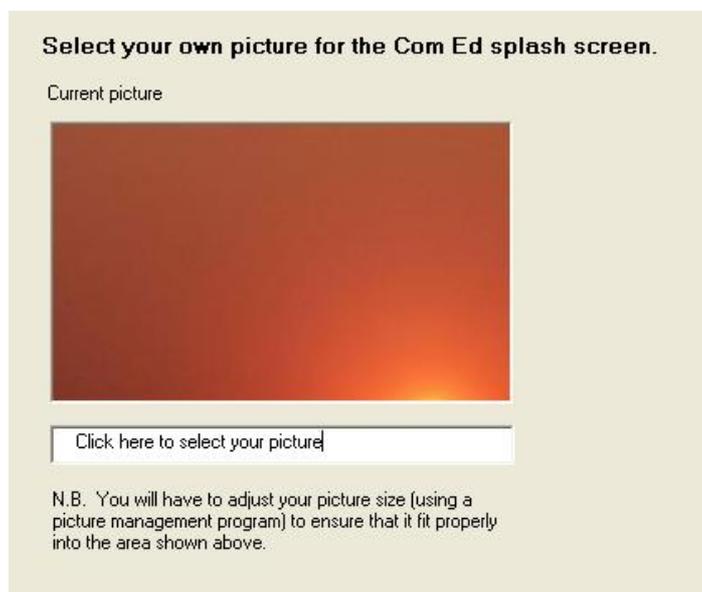


The final tab provides a screen via which you can specify your own 'splash screen' picture – be it a photograph of your school or your favourite family picture or your pet.....

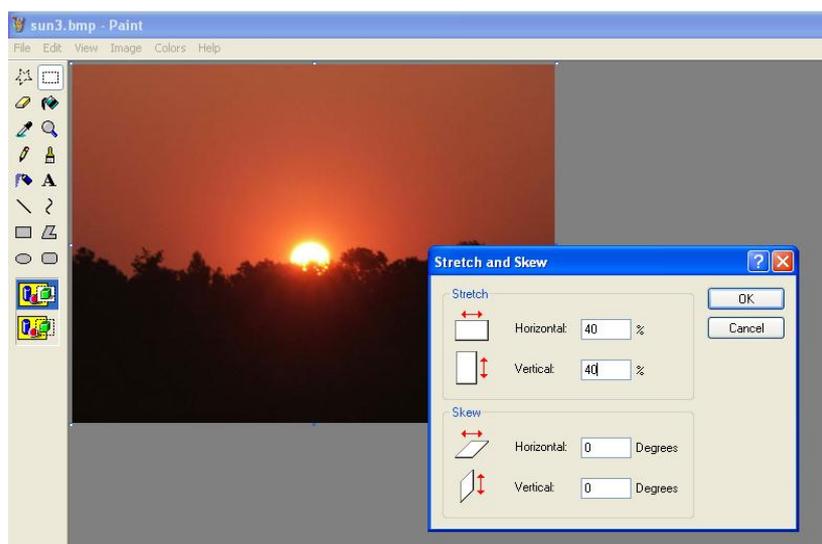
In the example below, I've decided to select the picture on the sun rising which we've used as a part of the Worsfold Logo. I clicked on the labelled box in the defaults screen above and then selected the picture as shown below.



The result was less than pleasing...



... as I had not bothered to reduce the picture to a suitable size. It was far too big. So I used the 'Paint' program which comes as part of the Accessories of Windows to 'stretch/skew' the picture to 40% of its original size, saving the result as a separate file. (I had to do this a couple of times and found that reductions of 65% (horizontal) and 50% (vertical) gave the best result.



Reselecting the new picture gave the following result:

Now my splash screen appears :



## 4.6 Financial defaults

This is where you can specify a number of the details relating to the financial aspects of this package.

**Financial defaults**

Receipt document

Next receipt number

When printing receipts stop to allow printer choice

Invoice document

Statement document

Leave the receipt number blank if you wish to manually enter the number each time a receipt is printed and tick the following box

We wish to enter the receipt number manually

Automatically print a receipt if 'Paid \$amount' is clicked

Next invoice number

Next credit note number

Allow direct entry of receipt details  Yes  No

Allow editing of course fee on student  Yes  No

Allow removal of invalid payment transactions.  Yes  No

Allow editing of payment details  Yes  No

**Automatic discounts**

Enter the title and percentage of any standard discounts which you wish to apply

| Discount title | Percentage |
|----------------|------------|
| Staff          | 25         |
| One third      | 33         |
|                | 10% 10     |
|                | 20% 20     |
|                |            |
|                |            |
|                |            |
|                |            |

Switch back to the simple financial system (with warning screen to follow!)

1. The first three entries allow you to specify the names of the documents (designed via 'Print lists / Word processor' - an example of each, which you can modify to your own needs - is distributed with the package) which form the basis of your receipt, invoice and statement.

There are two credit note designs provided with the package and you may also alter these to your own requirements. One is titled 'Credit note (Paid out)' and the other 'Credit note (Not paid out)'. These will automatically be used as the two documents for credit note printing but you should, as suggested, alter them first to your own requirements.

2. Enter the 'next receipt number' in the space provided. This will automatically increment each time you print a receipt. As suggested in the green message, leave this entry blank if you wish to manually enter the receipt number each time a student pays....

3. ... in which case you would tick the box to indicate that you wish to manually enter receipt numbers. Some centres may not wish to automatically allocate or print receipts but prefer to issue them separately and record the numbers again the course enrolments. If this is your wish then check the 'Yes' option here.

4. Tick the following box if you wish to automatically print a receipt (based on the settings above) each time you register a payment by simply clicking on the 'Paid' amount. (See the chapter on the 'Detailed financial system' for full details of this process.

5. The next two entries are the 'Next invoice number' and the 'Next credit note number'. Enter these according to your needs.

6. The final four on the left hand side of the screen allow you to give permission to edit some financial details directly via the student's display. These are :

- Receipt details
- Course fee details
- The removal of invalid transactions
- Payment details

The third entry above involves the right to completely remove a payment transaction. This is most unacceptable from an auditing point of view, particularly if a receipt has been printed. However, it has been found to be the most useful way of

---

correcting a mistake – e.g. a payment has been registered against the wrong student, or you accidentally registered payment of only part of the fee.

8. Turning our attention to the right hand side of the screen, you can set up a range of standard discounts which may then be applied to courses. The entry for 33% will be processed as one third (which is slightly different to 33% - sometime by a matter of a few cents).

One centre was very keen to switch from the complex financial system back to the simple one. A button has been added which allow you to do this. Unfortunately, it is NOT possible to go the other way.

Finally, of course, 'Save changes' when you have completed your adjustments.

## 4.7 Financial prints

This section has a tab strip with four possibilities.



### 4.7.1 Print unprinted receipts.

**Printing unprinted receipts**

Select those receipts which you wish to print

| Student                               | Receipt | Amount  |
|---------------------------------------|---------|---------|
| <input type="checkbox"/> Art, Kirsten | 13611   | \$35.00 |
| <input type="checkbox"/> As, Carol    | 13612   | \$35.00 |
| <input type="checkbox"/> Maria        | 13613   | \$55.00 |
| <input type="checkbox"/> and, Sue     | 13614   | \$25.00 |

If you have receipted payment of fees without actually printing the receipts then you can visit this area to print them.

Those students with unprinted receipts are listed. You can select individual students, or all of them, and have the outstanding receipts printed.

#### 4.7.2 Print invoices

Those students for whom debts have been generated but against which there are no entries in the 'Receipt/Invoice number' column, will be counted and the courses affected will be listed, as shown below. Confirm your invoice design (designed via 'Print lists / Word processor) and confirm the next invoice number to be allocated.

The third step in the process is to select the course or courses for which you wish to print invoices for outstanding debts, and click 'Generate invoices'

### Printing invoices

This process will print invoices for students enrolled in the selected course(s) where, on the enrolment record, the course fee has been billed but no previous invoice has been printed.

**Step 1** Select the invoice design

**Step 2** Next Invoice number

**Step 3** Select course(s) for invoicing

| Code | Title                    | Invoices |
|------|--------------------------|----------|
| 01   | GERMAN                   | 9        |
| 02   | NZ SIGN                  | 1        |
| 03   | ITALIAN                  | 1        |
| 04   | MAORI                    | 2        |
| 05   | ITALIAN 2                | 1        |
| 10a  | Self Image               | 2        |
| 13d  | Defensive Driving        | 1        |
| 15   | PANEL BEATING            | 2        |
| 16   | PHOTOGRAPHY              | 1        |
| 17A  | FIRST AID FULL           | 1        |
| 19   | ITALIAN COOKING          | 1        |
| 30   | Photography for painting | 2        |
| 40   | EMBROIDERY (DAY)         | 1        |
| 54   | Intro Internet           | 1        |
| 57   | DESK TOP PUBLISHING      | 1        |

**Step 4**

### 4.7.3 Print statements

Students will be listed, along with their current financial position. An example of such a list is shown below.

#### Printing statements

This process will print statements for the selected students

**Step 1** Select the statement design

**Step 2** Select  Print nil-balance statements  Omit nil-balance statements

**Step 3** Select students

| Student | Current debt |
|---------|--------------|
| Adrian  | 325.00       |
| Abbie   | 119.00       |
| Adrian  | 90.00        |
| Andrew  | 85.00        |
| Andrew  | 54.00        |
| Abbie   | 25.00        |
| Scott   | 25.00        |
| Adrian  | 0.00         |
| Aku     | 0.00         |
| Allan   | 0.00         |
| Alle    | -1.00        |
| Abbie   | -10.00       |
| Allis   | -20.00       |
| Att     | -20.00       |
| And     | -35.00       |

**Step 4**

Confirm your statement design (designed via 'Print lists / Word processor) and decide whether or not you wish to print statements where the student's current net debt is zero.

The third step in the process is to select the students for whom you wish to print statement and click 'Generate statements'

#### 4.7.4 Print unprinted credit notes

This section follows the same pattern as that for printing unprinted receipts.

Students with unprinted credit notes will be listed, as shown below.

**Printing unprinted credit notes**

Select those credit notes which you wish to print

| Student       | Cred.Note | Amount |
|---------------|-----------|--------|
| Ar... Kerry   | CNInv6599 | 45.00  |
| Bd... tine    | CNInv6602 | 85.00  |
| Cd... nne     | CNInv6600 | 55.00  |
| Da... a       | CNInv6598 | 50.00  |
| Go... ry      | CNInv6595 | 70.00  |
| Jo... n       | CNInv6603 | 85.00  |
| Le...         | CNInv6594 | 70.00  |
| Low... robert | CNInv6597 | 55.00  |

Select all      Print selected credit notes

Select those for whom you wish to print notes and proceed to print.

## 4.8 Case changes

Way back in the olden days computers could only work in upper case, and it became fashionable, nay essential, to have all data entered in capitals. We have come a bit further along the track now but some old databases still contain capitals-only data. If you have had your data converted from such a database then you might well wish to update the appearance of the entries. This process allows you to do just that.

**Change of case**

This utility allows you to change the case of various text items throughout the database

Change selected items to upper case       Change selected items to lower (sentence) case

**Students**                      **Courses**                      **Tutors**

Names                       Titles                       Names

Addresses                       Addresses

|       |          |
|-------|----------|
| Wor   |          |
| Rhd   | Alan     |
| Fras  |          |
| Krai  | na       |
| Her   | e        |
| Star  | ne       |
| Milla | ra       |
| Pat   | nthony   |
| The   | ottfried |
| Tait  |          |
| Jorg  | Mr Per   |
| Burk  |          |
| John  | Matthew  |

Several possibilities are available (including the option to re-capitalise!). Make your choices and 'Proceed' and the results of the conversion will be displayed in the list provided.

## 4.9 End-of-year processes

Each year the package operates with a new database, named according to the year, e.g. ce2004.mdb, ce2005.mdb. The end-of-year process is simply a matter of making a copy of the existing year's database, optionally including or excluding tutors, courses and students. All other details such as list and document designs, default settings etc will be copied across and will be available in the new year.

The screen for this process, shown below, offers you the necessary choices. Please note that, in order to NOT bring tutors, courses and/or students across, you must tick in the appropriate box. Ticking this box does NOT cause them to be included in the copy, it causes them to be EXCLUDED.

**End-of-Year processes** Please read carefully

The end-of-year process makes a copy of your current database which can then be re-accessed at any stage. It also allows you to remove entries from the current database so that you can use it for the new year. This process can be done at any time but can only be done once.

Tick those items which you do NOT wish to have carried forward into the new year.

**Tutors**  Delete all of the tutors in the current database. (You wish to enter the new year's tutors from scratch)

**Courses and Enrolments**  Delete all of the courses and enrolments from the current database (You wish to enter all of the new year's courses (and enrolments) from scratch)

Leave course dates unchanged. Otherwise the program will have course dates adjusted to the nearest matching date in the new year.

**Students**  Delete all of the student details from the current database (You wish to enter all of the new year's students from scratch)

**N.B. All enrolments WILL be deleted for the new year**

If deleted, you will be able to bring back in tutors, courses and/or students from the previous year.

Proceed

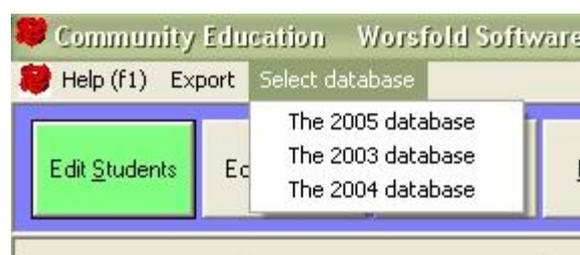
Of course the enrolments for the current year will NOT be included in the copy.

Finally, should you elect to NOT copy tutors, courses and/or students then you may, in the new year, always retrieve such information from the previous year via a button on each of the three screens. An example of this button is shown below.



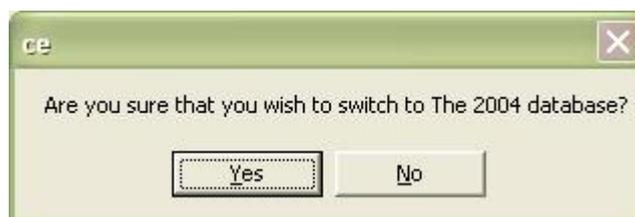
The use of this button, in each case, was detailed in the earlier chapter on data entry.

You can always revisit an early year via the 'top menu' item labelled 'Select databases', as shown below.

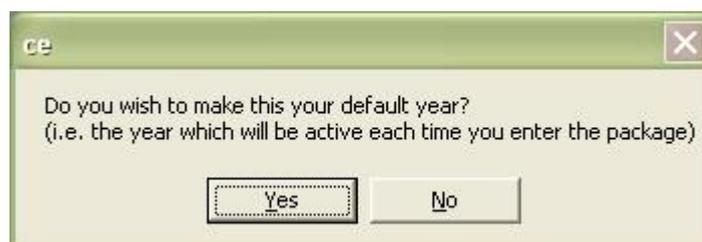


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Each time you change between databases, you will be asked two questions.



Should you elect to do so...



Regardless of the year, a large label at the top of the screen always shows which year you are currently using.



## 4.10 Course changes

From time to time a course will be cancelled and it might be necessary to change all of its students into another course. This utility allows you to do that.

The screen for this process, shown below, lists some default settings. These are :

1. If a student has NOT paid for the old course then which of the following alternatives to you wish to occur?
  - Change to the new fee
  - Leave the old fee unchanged
2. If a student has paid in full or in part for the old course then which of the following alternatives to you wish to occur?
  - Change to the new fee

- Leave the old fee unchanged
3. If, as a result, a student is now in credit, do you wish to automatically generate a credit for the balance?

**Changing courses**

This utility allows you to transfer all of the students from one course to another. You can transfer individual students by right-clicking on the course CODE on the student's screen.

In either case, the choices you make in step 1 below will apply.

Step 1 What happens to fees?

If a student has NOT paid for the old course :

- Change to the new fee
- Leave the old fee unchanged

If a student has paid in full or in part for the old course

- Change to the new fee
- Leave the old fee unchanged

If the student is now in credit do you wish to automatically generate a credit for the balance

Leave the old fee unchanged

Now that defaults are set you may make individual course changes on students by right-clicking on a students course CODE

Step 2 Move ALL student taking (select course)

| Code | Course                 |
|------|------------------------|
| M274 | ART BEGINNERS/INTERM   |
| M282 | CLASSICAL GUITAR BEGIN |
| M283 | CLASSICAL ENSEMBLE     |
| M284 | CLASSICAL GUITAR ONGC  |
| S101 | ACCESS                 |
| S103 | EXCEL INTRODUCTION     |
| S105 | EXCEL MACROS           |
| S106 | SEARCHING THE INTERNET |

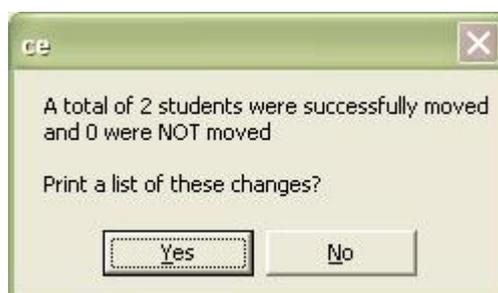
Step 3 Into course (select course)

| Code | Course                 |
|------|------------------------|
| M152 | ESOL                   |
| M167 | YOGA                   |
| M173 | ART FOR BEGINNERS      |
| M182 | CLASSICAL GUITAR BEGIN |
| M183 | CLASSICAL ENSEMBLE     |
| M184 | CLASSICAL GUITAR ONGC  |
| M236 | WOODWORK               |
| M237 | ITALIAN FOR TRAVELLERS |

Proceed to move students

Once you have made these settings then you may, via the individual student screen, switch a student from one course to another by right-clicking on the course code of the course which you wish to change.

The final step is to select the old course and the new course from the lists shown on the right hand side of the screen. Once you are satisfied with your choices, click 'Proceed to move students' and the process will take place, the results of which are reported as shown below.



## 4.11 Email database

The final utility offers you the ability to email a copy of your database directly to me. Occasionally a problem occurs which is most easily solved by sending me a copy of your database so that I can replicate the problem and hence solve it. The screen for this process is shown below.

This process may be used to email a copy of your database to Worsfold Software Ltd.

Naturally, all information contained therein is treated with the the strictest confidence.

In order to send the email you must provide your own email address and the address of your ISP (Inernet Service Provider). Your IT specialist will be able to provide you with the latter.

Your email address :

Your ISP's address :   
(e.g. smtp.xxtra.co.nz)

Accompanying message :

(Use Ctrl-Enter to move down a line)

The first entry is easy, it it's your email address. The second one is a little more difficult to determine. It is the code for your email provider. This is not an email address and probably begins with the letters 'smtp'. If you are not sure then ask your IT expert. He or she is sure to have it at their fingertips!

In the centre panel, send me a message relating to the reason for sending the database then click the 'Send' button and it will depart. It is most unlikely that I would have to send your database back to you but, in the event that this is likely, we will have discussed the situation by phone beforehand.

## 4.12 Evaluation process

The package now contains an optional evaluation process whereby you can design questionnaires, record the feedback from them and analyse the results. This topic

now has its very own chapter! There is a small charge for the inclusion of this facility. If your 'Evaluation Process' button is not visible and you wish to be able to use it then contact Worsfold Software to obtain a valid registration file which will switch it on for you.

## 4.12 Cross check student hours

The original version of this package assumed that every student took each course for all of its specified hours and the RS44 returns were based on these hours too.

More recently the ability to specify a DIFFERENT number of hours for each student was added. This means, for example, that a student can sign up for a 10-hour swimming course knowing that she will only be able to attend for three of the five two hour sessions – a total of six hours.

You can now visit the student's screen and adjust their number of hours to allow for this possibility.

This utility allows you to quickly cross check all students reporting on those whose hours for a course differ from the course's stated hours.

**Cross check student hours**

The hours for which each student takes each course are displayed on the courses table on the student data screen. This utility reports those students whose course hours do not match the nominated hours for the course. You may request to have ALL hours updated globally. Alternatively you may adjust individual hours.

Click on a title to have the column sorted alphabetically.

| Student name   | Course Code | Course Title   | Course Hours | Student Hours |
|----------------|-------------|----------------|--------------|---------------|
| Aked, Heather  | T6          | Stage 3 Guitar | 16           | 12            |
| Alsaleh, Huda  | T6          | Stage 3 Guitar | 16           | 13            |
| Aamodt, Graham | T5          | Swing Dancing  | 16           | 14            |

Set all zero student hours to course hours

Double-click on a student to have their hours set to course hours. You can also edit the hours in the last column.

Those who DO have hours specified which are more than zero are probably correct.

You have three options.

1. Use the button at the bottom of the screen to 'Set all zero student hours to course hours'.
2. Double clicking on an entry in the table will have the same effect.
3. You can simply edit the hours shown on the right hand side of the table to the correct amount.

## *Chapter 5*

### **The simple financial system**

|                                 |      |
|---------------------------------|------|
| What's in this chapter?         | Page |
| 5.1 Overview of the two systems | 5.1  |
| 5.2 The simple financial system | 5.2  |

#### **5.1 Overview of the two systems**

Community Education offers two levels of sophistication in the area of financial processes.

##### **The first is simple.**

Each courses fee is shown against each enrolled student (optionally with a separate materials fee) and you can manually enter the amount paid, the receipt number and a comment. There is no audit trail. You can print a document for a student listing details of the fee, the amount paid, and the receipt number of each of the courses for which that student is enrolled, but there is no automatic incrementing of the receipt number.

##### **The second is much more detailed.**

As above, the courses fee is shown against each student, and is initially also recorded as an unpaid debt (unless the courses itself is 'pending'). You may record the payment by the student of one or more of his or her course fees. This can optionally involve the automatic allocation and printing of the next receipt number.

You can also print invoices and statements and credit notes. An audit trail is maintained in that previous transactions cannot be altered (apart from the method of payment) and cannot be deleted from the database. Approval can be granted to allow a user to adjust the amount billed for individual students.

You can also record partial payments and refunds.

You can print financial reports of transactions between nominated dates.

## 5.2 The simple financial system

Some centres do not require a sophisticated accounting system for their Community Education, so this package offers two alternatives.

The details of each students course enrolments and payments are displayed in the bottom half of the student screen. An example is shown below.

| Code | Title                | Total Fee | Paid  | Rcpt/Inv | Comment  |
|------|----------------------|-----------|-------|----------|--|
| M282 | CLASSICAL GUITAR BEG | 45.00     | 45.00 | 13579    |  |
| M236 | WOODWORK             | 65.00     | 65.00 | R13580   | Refunded as withdrew from course before it started |

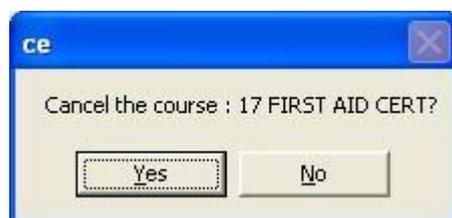
| Code | Title          | Max | Cut |
|------|----------------|-----|-----|
| M136 | WOODWORK       | 12  |     |
| M145 | ITALIAN FOR TR | 20  |     |
| M152 | ESOL           | 30  |     |
| M167 | YOGA           | 20  |     |
| M173 | ART FOR BEGIN  | 12  |     |
| M182 | CLASSICAL GUIT | 6   |     |

In the example above the student has two courses, Classical Guitar Beginners and Woodwork. The fee for the first course is \$45.00, the Student has been billed the amount \$45.00, and has paid that amount, as witnessed by the receipt number shown in the receipt column.

The fee for the second course is \$65.00, the Student has been billed the amount \$45.00, and has paid that amount, and it has been refunded as witnessed by the letter 'R' in front of the receipt number shown in the receipt column. This prevents the amount being counted in the total fees generated by this course.

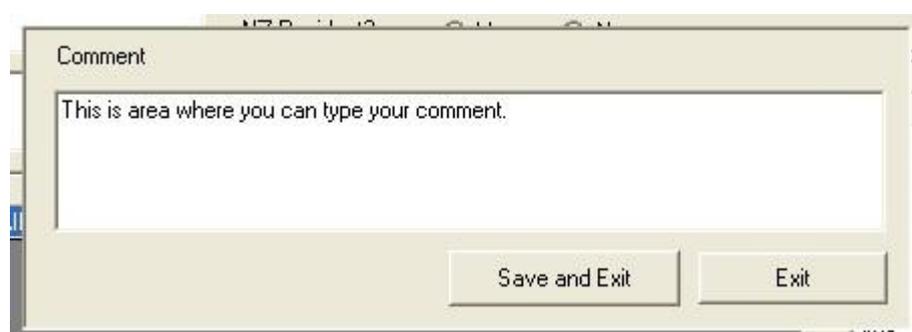
The four fields : Fee, Amount, Receipt and Comment are all editable.

If you wish to remove this course from this student then you can do so by right-clicking on the course name. The following confirmation box will appear.



If you click 'Yes' then the word 'Cancelled' will appear as the course title, and the 'Save changes' button will change colour to red. If you do 'Save changes' then, the next time you visit this student the cancelled course will no longer be listed.

If you wish to add a comment then click in the 'Comment' column and the following popup window will appear.



Type your comment and click 'Save and exit' to have your comment returned to the student's screen. This does NOT save the comment back to the database. You must still 'Save changes' on the student in order to achieve this. However, having entered a comment, the 'Save changes' button will change colour to red to prompt you to do this.

And that's about it really. It is a simple system, designed for those who do not wish to go to the trouble of maintaining a detailed financial record, involving a transaction history.



# Chapter 6

## The detailed financial system

|                                   |      |
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### 6.1 Overview of the two systems

Community Education offers two levels of sophistication in the area of financial processes.

#### **The first is simple.**

Each courses fee is shown against each enrolled student and you can manually enter the amount paid, the receipt number and a comment. There is no audit trail. You can print a document for a student listing details of the fee, the amount paid, and the receipt number of each of the courses for which that student is enrolled, but there is no automatic incrementing of the receipt number.

#### **The second is much more detailed.**

As above, the courses fee is shown against each student, and is initially also recorded as an unpaid debt (unless the courses itself is 'pending'). You may record the payment by the student of one or more of his or her course fees. This can optionally involve the automatic allocation and printing of the next receipt number. You can also print invoices and statements and credit notes. An audit trail is maintained in that previous transactions cannot be altered (apart from the method of payment) and cannot be deleted from the database. Approval can be granted to allow a user to adjust the amount billed for individual students.

You can also record partial payments and refunds.

You can print financial reports of transactions between nominated dates.

## 6.2 The detailed financial system

Some centres require a more detailed financial system which includes the ability to print receipts, maintain an audit trail, and allows for refunds and part payments. This chapter details the processes involved in the more sophisticated version of the financial processes.

The transaction screen is where the difference appears.

The screenshot shows a financial system interface. On the left, there is a form with fields for 'Date', 'C. Code', 'Title', 'Course', 'Materials', 'Total Fee', 'Db Amnt', 'Cr Amnt', 'Rcpt/Inv', 'Print?', 'Method', 'hours', and 'Comment'. Below the form are buttons for 'Print' and 'Undo'. On the right, there is a list of courses with columns for 'Code', 'Title', 'Max', 'Curr', and 'W'. The table below shows the following data:

| Date       | C. Code | Title                 | Course | Materials | Total Fee | Db Amnt | Cr Amnt | Rcpt/Inv | Print? | Method | hours | Comment |
|------------|---------|-----------------------|--------|-----------|-----------|---------|---------|----------|--------|--------|-------|---------|
| 19/01/2008 | T6      | Stage 3 Guitar        |        | 45.00     | 45.00     | 45.00   | 0.00    |          |        |        | 16    |         |
| 23/01/2008 | T5      | Swing Dancing         |        | 45.00     | 45.00     | 45.00   | 0.00    |          |        |        | 14    |         |
| 23/01/2008 | T7      | Te Reo Me ona Tikanga |        | 45.00     | 45.00     | 45.00   | 0.00    |          |        |        | 16    |         |

Below the table, there are buttons for 'Hide cancelled courses', 'Paid in full \$135.00', 'Import 2006 students', 'Add a new student', 'Delete the selected student', 'Save changes', 'Reconcile', 'Search', '< Back', and 'Next'.

Note that the 'Hours' column displays the number of hours for which the student is enrolled in the course. This may, in certain circumstances, be fewer than the normal number of hours for the course (e.g. where a student cannot attend for the full course but wishes to attend for part of it).

Please note that, since this chapter was first written, fees have been split into Course fee and Materials fee. The following screen captures do NOT show this change but are otherwise completely identical to the current display.

Below the table are three (and sometimes four) extra buttons. The 'Undo' button on the left restores the student's screen to its appearance before the last time changes were saved. It simply reloads the current student's enrolment details from the database.

The 'Hide cancelled courses' button does just that and the 'Paid in full' button allows you to quickly recognise full payment of all debts - more on each of these later.

Above this area, and to the right, are two details reporting the total debits (fees billed and refunds issued) to this student and the total credits (payments received and credits issued).

|              |          |               |         |
|--------------|----------|---------------|---------|
| Total debits | \$155.00 | Total credits | \$90.00 |
|--------------|----------|---------------|---------|

On a screen resolution of 800 x 600 the transaction screen itself has more columns than just those visible in the illustration above. By sliding the horizontal slide to the right the other columns come into view, leaving the left hand four columns 'frozen'.

| Date       | C | Code | Title               | Rcpt                                | Method | Comment |
|------------|---|------|---------------------|-------------------------------------|--------|---------|
| 22/03/2003 |   | 40   | EMBROIDERY (DAY)    |                                     |        |         |
| 22/03/2003 |   | 40   | Payment             | <input checked="" type="checkbox"/> | Cash   |         |
| 22/03/2003 |   | 54   | Intro Internet      |                                     |        |         |
| 22/03/2003 |   | 57   | DESK TOP PUBLISHING |                                     |        |         |
| 22/03/2003 |   | 57   | Payment             | <input checked="" type="checkbox"/> | Cash   |         |
| 22/03/2003 |   | 54   | Payment             | <input checked="" type="checkbox"/> | Cash   |         |
| 23/03/2003 |   | 70a  | Shiatsu             |                                     |        |         |
| 23/03/2003 |   | 70b  | Shiatsu             |                                     |        |         |

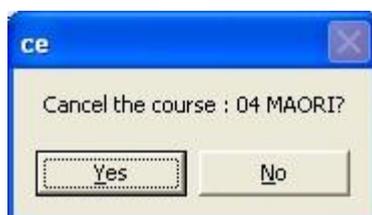
OK. Let's now turn to a student where they have been enrolled for one course, Maori, for which the fee is \$15.00 and the student has a debt of \$15.00.

| Date       | C | Code | Title | Fee   | Db Amnt | Cr Amnt | Rcpt/Inv |
|------------|---|------|-------|-------|---------|---------|----------|
| 06/04/2003 |   | 04   | MAORI | 15.00 | 15.00   | 0.00    |          |

If you click on the item, a button will appear below captioned 'Paid \$15.00'. We'll return to this button in a moment.

| Date       | C | Code | Title | Fee   | Db Amnt | Cr Amnt | Rcpt/Inv |
|------------|---|------|-------|-------|---------|---------|----------|
| 06/04/2003 |   | 04   | MAORI | 15.00 | 15.00   | 0.00    |          |

To cancel a course, you simple right-click on its title. The following message box will appear.



If you DO cancel the course than a 'C' will appear in the narrow second column from the left.

To re-instate a cancelled course, right-click on its title and you'll be offered the chance to cancel the cancellation.

You cannot alter the 'Method' of a debt. Method applies only to payments.



How do you process a payment? There are three ways you can do this.

1. Right-click on the debit amount
2. Select the item then click the 'Paid \$x.xx' button.
3. Click the 'Paid in full button.'

The 'Paid in full' button is simplest when a student has paid in full. It is possible to select more than one course which has been paid. The second 'Paid' button will reflect the selected courses. The first option is simple where there is but one paid course.

Whichever of these you select, the following screen will appear.

**Payment options**

Amount of payment: 15.00

Payment method: Cheque  
Cash  
Credit card  
EFTPOS  
Auto payment

Receipt number: 76

Receipt design: Receipt 1

Proceed (and print receipt)

Proceed (without printing receipt)

N.B. Either of the two buttons above will cause the changes to be saved back to the database.

Cancel

You can, if necessary, reduce the amount paid by editing the amount shown at the top.

You can select the 'Method' of payment. If you select 'Cheque' then a further data-entry field will appear wherein you may enter the cheque number. (This will later appear on your banking list...)

Payment method: Cheque  
Cash  
Credit card  
EFTPOS  
Auto payment

Cheque number: 4466778899

Next you can decide whether or not you are going to print a receipt. Enter the receipt number (which will automatically increment, based on the default setting made via 'Utilities') Any change you make here will become the new base number.

Finally, select one of three buttons. The third cancels the whole process and returns you to the transaction screen - unaltered.

The other two process the transaction with or without a receipt being printed. In either case, if a receipt number is allocated to the transaction then the results will be AUTOMATICALLY SAVED back to the database. The Undo button will then not work. The receipt number is 'committed' to the audit trail.

| Date       | C | Code | Title   | Fee   | Db Amnt | Cr Amnt | Rcpt/Inv |
|------------|---|------|---------|-------|---------|---------|----------|
| 06/04/2003 |   | 04   | MAORI   | 15.00 | 15.00   | 0.00    |          |
| 06/04/2003 |   | 04   | Payment | 15.00 |         | 15.00   |          |

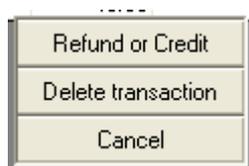

The screen above illustrates the result of a straight forward payment. A new transaction is generated, recognising the transaction. The course code is that saved of course (sorry...), but the title is 'Payment' and the Credit amount is the amount paid.

| Date       | C | Code | Title   | Rcpt/Inv | Rcpt | Method | Commei |
|------------|---|------|---------|----------|------|--------|--------|
| 06/04/2003 |   | 04   | MAORI   |          |      |        |        |
| 06/04/2003 |   | 04   | Payment | 76       |      | Cash   |        |

Sliding to the other columns you'll see that the receipt number has been recorded, as has been the method. If payment had been made by cheque then the cheque number would have been recorded in the comment area.

You will notice the receipt number (76) alongside which is an empty column. If we had printed the receipt then a tick would have appeared in that column. Thus you can easily identify which receipts have been printed and which have not. Unprinted receipts can be printed via the 'Utilities' button.

So now we have a paid course fee. How do you do a refund? You right-click on the paid amount and the following menu box will appear.



The first option is the one in which we are interested. The second does allow you to completely delete a payment transaction. While this is not a good thing from an audit

trail point of view it does, never-the-less, allow you to quickly correct a mistake – such as recording a payment on the wrong student. However, if you proceed with the credit then the following screen will appear.

**Credit / Refund options**

Amount of credit

Next credit note number

Has this credit been refunded (paid out)?  Yes  No

Cancel this enrolment too

Details

Credit note design

Proceed (and print Credit Note)

Proceed (without printing Credit Note)

N.B. Either of the two buttons above will cause the changes to be saved back to the database.

Cancel

You can edit the amount of the refund at the top of this screen and can enter an explanation for the refund in the 'details' area. The credit note number, which will be recorded if the credit note is printed, is confirmed next along with the decision as to whether or not it has been paid out.

You have the opportunity to indicate whether or not the student has actually been withdrawn from the course. This may be managed separately later if necessary but, by signalling it at this point it is one fewer things to remember to do later.

If you do NOT pay out the refund then ONE new transaction is created, as shown below...

| Date       | C | Code | Title   | Fee   | Db Amnt | Cr Amnt | Rcpt/Inv |
|------------|---|------|---------|-------|---------|---------|----------|
| 06/04/2003 |   | 04   | MAORI   | 15.00 | 15.00   | 0.00    |          |
| 06/04/2003 |   | 04   | Payment | 15.00 |         | 15.00   |          |
| 06/04/2003 |   | 04   | Credit  |       |         | 15.00   | Credit   |

| Rcpt/Inv | Rcpt | Method | Commer |
|----------|------|--------|--------|
|          | 76   | Cash   |        |
|          |      |        | Credit |

... leaving the student with a credit balance (relating to course number 04).

If, instead, you DO pay the money back then two further transactions are generated.

| Date       | C | Code | Title   | Fee   | Db Amnt | Cr Amnt | Rcpt/Inv |
|------------|---|------|---------|-------|---------|---------|----------|
| 06/04/2003 |   | 04   | MAORI   | 15.00 | 15.00   | 0.00    |          |
| 06/04/2003 |   | 04   | Payment | 15.00 | 0.00    | 15.00   |          |
| 06/04/2003 |   | 04   | Credit  |       |         | 15.00   | Credit   |
| 06/04/2003 |   | 04   | Refund  |       | 15.00   |         | Refund   |

| Rcpt/Inv | Rcpt | Method | Commer |
|----------|------|--------|--------|
|          | 76   | Cash   |        |
|          |      |        | Credit |
|          |      |        | Refund |

These are the credit leg, where the credit amount is generated, followed by the refund leg where the student's net credit is reduced by the amount of the payment. The 'details' entered via the screen are recorded against both legs.

That covers the basics. Let's now deal with a multiple part-payment. The student below has enrolled for five courses.

| Date       | C Code | Title     | Fee   | Db Amnt | Cr Amnt | Rcpt/Inv |
|------------|--------|-----------|-------|---------|---------|----------|
| 06/04/2003 | 01     | GERMAN    | 25.00 | 25.00   | 0.00    |          |
| 06/04/2003 | 02     | NZ SIGN   | 5.00  | 5.00    | 0.00    |          |
| 06/04/2003 | 03     | ITALIAN   | 25.00 | 25.00   | 0.00    |          |
| 06/04/2003 | 04     | MAORI     | 15.00 | 15.00   | 0.00    |          |
| 06/04/2003 | 05     | ITALIAN 2 | 25.00 | 25.00   | 0.00    |          |

Cancelled courses      Paid in full \$95.00

Lets assume that her or she (we really need a new word here. 'He or she' is cumbersome and 'they' doesn't feel right somehow. So how about 'hesh' or 'heshe'?) has paid for their NZ Sign and Maori enrolments.

| Date       | C Code | Title     | Fee   | Db Amnt | Cr Amnt | Rcpt/Inv |
|------------|--------|-----------|-------|---------|---------|----------|
| 06/04/2003 | 01     | GERMAN    | 25.00 | 25.00   | 0.00    |          |
| 06/04/2003 | 02     | NZ SIGN   | 5.00  | 5.00    | 0.00    |          |
| 06/04/2003 | 03     | ITALIAN   | 25.00 | 25.00   | 0.00    |          |
| 06/04/2003 | 04     | MAORI     | 15.00 | 15.00   | 0.00    |          |
| 06/04/2003 | 05     | ITALIAN 2 | 25.00 | 25.00   | 0.00    |          |
| 06/04/2003 | 03     | Payment   | 25.00 | 0.00    | 10.00   |          |

Cancelled courses      Paid in full \$85.00      Paid \$20.00

Select the two paid courses by holding down the Control key as you click on each. Once you have done this, the second 'Paid' button will show the total \$20.00 being the total of the two unpaid courses you have selected. If you select a course which has already been paid then its fee will not be added to the total.

The final way of registering a payment is to simply right-click on the debit amount. The following two-purpose window will appear.

The left hand side of the window may be used to process the payment in the usual way, as described above. This is the same window which appear when you process a payment using either of the methods detailed above, but, in this case, the right hand side of the window is hidden.

The right hand side of this window may be used to print an invoice for the amount due.

**Payment options**

| <b>Either process a payment</b>  | <b>or print an invoice</b>                                 |
|--|--|
| Amount of payment <input type="text" value="45.00"/>   | Amount of invoice <input type="text" value="45.00"/>       |
| Payment method<br><input type="list" value="EFTPOS"/><br>Cheque<br>Cash<br>Credit card<br>Auto payment<br>VISA<br>Mastercard |  |
| Receipt number <input type="text" value="13445"/>  | Invoice number <input type="text" value="44221"/>          |
| Receipt design <input type="text" value="Receipt 1"/>  | Invoice design <input type="text" value="Invoice 1"/>      |
| <input type="button" value="Proceed (and print receipt)"/>   | <input type="button" value="Proceed to print an invoice"/> |
| <input type="button" value="Proceed (without printing receipt)"/>  |  |
| <b>N.B. Either of the two buttons above will cause the changes to be saved back to the database.</b>                         |  |
| <input type="button" value="Cancel"/>  |  |

What else can be done?

### 1. Reprinting receipt and credit notes

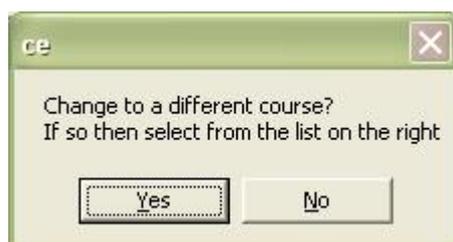
You can reprint a receipt or a credit note by right-clicking on the receipt/credit note number.

The following small message will appear, via which clicking 'Yes' will cause the receipt to be reprinted.



## 2. Changing courses.

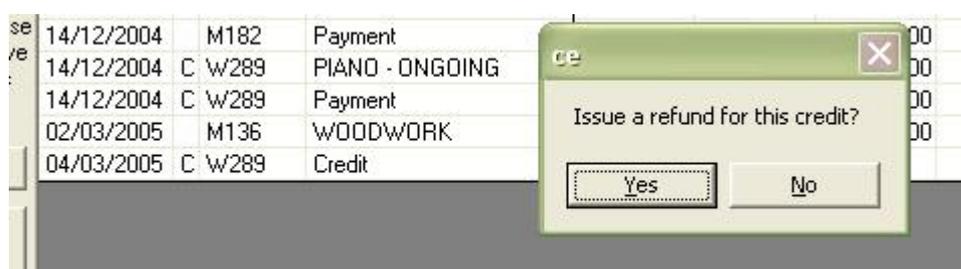
If you right-click on the course code in the debit leg then the following dialogue will appear via which you can change the student to a different course.



If you elect to proceed then the course selection panel (at the right hand side of the screen will slide out from which you should select the new course. Once the selection is made, the enrolment will change to reflect the new course, with an automatic note to report the change in the comment field. The rules which you have specified via the course change default (under Utilities) will apply, and, if you have so indicated, and a credit results from the change then a transaction line will be automatically generated to report that too.

## 3. Refunding a credit balance

If a student has a credit balance which has not been paid out, then you may process the payment of the refund by right-clicking on the word 'Credit' on the student's screen. The following message will appear, asking you to confirm your intention.

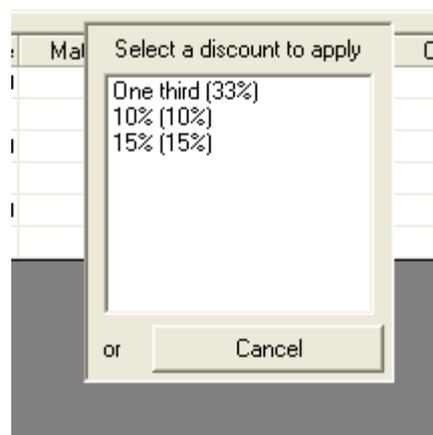


## 4. Printing a statement

It is possible to print a statement for the current student via the 'Print' button to the left of the enrolments table. Select your statement design from the list which will appear and a statement will be printed.

## 5. Applying a discount

You can apply a discount to a particular course fee by right-clicking on the fee. A discount window will appear, offering the list of possible discounts (which were set up via Utilities / Financial defaults). An example of this window is shown below.



The discount will be calculated and the fee amount will be altered to the new amount. An automatic message is entered via the 'Comment' field to record what has happened. An example of this is shown below.

|  |       |  |       |       |       |      |  |  |  |  |  |  |                             |
|--|-------|--|-------|-------|-------|------|--|--|--|--|--|--|-----------------------------|
|  | 58.50 |  | 45.00 | 58.50 | 58.50 | 0.00 |  |  |  |  |  |  | Discount on fee : 10% (10%) |
|--|-------|--|-------|-------|-------|------|--|--|--|--|--|--|-----------------------------|

That brings us to the end of the detailed financial processes. Remember to visit both the 'Printing' area (for financial lists) and 'Utilities' for printing financial documents (Invoices, Statements and unprinted receipts)

## 6. Using a credit balance to pay for a course fee.

If a student is in credit (due to a credit being issued against one course) and has a debt from another course then the 'Reconcile' button may be used to use some or all of the credit to pay for some or all of the outstanding debt.

| Date       | C Code | Title                 | Course | Materials | Total Fee | Db Amnt | Cr Amnt | Rcpt/Inv  | Print? | Method      | hours | Comment         |
|------------|--------|-----------------------|--------|-----------|-----------|---------|---------|-----------|--------|-------------|-------|-----------------|
| 19/01/2008 | T6     | Stage 3 Guitar        | 40.00  |           | 40.00     | 40.00   | 0.00    |           |        |             | 16    |                 |
| 23/01/2008 | C T5   | Swing Dancing         | 45.00  |           | 45.00     | 45.00   | 0.00    |           |        |             | 14    |                 |
| 23/01/2008 | T7     | Te Reo Me ona Tikanga | 45.00  |           | 45.00     | 45.00   | 0.00    |           |        |             | 636   |                 |
| 23/01/2008 | C T5   | Payment               |        |           | 45.00     |         | 45.00   | CER1002   |        | Cash        |       |                 |
| 23/01/2008 | C T5   | Credit                |        |           | 0.00      |         | 45.00   | CNCEC1001 |        | Credit Note |       | Demo for manual |

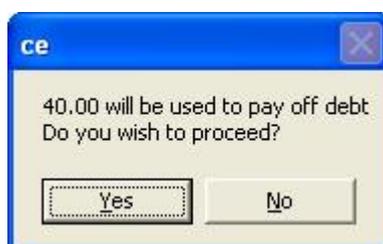
In the example above the student has a credit of \$45.00 (the last item) (Due to a refund of the fees for 'Swing Dancing') and still has an unpaid debt of \$40.00 on

'Stage 3 Guitar'. To use the credit to pay the debt highlight BOTH of the transactions, the unallocated credit and the unpaid debt, and click on the 'Reconcile' button at the bottom of the screen.

| Date       | C Code | Title                 | Course | Materials | Total Fee | Db Amnt | Cr Amnt | Rcpt/Inv  | Prnt? | Method      | hours | Comment         |
|------------|--------|-----------------------|--------|-----------|-----------|---------|---------|-----------|-------|-------------|-------|-----------------|
| 19/01/2008 | T6     | Stage 3 Guitar        | 40.00  |           | 40.00     | 40.00   | 0.00    |           |       |             | 16    |                 |
| 23/01/2008 | C T5   | Swing Dancing         | 45.00  |           | 45.00     | 45.00   | 0.00    |           |       |             | 14    |                 |
| 23/01/2008 | T7     | Te Reo Me ona Tikanga | 45.00  |           | 45.00     | 45.00   | 0.00    |           |       |             | 636   |                 |
| 23/01/2008 | C T5   | Payment               |        |           | 45.00     |         | 45.00   | CER1002   |       | Cash        |       |                 |
| 23/01/2008 | C T5   | Credit                |        |           | 0.00      |         | 45.00   | CNCEC1001 |       | Credit Note |       | Demo for manual |

N.B. To highlight more than one transaction you have to hold down the Cntrl key when you click on the second.

After clicking 'Reconcile' you will receive a message such as that shown below.

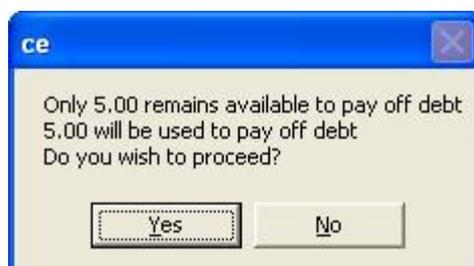


Click 'Yes' and then situation changes to :

| Date       | C Code | Title                 | Course | Materials | Total Fee | Db Amnt | Cr Amnt | Rcpt/Inv  | Prnt? | Method      | hours | Comment                 |
|------------|--------|-----------------------|--------|-----------|-----------|---------|---------|-----------|-------|-------------|-------|-------------------------|
| 19/01/2008 | T6     | Stage 3 Guitar        | 40.00  |           | 40.00     | 40.00   | 0.00    |           |       |             | 16    |                         |
| 23/01/2008 | C T5   | Swing Dancing         | 45.00  |           | 45.00     | 45.00   | 0.00    |           |       |             | 14    |                         |
| 23/01/2008 | T7     | Te Reo Me ona Tikanga | 45.00  |           | 45.00     | 45.00   | 0.00    |           |       |             | 636   |                         |
| 23/01/2008 | C T5   | Payment               |        |           | 45.00     |         | 45.00   | CER1002   |       | Cash        |       |                         |
| 23/01/2008 | C T5   | Credit                |        |           | 0.00      |         | 45.00   | CNCEC1001 |       | Credit Note |       | Demo for manual - n     |
| 24/01/2008 | C T5   | Swing Dancing         |        |           | 0.00      | 40.00   | 0.00    | CNCEC1001 |       |             |       | 0 paid out - used to pe |
| 24/01/2008 | T6     | Payment               |        |           | 40.00     |         | 40.00   |           |       | Journal     |       | Paid via credit from    |

Two new transactions have appeared being the two legs of the new transaction. \$40.00 has been paid by journal from one course to the other.

Should you attempt to reuse the credit of \$45.00 to pay e.g. the \$45.00 debt still unpaid on 'Te Reo Me ona Tikanga' then a message such as that shown below will appear.





# *Chapter 7*

## **The Evaluation Process**

|  |      |
|--|------|
| What's in this chapter?                  | Page |
| 7.1 Overview of the process              | 7.1  |
| 7.2 Design a questionnaire               | 7.1  |
| 7.3 Record replies from students         | 7.1  |
| 7.4 Analyse the results of the responses | 7.1  |

### **7.1 Overview of the process**

This utility was originally developed in response to requests from people who wishes to record the responses from students would had filled in end-of-course questionnaires concerning various aspects of the course which they had just completed. The process allows you to :

1. Design a questionnaire.  
This step is necessary to let the program know what the questions are at what form their replie(s) take.
2. Record replies from students taking Adult and Community Education classes.
3. Analyse the results of the responses.

The utility has now been turned into a 'stand-alone' program which can operate independently of the ComEd package. It can now be used at a higher level within the school to survey not only ComEd courses, but also Star courses, option classes, form classes etc etc.

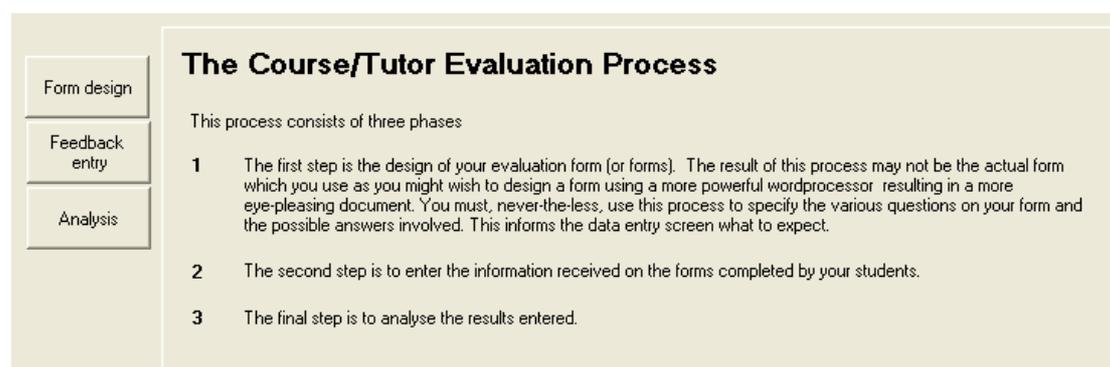
At this point we are concerned with the utility as it is, built in to ComEd. However, rather than maintain two separate manuals for the built-in version and the stand-alone version, the notes which follow contain an number of illustrations which relate to the stand-alone version. There are a few minor differences when working with the

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ComEd version – namely, e.g. that the ComEd courses are available for selection.

Click on the 'Evaluation Process' button and the following screen will appear.

Either click on this screen or wait a few moments. In either case it will disappear and be replaced by the main program screen listing the three basic processes involved in the utility.



**The Course/Tutor Evaluation Process**

This process consists of three phases

- 1 The first step is the design of your evaluation form (or forms). The result of this process may not be the actual form which you use as you might wish to design a form using a more powerful wordprocessor resulting in a more eye-pleasing document. You must, never-the-less, use this process to specify the various questions on your form and the possible answers involved. This informs the data entry screen what to expect.
- 2 The second step is to enter the information received on the forms completed by your students.
- 3 The final step is to analyse the results entered.

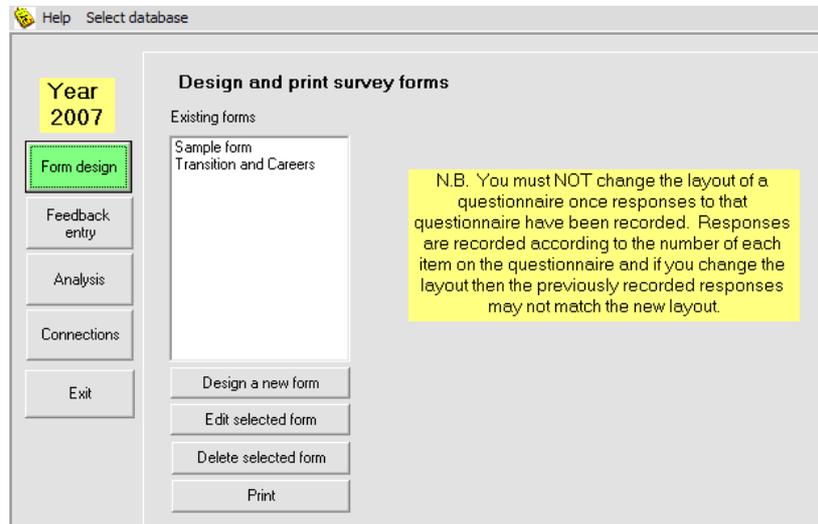
## 7.2 Design a questionnaire

The first step is to design your course questionnaire which students complete at the end of their course. You may have already done this but, to let the package know what questions have been asked and in what form the answers will appear, you have to enter the details of your form into the program. You might like the results so much that you do, in fact, use the resulting form as your course questionnaire.

Clicking on the 'Form design' button will take you to the screen below, where previously designed forms will be displayed. There will be one form 'Sample form' already there which provides an example of the package use.

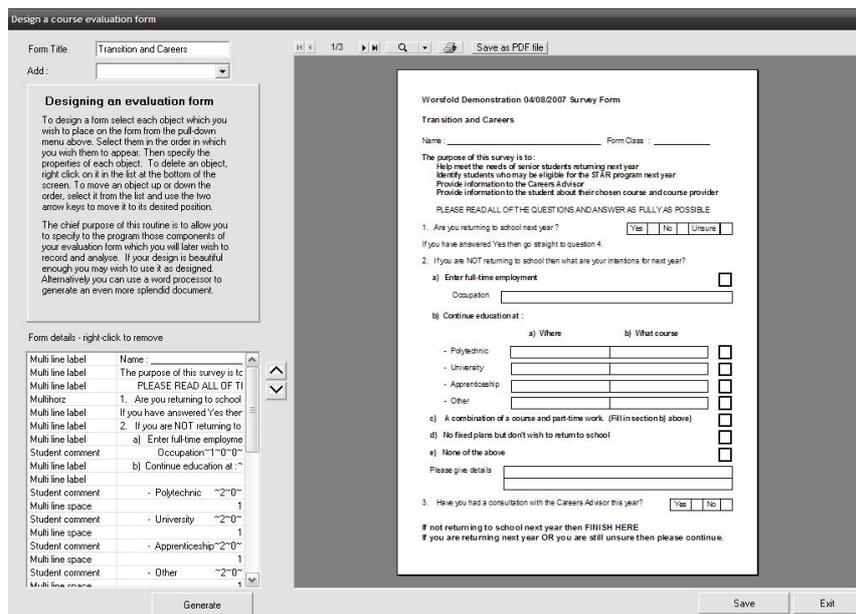
The stand-alone version has a second example 'Transition and Careers' and it is this form which will be used herein to illustrate each of the possible types of questions which may be included in the questionnaire.

N.B. In the ComEd version there is no fourth 'Connections' button.



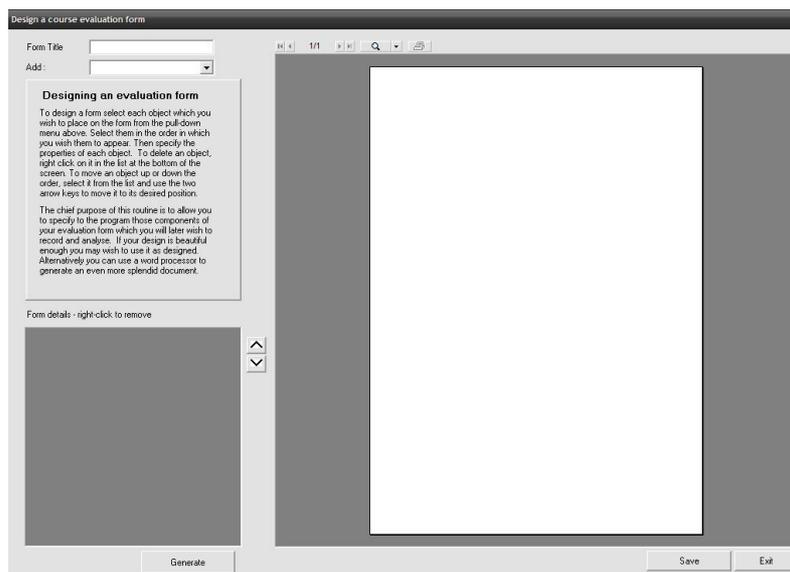
Please note the message in the yellow panel on the screen above! It's quite important.

If you select 'Transition and Careers' then click on the 'Edit selected form' button and you will arrive at the next screen, shown below, which displays the form in its design stage.

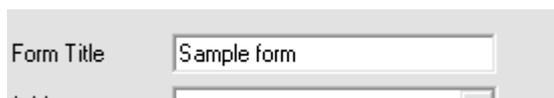


However, for the purposes of instruction, let's return to design a new form from scratch. To do this, click on the 'Exit' button and then select 'Design a new form'.

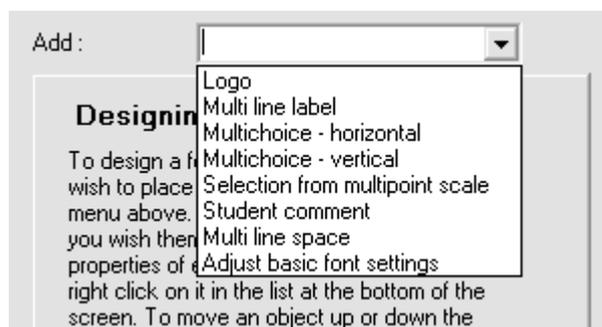
This time you will begin with a blank form, as shown below.



Give your new form a title by entering it in the space at the top of the left hand column.



Next, using the popup menu in the top left hand corner of the screen you can add a logo, labels, multichoice questions (both horizontal and vertical), multipoint scales, student comments – and you can insert spaces between the sections and adjust the font used.



### 1. Adding a logo

Ensure that your required logo has been copied into your \survey directory.



Select 'Logo' from the popup menu and the following dialogue will appear on the left hand side of the screen. Initially, all of the bitmaps (.bmp files) in your current directory will be listed. You can change the file type by entering your own choice in the space provided.

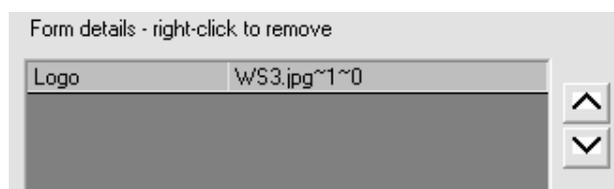
Select your logo and decide on its alignment and its position on the document (either at the top, or at the position you were at when you added the logo. This means that you can, if you so wish, add a picture part way through the design.)



For this demonstration I've entered '\*.jpg' as the filter, causing one .jpg file to be displayed. This has been selected. After clicking 'Proceed' it appears on the design as shown.



Once you have added an item to the form you will see it listed at the bottom left hand side of the screen. You can always return to adjust a previous addition by selecting it from this list.



## 2. Adding a label

Next we'll add a label – to indicate the purpose of this document. The dialogue for this process is as shown below along with the resulting label. Labels may be added at any point where you wish to add notes or explanatory comments or headings.

**A label**

Enter the required label (Ctrl-Enter = new line)

Font size

Font Bold Yes  No

Add a tick box on the left of the label

Add a tick box to the right of the label

Shaded background

Exclude from feedback screen

Proceed

Labels may be one or more lines long. (Press Ctrl-Enter to begin a new line). You may also select the font size and bold option.

You may have a tick box at the left hand end of the label or at the right hand end or at both ends! Labels may have a shaded background.

Labels may or may not be excluded from the feedback screen. When entering responses to questionnaires you may wish to display only the relevant 'question' parts of the questionnaire on the response entry screen. If you do NOT need to have the label shown at this stage then exclude it now.

As an example of a label with a tick box the following has been entered.

**A label**

Enter the required label (Ctrl-Enter = new line)

This is a label with a tick box. Tick here if you've read the label.

Font size 12

Font Bold Yes  No

Add a tick box on the left of the label

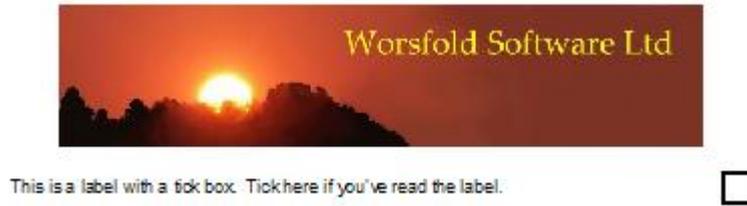
Add a tick box to the right of the label

Shaded background

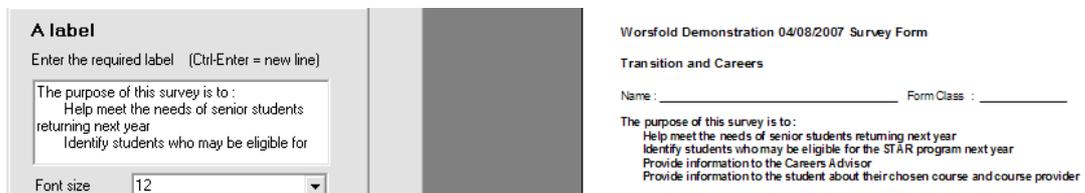
Exclude from feedback screen

Proceed

The result on the questionnaire is as shown:

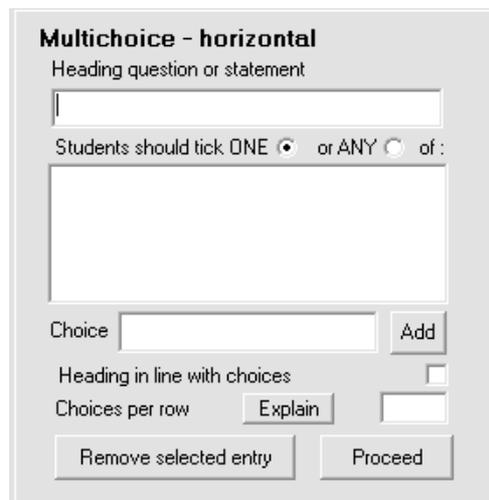


Labels may become quite complicated, particularly if they are multi-line. Use blank spaces to offset the various parts of the label, as shown in the following illustration.



### 3. A horizontal multichoice

This version of the multi-choice question has a number of alternative display additions:



Firstly, specify the question and whether students may select only one or more than one of the alternatives you are about to provide.

To add the choices, type each in the 'Choice' space below and press the Enter key – or click on the 'Add' button. You can remove unwanted choices using the suitably labelled button.

The heading will, by default, be above the choices. If you wish to have the heading on the same line then make that selection via the relevant tick box.

If you have a large number of choices then you may wish to have them presented in more than one row. Indicate this by specifying the number of choices per row. If left blank then all choices will be in the same row.

The screenshot shows a configuration window titled "Multichoice - horizontal". It contains the following elements:

- A text field for the heading: "What was the colour of the tutor's tie?"
- Radio buttons for "Students should tick ONE" (selected) and "or ANY".
- A list box containing the choices: Purple, Yellow, Pink, Blue, Red, Green.
- An "Add" button next to a "Choice" text field.
- A checkbox for "Heading in line with choices" (unchecked).
- An "Explain" button and a text field for "Choices per row".
- "Remove selected entry" and "Proceed" buttons at the bottom.

The above entries result in the following display.

The rendered question is displayed as follows:

What was the colour of the tutor's tie?

|        |        |      |      |     |       |  |
|--------|--------|------|------|-----|-------|--|
| Purple | Yellow | Pink | Blue | Red | Green |  |
|--------|--------|------|------|-----|-------|--|

#### 4. A vertical multichoice

The process is almost identical to that for a horizontal multichoice :

**Multichoice - vertical**  
Heading question or statement  
Which of the following is true?  
The student should tick ONE of the following  
The tutor was male  
The tutor was female  
Not sure  
Choice  Add  
Remove selected entry Proceed

But the resulting display on the form is a little different, the choices being listed vertically :

Which of the following is true?

|                      |                          |
|----------------------|--------------------------|
| The tutor was male   | <input type="checkbox"/> |
| The tutor was female | <input type="checkbox"/> |
| Not sure             | <input type="checkbox"/> |

## 5. Adding a multi-point scale

Initially, we'll ignore the suggestion concerning a suitable label on the following dialogue screen as that will allow us to demonstrate a different feature shortly.

**Selection from multipoint scale**  
Heading question or statement  
How would you rate the course content?  
Number of points on scale   
You may wish to use a label above the first of these questions to indicate the meanings of the values e.g.  
1 = Poor, 5 = Excellent  
Proceed

With the resulting question appearing as :

|  |   |   |   |   |   |   |   |   |   |    |
|--|---|---|---|---|---|---|---|---|---|----|
| How would you rate the course content? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--|---|---|---|---|---|---|---|---|---|----|

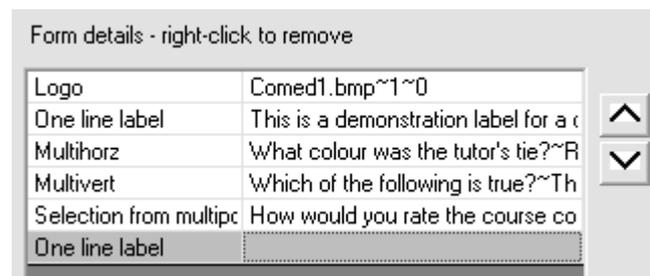
The need for a suitable label is now obvious, so we'll add one, juggling the number of blank spaces used to fit the appearance of the question.

Now, a label has been added ...

|  |   |   |   |   |   |   |   |   |   |    |
|--|---|---|---|---|---|---|---|---|---|----|
| How would you rate the course content? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--|---|---|---|---|---|---|---|---|---|----|

1 = very poor                      10 = outstanding

... but we'd prefer to have the label above the question. To do this, select the label (the last entry) from the list of objects on the form, and use the 'Up' button to the right of the list to raise the selected object by one place.



The result is extremely satisfying :

1 = very poor                      10 = outstanding

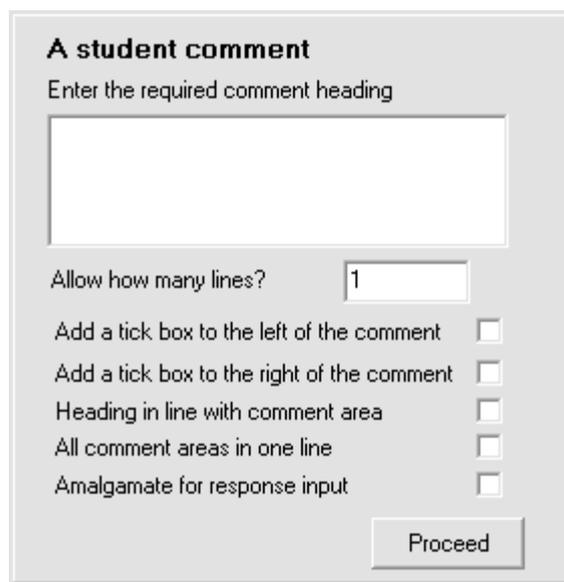
|  |   |   |   |   |   |   |   |   |   |    |
|--|---|---|---|---|---|---|---|---|---|----|
| How would you rate the course content? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--|---|---|---|---|---|---|---|---|---|----|

---

The normal practice might be to place ONE such label at the head of a series of multi-point questions.

#### 6. A student comment

The dialogue for adding a comment area is as shown below....



**A student comment**  
Enter the required comment heading

Allow how many lines? 1

Add a tick box to the left of the comment

Add a tick box to the right of the comment

Heading in line with comment area

All comment areas in one line

Amalgamate for response input

Proceed

His has several options.

- a) You may allow more than one line for the respondent to reply.
- b) You may have tick boxes to the left, to the right or at both ends of the comment area.
- c) The heading may be above (by default) or in the same line as the response area.
- d) If you specify multiple lines then the multiple areas may be arranged vertically (by default) or all in the same line.
- e) You may elect to have multiple lines treated as a single response when entering replies from respondents.

A relatively simple example is shown below, consisting of three lines in which students may request other courses.

What others courses, related to this one, would you like to have our centre provide?

|  |
|--|
|  |
|  |
|  |

In this case, due to the nature of the question, the last option, to have all three responses treated as a single reply, has been ticked.

7. Multi-line space.

Our form is a little cramped ...

Which of the following is true?

|                      |  |
|----------------------|--|
| The tutor was male   |  |
| The tutor was female |  |
| Not sure             |  |

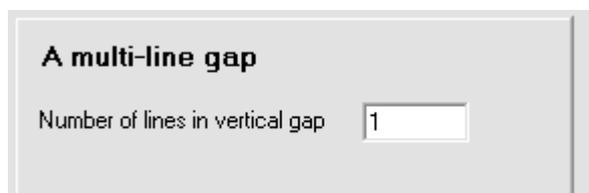
1 = very poor                      10 = outstanding

|  |   |   |   |   |   |   |   |   |   |    |
|--|---|---|---|---|---|---|---|---|---|----|
| How would you rate the course content? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--|---|---|---|---|---|---|---|---|---|----|

What others courses, related to this one, would you like to have our centre provide?

|  |
|--|
|  |
|  |
|  |

... so two multi-line spaces (each of two spaces) will be added and moved to their correct positions (by using the up arrow) between the existing objects. The dialogue to add a multi-line space is as shown :



... and the resulting layout now appears as :

Which of the following is true?

|                      |  |
|----------------------|--|
| The tutor was male   |  |
| The tutor was female |  |
| Not sure             |  |

← Space added here

1 - very poor                      10 - outstanding

How would you rate the course content?

|   |   |   |   |   |   |   |   |   |    |
|---|---|---|---|---|---|---|---|---|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|---|---|---|---|---|---|---|---|---|----|

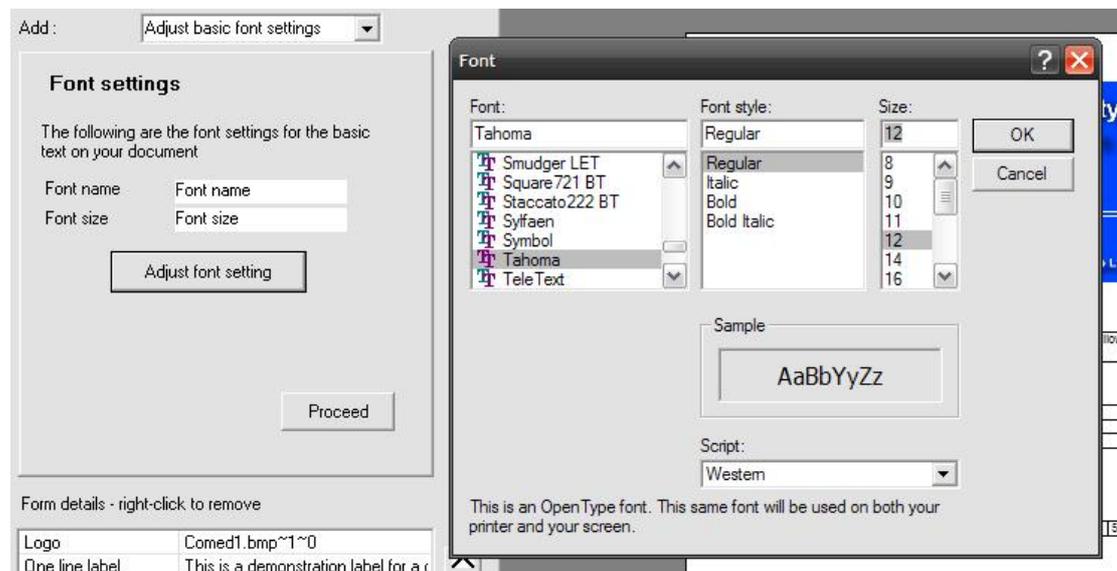
← Space added here

What other courses, related to this one, would you like to have our centre provide?

|  |
|--|
|  |
|  |
|  |

### 8. Adjust basic font settings

Use this process to select the font for your form. Click on the button 'Adjust font settings' which appears on the form and the font selection dialogue, shown below, will appear.



Make your selection, and the font selected will be applied to the form, an example of which is shown below. Note that some spacings might need to be adjusted.

This is a demonstration label for a questionnaire

This completes the process of designing the form. Make sure that you have given your new form a name and have 'Saved' it.

You can, of course design as many different forms as you like.

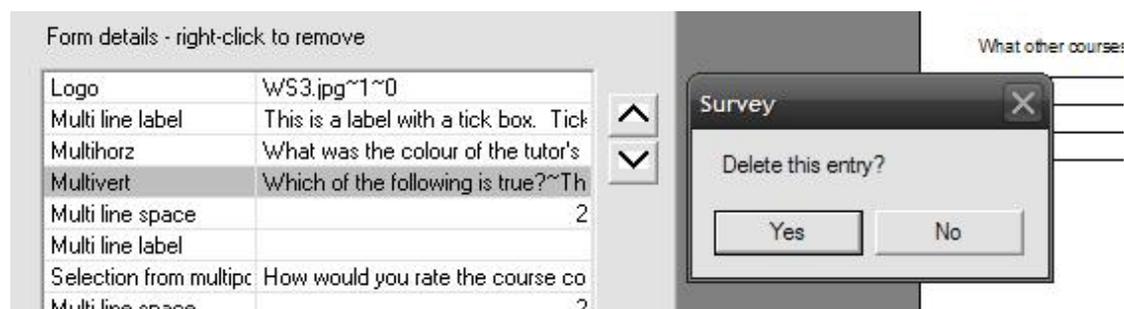
You can print your form either by clicking on the print button at the top of the form display area :



Or by clicking on the 'Save as a PDF file' button, which allows you to do just that.

There is a button labelled 'Print' on the main screen but that simply gives you a message leading you to this printing process – as its not an entirely obvious process in the first place.

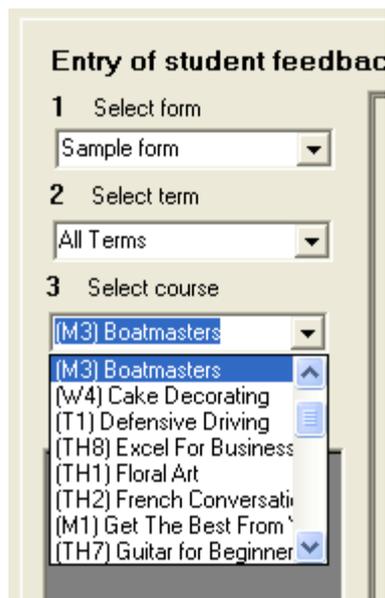
You can remove a question by selecting it then right-clicking on it in the list of objects, as shown.



Now we'll move to the process of entering replies.

### 3. Record replies from students

To enter students' replies click on the second button on the main screen. The following screen will appear. (This is, indeed, the ComEd version screen).



**Entry of student feedback**

1 Select form  
Sample form

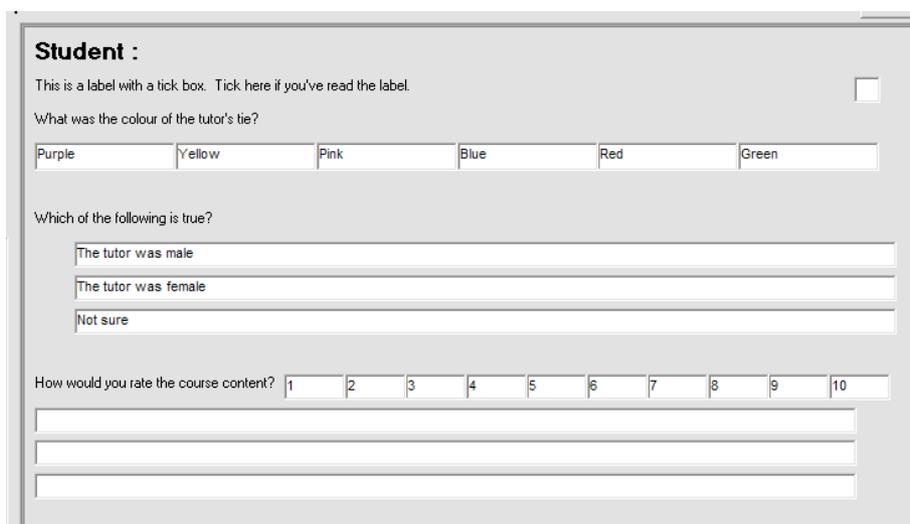
2 Select term  
All Terms

3 Select course  
(M3) Boatmasters

- (M3) Boatmasters
- (W4) Cake Decorating
- (T1) Defensive Driving
- (TH8) Excel For Business
- (TH1) Floral Art
- (TH2) French Conversati
- (M1) Get The Best From
- (TH7) Guitar for Beginner

For the purposes of this demonstration we'll be connected to MUSAC's Classroom Manager software.

Firstly, select the form for which you wish to enter replies. Your choice will be displayed without excluded labels and other superfluous objects (such as spaces) on the right hand side of the screen.



**Student :**

This is a label with a tick box. Tick here if you've read the label.

What was the colour of the tutor's tie?

Purple Yellow Pink Blue Red Green

Which of the following is true?

The tutor was male

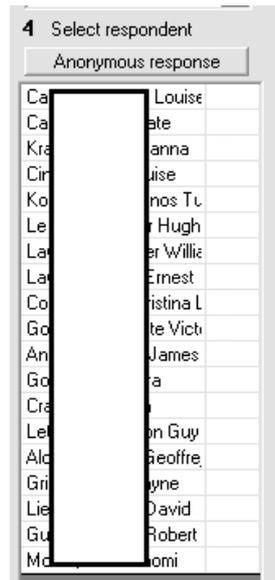
The tutor was female

Not sure

How would you rate the course content? 1 2 3 4 5 6 7 8 9 10

Next, select the term, followed by the course.

Select your choice from the third pull-down menu and the students taking the chosen course will be displayed : (Names have been partially hidden for this illustration)

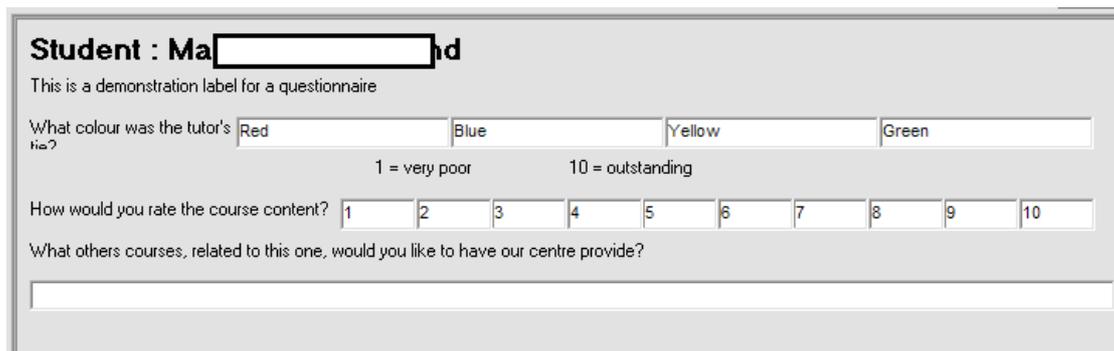


4 Select respondent

Anonymous response

|     |           |
|-----|-----------|
| Ca  | Louise    |
| Ca  | ate       |
| Kra | anna      |
| Cir | oise      |
| Ko  | nos Tu    |
| Le  | r Hugh    |
| La  | er Willie |
| La  | Ernest    |
| Co  | istina L  |
| Go  | te Vict   |
| An  | James     |
| Go  | ra        |
| Cra |           |
| Le  | on Guy    |
| Alc | Geoffre   |
| Gri | yme       |
| Lie | David     |
| Gu  | Robert    |
| Mc  | omi       |

Select a student and simply click on their choices on the right hand side of the screen.



**Student : Ma [redacted]hd**

This is a demonstration label for a questionnaire

What colour was the tutor's tie?

1 = very poor      10 = outstanding

How would you rate the course content?

What others courses, related to this one, would you like to have our centre provide?

All you have to do to record multichoice and multipoint selections is to click in the area selected by the student, and their choice will be highlighted as shown below.

This is a demonstration label for a questionnaire

What colour was the tutor's hair?

1 = very poor                      10 = outstanding

How would you rate the course content?

What other courses, related to this one, would you like to have our centre provide?

If the area is a comment then, for the purposes of analysis later on you have to select from a list of comments. You can add as many different possibilities to this list as you wish but, once you have added a few in each area, you will simply have to select one or more from each list for each student.

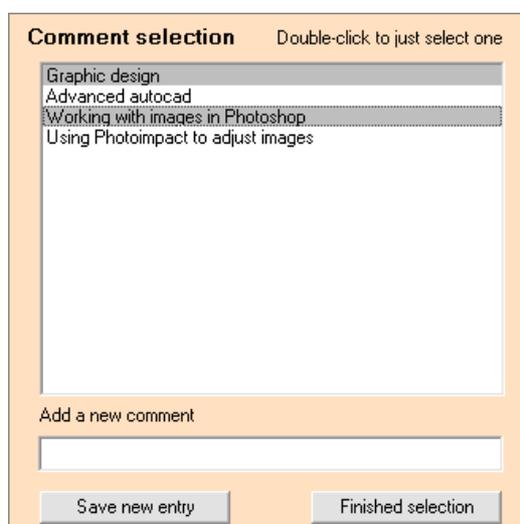
Let's assume that our first student wants a course on Graphic Design. Initially, this will not be on the list for this comment area so we will have to add it. In the illustration below the new entry has been typed in to the 'Add a new comment' area at the bottom of the screen.

**Comment selection**      Double-click to just select one

Add a new comment

Either press the Enter key or click on the "Save new entry" button and it will be added to the list. After you have processed a few students you may have several items added to your list, as shown below.



**Comment selection** Double-click to just select one

- Graphic design
- Advanced autocad
- Working with images in Photoshop
- Using Photoimpact to adjust images

Add a new comment

Save new entry Finished selection

All you have to do now for each student is to select one or more entries from this list and they will be displayed on the student's form (once you have click 'Finished selection') – adding more entries as you come across further different comments.

If a student has only one entry from your list then you can quickly select it by double-clicking on it.

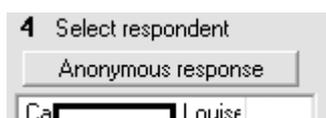
By restricting your choices to what you have added to the list it is possible to move to the third step – that of analysing the results.

If necessary (your form may be several pages long!) there is a scroll bar on the right hand side of the screen which, along with the page up and page down keys, makes it very easy to move about the questionnaire.

Finally, let's cover the other possibility that we've skipped over along the way.

Anonymous responses

It is quite common for schools to allow their respondents to remain anonymous. If this is the case then, for each such response, instead of selecting a student from the list, click on the button above the list labelled 'Anonymous response'.



4 Select respondent

Anonymous response

Ca Louise

This will cause a new 'student' to appear on the list – as shown – and their replies will be recorded under this name. (Each anonymous response is given an automatically incrementing number.)



The re-display of previously entered responses.

If you revisit a group for whom you've previously entered responses then the students concerned will have ticks against their names, as shown.



#### 4 The analysis of the results.

The illustrations in this section are from a different questionnaire to those displayed above.

The first step in the analysis is to select the courses which you wish to include. As you can see from the illustration below I have only entered the partial results from two questionnaires into the package – resulting in an indication that 35% of the replies for the first course have been processed along with all of the second course.

**Analysis of student feedback**

Select term:

Select courses:

| Code | Course                            | Students | Replies | Percent |
|------|-----------------------------------|----------|---------|---------|
| 570A | Accounting with MYOB              | 17       | 6       | 35      |
| 230A | AutoCAD 2004                      | 12       | 12      | 100     |
| 016A | Baking - Cafe/Deli Style          | 10       | 0       | 0       |
| 527A | Basic Car Maintenance             | 2        | 0       | 0       |
| 066A | Blogging - What Is It and How To  | 0        | 0       | 0       |
| 530A | Brain Gym                         | 14       | 0       | 0       |
| 125A | Brilliant Basics                  | 0        | 0       | 0       |
| 065A | Buying and Selling A House        | 21       | 0       | 0       |
| 178A | Chinese Culture and Mandarin - Ex | 10       | 0       | 0       |
| 113A | Chinese Mandarin I - Beginners    | 20       | 0       | 0       |
| 509A | Chinese Yum Char                  | 4        | 0       | 0       |
| 226A | Colour Your Home                  | 1        | 0       | 0       |
| 270A | Computers for Beginners           | 13       | 0       | 0       |
| 001A | Cooking - For New Settlers        | 0        | 0       | 0       |
| 103A | Design a Garden                   | 16       | 0       | 0       |
| 197A | Digital Photography - Advanced    | 13       | 0       | 0       |
| 049A | Digital Photography - Beginners   | 10       | 0       | 0       |
| 120A | Digital Photography - Beginners   | 12       | 0       | 0       |

Buttons on the right:

- Generate individual course summaries
- Generate overall summary list
- % base for table
  - To calculate percentages use the total :
    - replies for each course
    - replies for each question
- Generate overall summary table

Once you have entered an acceptable percentage of the replies you can proceed to the analysis which, as shown on the screen above, can take one of three forms.

#### 1. Individual course summaries

Naturally, I've selected our Autocad 2004 course for the example. As you can see below, the number and percentage of students whose answers fall into each category are shown on the summary.

Test this school

Course evaluation summary

Course evaluation summary for 230A - AutoCAD 2004

Tutor : Lc [redacted] er

|                    |     |
|--------------------|-----|
| Number of students | 12  |
| Number of replies  | 12  |
| Percentage replied | 100 |

What colour was the tutor's tie?

|        |   |     |
|--------|---|-----|
| Red    | 4 | 33% |
| Blue   | 7 | 58% |
| Yellow | 1 | 8%  |
| Green  | 0 | 0%  |

How would you rate the course content?

|    |   |     |
|----|---|-----|
| 1  | 0 | 0%  |
| 2  | 0 | 0%  |
| 3  | 0 | 0%  |
| 4  | 3 | 25% |
| 5  | 3 | 25% |
| 6  | 3 | 25% |
| 7  | 2 | 17% |
| 8  | 1 | 8%  |
| 9  | 0 | 0%  |
| 10 | 0 | 0%  |

What others courses, related to this one, would you like to have our centre provide?

|                                    |   |     |
|------------------------------------|---|-----|
| Advanced autocad                   | 2 | 17% |
| Graphic design                     | 5 | 42% |
| Working with images in Photoshop   | 1 | 8%  |
| Using Photoimpact to adjust images | 3 | 25% |

The other two analyses relate to ALL selected courses so, while only a few results have been entered for this demonstration, they will be a little thin on the ground.

## 2. Generate overall summary list.

The second analysis simply combines all of the results for the selected courses on to the one summary, a rather dubious example (based on one and a bit courses) of which is shown below.

Test this school

Course evaluation summary

Overall summary of all selected classes

|                    |     |
|--------------------|-----|
| Number of students | 29  |
| Number of replies  | 18  |
| Percentage replied | 62% |

What colour was the tutor's tie?

|        |    |     |
|--------|----|-----|
| Red    | 5  | 28% |
| Blue   | 10 | 56% |
| Yellow | 1  | 6%  |
| Green  | 2  | 11% |

How would you rate the course content?

|    |   |     |
|----|---|-----|
| 1  |   | 0%  |
| 2  |   | 0%  |
| 3  | 1 | 6%  |
| 4  | 3 | 17% |
| 5  | 4 | 22% |
| 6  | 3 | 17% |
| 7  | 3 | 17% |
| 8  | 3 | 17% |
| 9  | 3 | 17% |
| 10 |   | 0%  |

What others courses, related to this one, would you like to have our centre provide?

|                                    |   |     |
|------------------------------------|---|-----|
| Advanced autocad                   | 2 | 11% |
| Graphic design                     | 2 | 11% |
| Working with images in Photoshop   | 2 | 11% |
| Using Photoimpact to adjust images | 2 | 11% |

### 3. Generate an overall summary table.

The overall table has two possibilities. From the small example below, where only two courses have been selected, you can see that each cell displays both the number of replies and the percentage. The percentage can be calculated in two ways based on the number either as a percentage of the total replies for the column (for each question) or as a percentage of the total replies for the course (for each row). You have the choice on the requesting screen.

Either way the resulting table will look like that shown below. There are five fixed columns so that, as you scroll across to see further results, you can always see the Course title, the Tutor, the number of students, the total number of replies for the course and the number as a percentage of these replies.

You can adjust the column widths by sliding the column separators (the gaps between the columns) in the top row. Your settings will be remembered for the next time you generate this analysis.

| Course Title         | Tutor              | Students | Replies | Percentage | What colour was the tutor's |        |        |       | How would you rate |
|----------------------|--------------------|----------|---------|------------|-----------------------------|--------|--------|-------|--------------------|
|                      |                    |          |         |            | Red                         | Blue   | Yellow | Green |                    |
| Accounting with MYOB | Patel, Jatin       | 17       | 6       | 35%        | 1 17%                       | 3 50%  |        | 2 33% |                    |
| AutoCAD 2004         | Lovegrove, Christo | 12       | 12      | 100%       | 4 33%                       | 7 58%  | 1 8%   |       |                    |
| Totals               |                    | 29       | 18      | 62%        | 5 28%                       | 10 56% | 1 6%   | 2 11% |                    |

### One other minor detail

At the start of each year a new database will automatically be created by making a copy of the previous year's database. The student responses from that year will be deleted from the copy but, apart from that, everything else will remain – your questionnaire designs and settings will still be there.

# *Chapter 8*

## **Using the web site**

|  |      |
|--|------|
| What's in this chapter?                  | Page |
| 8.1 Using the Worsfold Software web site | 8.1  |

### **8.1 Using the Worsfold Software web site**

Early in 2005 a web site was established to enable users of the Com.Ed. software to stay up to date with both the latest enhancements and the latest version.

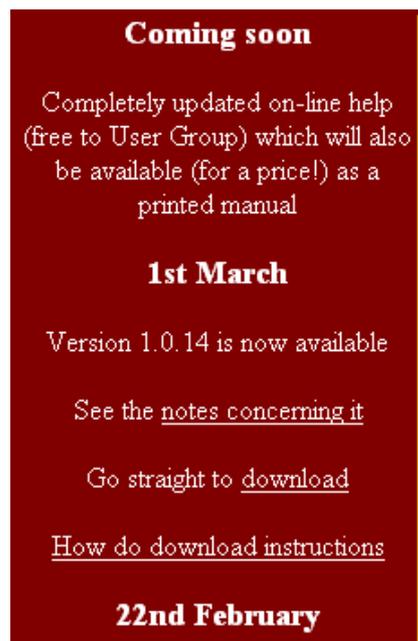
If, for some reason, you discover a fault in the software then please check the web site first. It may very well be that others have discovered it before you and it has already been rectified and made available.

The name of the web site is : [www.worsfoldsoftware.co.nz](http://www.worsfoldsoftware.co.nz)

The 'Home' page is shown below.



Users of Com.Ed. should keep an eye on the left hand panel, where latest information is added to the top every time a change is made. Links here (white underlined text) take you to three places of immediate interest.



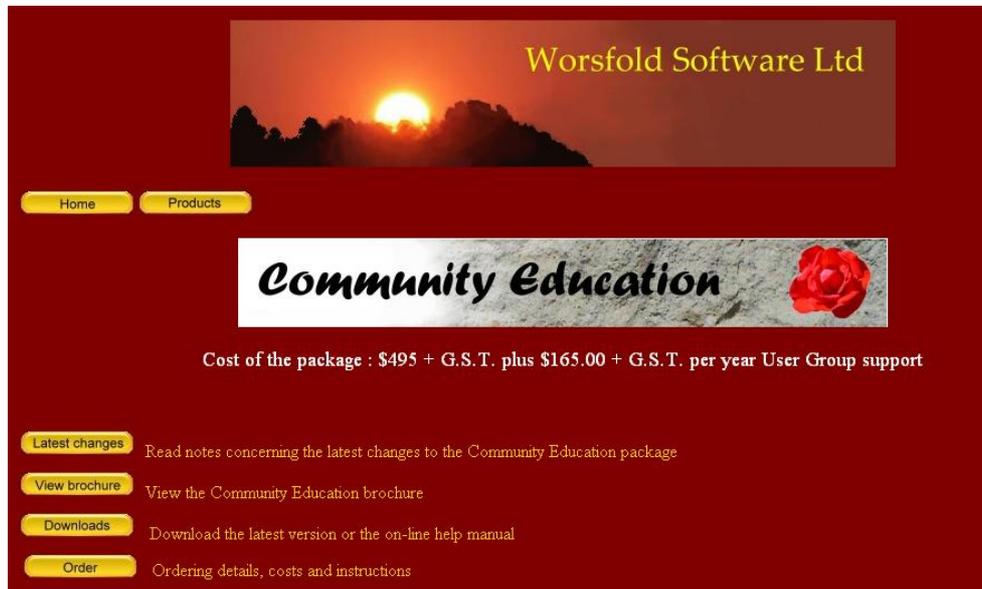
At the top of the screen are some buttons....



.. and, while you are welcome to browse them all, the one of most interest to Com.Ed. users is the first : Products, which leads to the Products page, shown below.



The second button on this screen takes you to the Community Education page, shown below.



While this screen tells you about the package, there are two links of particular interest. These are the first and third down the left hand side.

### **Latest changes**

Whenever a change is made to the package the details of the changes made will be reported on the Community Education notes pages, accessed via this link.

This page is shown below.

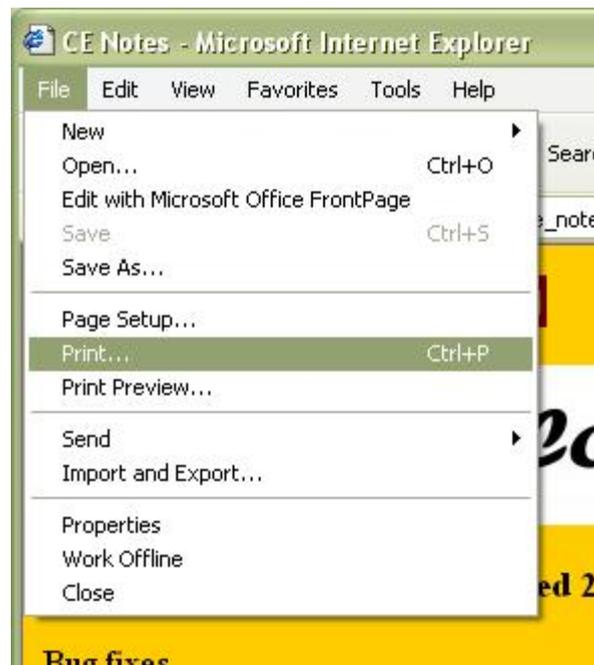


The screenshot shows a yellow website header with navigation buttons for 'Home' and 'Community Ed.'. Below the header is a banner for 'Community Education' featuring a red rose. The main content area lists three versions:

- Version 1.0.14** Released 2 Mar [Download](#) the new version here
- Version 1.0.13** Released 28 Feb
- Version 1.0.12** Released 27 Feb

Each version entry is followed by a 'Bug fixes' section. For version 1.0.14, the fixes include: 'Robyn at Selwyn College reports that a saving a new course crashes unless there is an entry in the new 'Course change alert' field. It's fixed now.' and 'A second error occurred at Onslow in trying to print a course with no students. This too won't happen now.'

This pages lists all the changes (both bug fixes and enhancement, with the latest changes reported at the top of the page. If you so wish, you can print this page via the menu at the top of your browser, e.g.



The other link of particular interest in that which accesses the download screen. This

is available via both the link on the ComEd screen and the link on the notes screen.



The download screen appears as shown below.



The download required is the second one – the latest version of the program file.

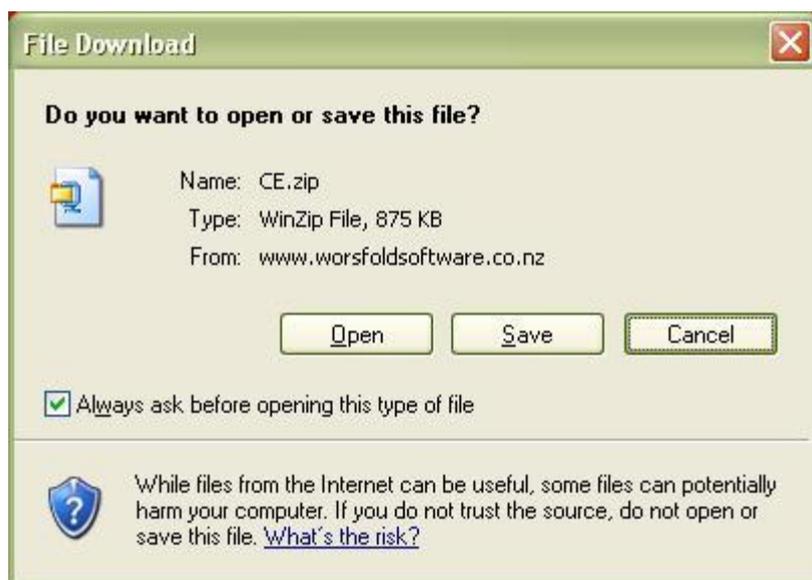
The link in blue towards the top of this area provides full instructions on how to process the download. These instructions are reproduced here:



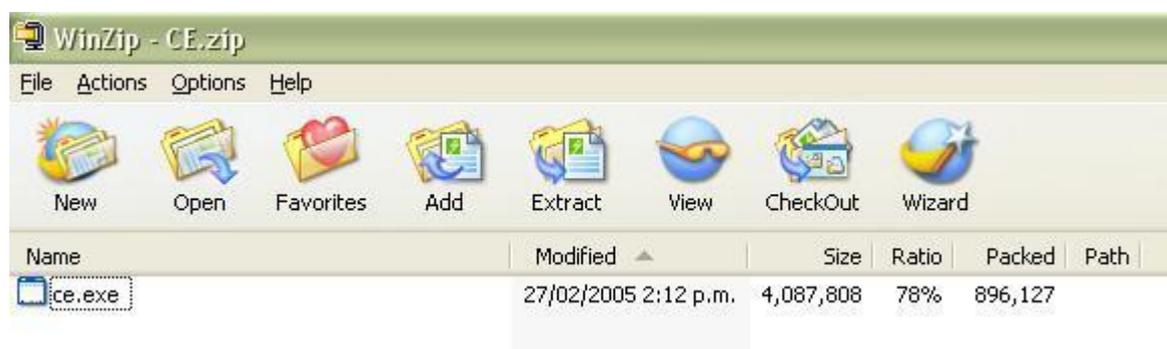
How to install from the download (in three easy steps!)

1. Exit from the package if it is currently running.

2. Click on the 'Download' button. A dialogue will ask you if you wish to 'Open' or 'Save' the file. I've always preferred to 'Save' as, if the installation needs to be repeated, or I wish to install in more than one place, then 'Save'ing the download file makes this easy. I always save it to my desktop, then, when I have completely finished with the download, I can delete it. An example of this dialogue is shown below.



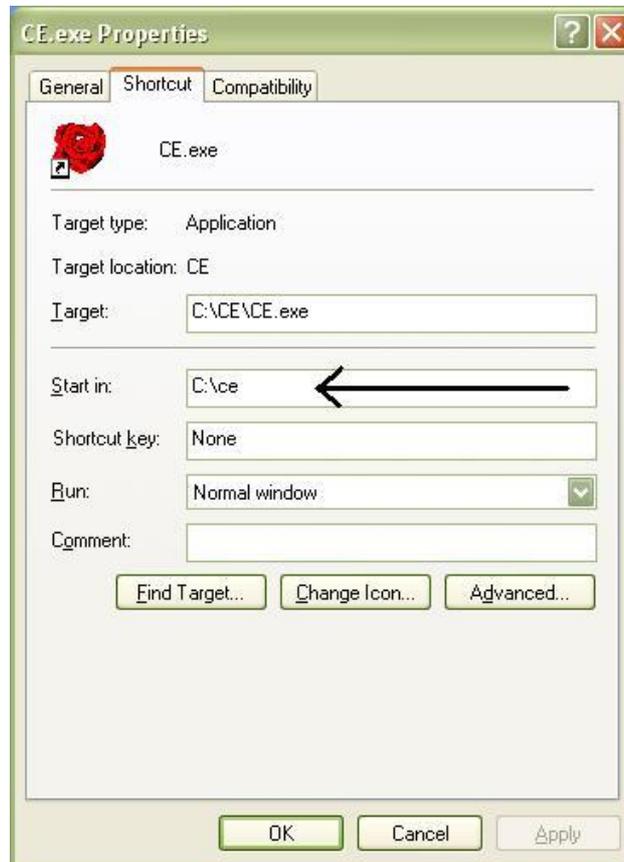
3. Once you have completed the download to your desktop exit from the web site (having read and maybe even have printed the notes concerning the latest enhancements) and double-click on the download on your desktop. The download is called CE.zip. When you double-click on it, it will open into 'winzip', as shown below.



Click on the 'Extract' button and navigate to your \CE directory. An example of this is shown below.



If you do not know where your \ce directory is then you can find out by right-clicking on your desktop short-cut and selecting 'Properties'. The location will be displayed as the target. An example of this is shown below.



Copy and paste, or simply type, the target (e.g. c:\ce) into the 'Extract to' field on the extract dialogue (see two illustrations back...) and then click the 'Extract' button in the top right hand corner of the window. If you are asked whether or not you wish to overwrite the existing file, then the answer is 'Yes'. That is exactly what you are trying to do - to replace the old version with the new one.

N.B. Installing a new version of the program will NOT touch your data. Your data lives in a database named e.g. ce2005.mdb and this is not affected by installing a new version of the program.

If you wish to print out these instructions then go to the top left hand corner of the screen now, and select File / Print



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