

Gateway Course Management

***Worsfold Software Ltd
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Contents

Chapter	Page
0. Licensing and Warranty information	v
Conventions	vii
1. Overview and Installation	1.1
1.1 Overview	1.1
1.2 Installation	1.2
2. Setting up	2.1
2.1 Overview	2.1
2.2 Edit Users	2.2
2.3 Configuration (Defaults and Income budgets)	2.3
3. Students	3.1
3.1 Overview	3.1
3.2 Adding a new student	3.2
3.3 Placements	3.5
3.4 Courses	3.13
3.5 Achievement Summary	3.18
3.6 Costs Summary	3.18
3.7 Notes	3.19
3.8 Medical Details	3.19

4. Printing	4.1
4.1 Individual Student Forms	4.2
4.2 Pre-designed Lists	4.4
4.3 MOE Returns	4.5
4.4 Document Design and Printing	4.5
5. Utilities	5.1
5.1 The End-of-Year process	5.1
5.2 Making or restoring a backup	5.4
5.3 Emailing your database	5.6
5.4 Data Export	5.9
5.5 Import NZQA Unit Standards	5.12
6. Using the web site	6.1
6.1 Using the Worsfold Software web site	6.1

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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.

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 specification of courses 3.12' means that this topic is to be found on page 12 of chapter 3.



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	1.2

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. gw2007.mdb

Its purpose is to make it possible for schools to manage their Gateway Programme.

The basic processes include :

1. Adding a new student
2. Defining the student's programme
 - Placement(s)
 - Course(s)
3. The entry of student results
4. A printing utility which allows you to :
 - a. Print various lists.
 - b. The generation of Ministry of Education returns.

- c. The printing of various summaries
 - d. The definition and use of user-defined documents
5. Several utilities which allow you to :
- a. Run an end-of-year process
 - b. Export data
 - c. Make or restore backups of the data
 - d. Email your database
 - e. Import the latest standards from NZQA

1.2 Installation

Gateway Course Manager is supplied on a CD and a registration file will be emailed at the time of sending the CD.

The CD contains the installation process which involves three sets of files.

1. The full install including system Files

This process will install the package (which consists of a program and several support files) and will also install the system files. These are files which your computer requires to enable it to run the Gateway software. They include such things as the printer functions, the Access database functions and the like. These must be installed on EVERY computer which runs the Gateway package, even if it is accessed across a network. The system files are a small subset of the system files installed to run MUSAC software.

If you do require to install the system files then you should ensure that no other programs are running when you do the installation.

If your school has installed the MUSAC system files or Worsfold Software's Star package on a particular computer then there is no need to run the full install. The second installation process (below) is sufficient.

Over two hundred schools are currently running the STAR package and a small number of these experienced difficulties installing the system files. The Gateway installation uses the same process so the same difficulties could be experienced. In

all cases (but one) it has been possible to proceed by separately installing three particular system files.

The three files concerned are also on the CD, in a separate directory named (strangely enough) '\system files'. This directory also contains a small 'read me' text file which contains the following instructions for the manual installation of the system files.

"Please find here three files which have occasionally caused installation problems when installing the Gateway software package. They are part of the system files which need to be installed on each terminal accessing the program. If you do not have sufficient rights (Administrator rights) during the installation of the system files then these three may well not be installed correctly.

The three files are :

CPWCTL32.OCX

COMPPL32.DLL

COMPPL32.LIB

All three should be copied in to your \windows\system32 directory.

Once there the two renamed files should be registered on your computer. To do this, click on the Start button and select 'Run' then type e.g.

```
regsvr32 cpwctl32.ocx
```

and press OK This will register the first of the two.

Repeat the process for the other : regsvr32 comppl32.dll"

We have come across one machine which has caused a lot of trouble during attempts to get the package up and running. It is a 64-bit Windows Vista laptop which seems to have a degree of protection designed to thwart even the most simple installation process. We have managed to get the program up and running, but only after rewriting a section of it which used a 32-bit section of code, which the Vista environment was completely unable to handle.

In the meantime we are NOT recommending the use of VISTA as an operating system. Worsfold Software Ltd has purchased a VISTA laptop in order to test the environment. Details of our success or failure will be distributed to users by email.

Networking

Should you wish to install the package on a network (for which it is ideally suited) then simply install the package (without system files – see section 2 below) on the file server, and create a shortcut to the program on each of the terminals wishing to access the package. Each terminal WILL require the system files, so you will need to use this installation process on each terminal – and then remove the \gw directory and all of its contents on each terminal. (At present this is the simplest way of getting the necessary system files installed).

2. The installation of just the Gateway program

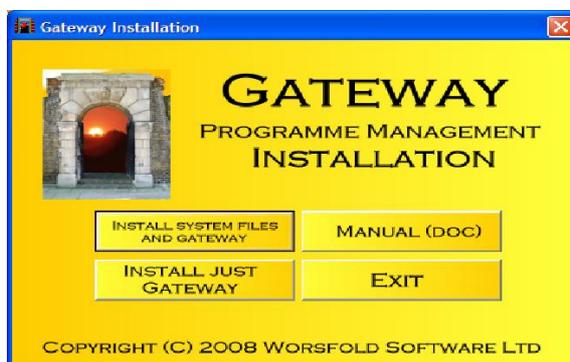
This process installs just the program itself and a few support files. No system files are involved. These need to be installed only once – on your computer or, in the case of network use, on the fileserver.

3. The manual

The manual is supplied as a word document on the CD. It is also supplied as an on-line help file and this is included in both of the installation processes above as well as being found separately in the \manual directory on the CD.

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 GWINSTALL.EXE. Run this program by double clicking on it. The installation menu should appear.

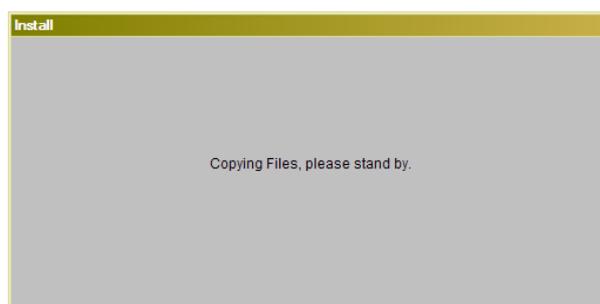


On this screen you will see the three buttons corresponding to the three processes described above.

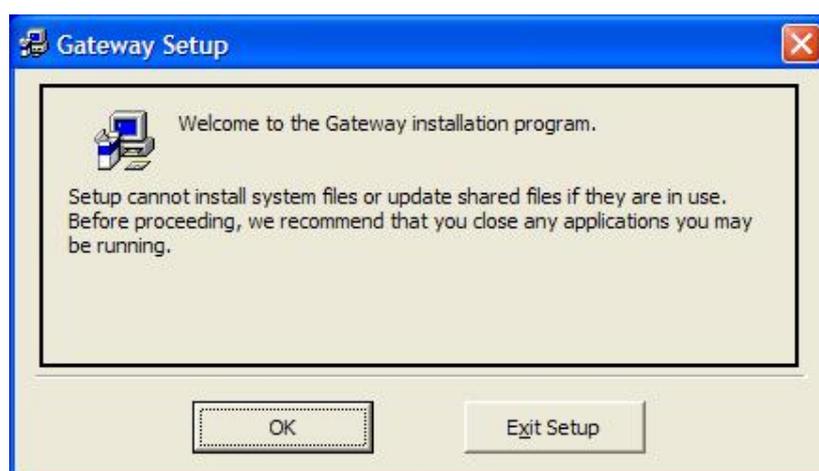
Click on the button on the left which you require for your installation.

Install system files and Gateway

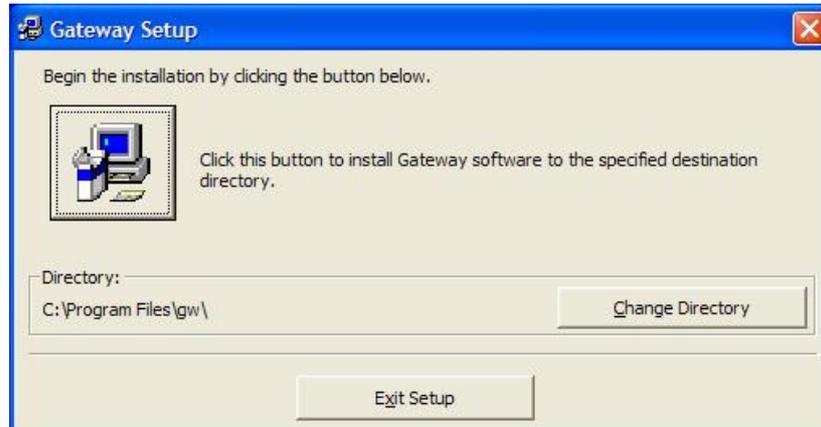
The first screen shown will appear, ...



...followed shortly by the welcome screen, also shown below. As suggested above, you should have closed down other programs prior to beginning this installation. The welcome screen reminds you of this.

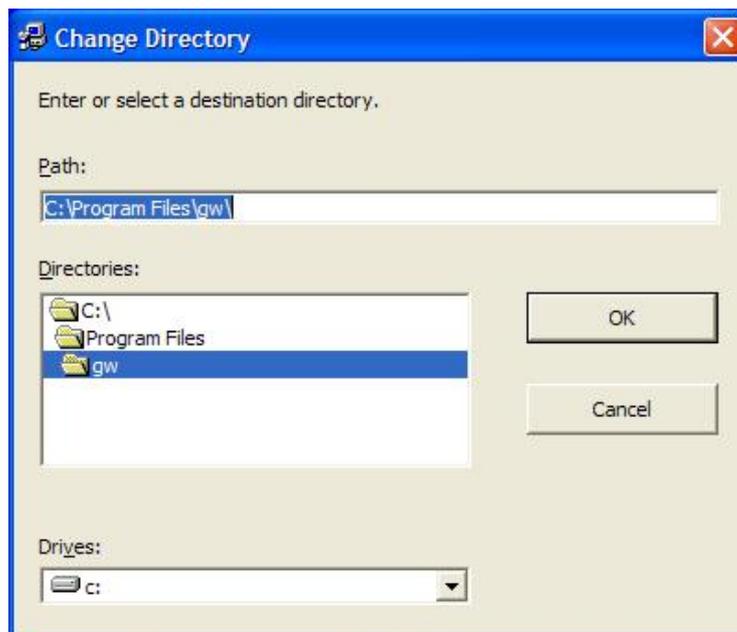


Once you click "OK" to proceed, the first step is to identify the directory into which you wish to install the Gateway package. The suggested directory is, strangely enough, "\gw". The installation screen below is offering a sensible alternative, that is, to install into a gw directory under the \Program files directory.



If you are happy with this then proceed to click on the large button with a picture on it – to begin the installation itself.

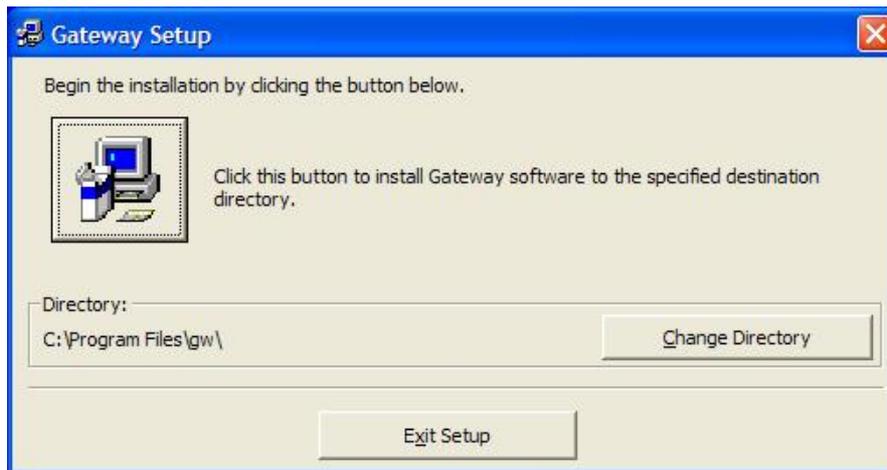
If you wish to select a different directory then click on the 'Change directory' button. This will lead you to the following screen.



Navigate to the directory into which you wish to have the \gw directory created.

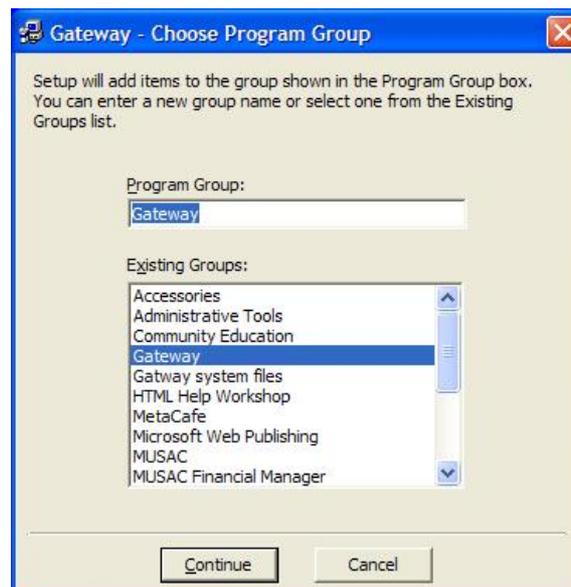
If you have previously installed Gateway then you should select the existing \gw directory as your installation choice. Do NOT install in another gw directory as multiple installations can lead to multiple frustrations!

Once you have made your choice of directory, click on the 'OK' button and you will arrive, once again, at the following screen.

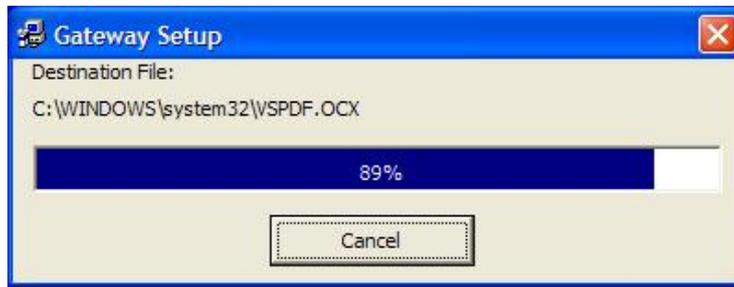


This time you will be ready to click on the large button with an icon, to commence the actual installation.

Prior to this occurring, you will be asked to nominate a group, as shown below. The choice of 'Gateway' seems appropriate.



Continuing, the installation progress will be displayed.



During the installation of the system files, a check is made to ensure that the version being installed is NOT earlier than an existing version previously installed by the installation of another package on your computer. Should this occur then a screen such as that shown below will be displayed.



The correct replay to this screen is to click on the 'Yes' button – to KEEP the existing later version.



Once the process has been completed, you will receive the following message.

Please note the description of and solution to the difficulty experienced during installation in a small number of schools, described earlier in this chapter, page 1-3.

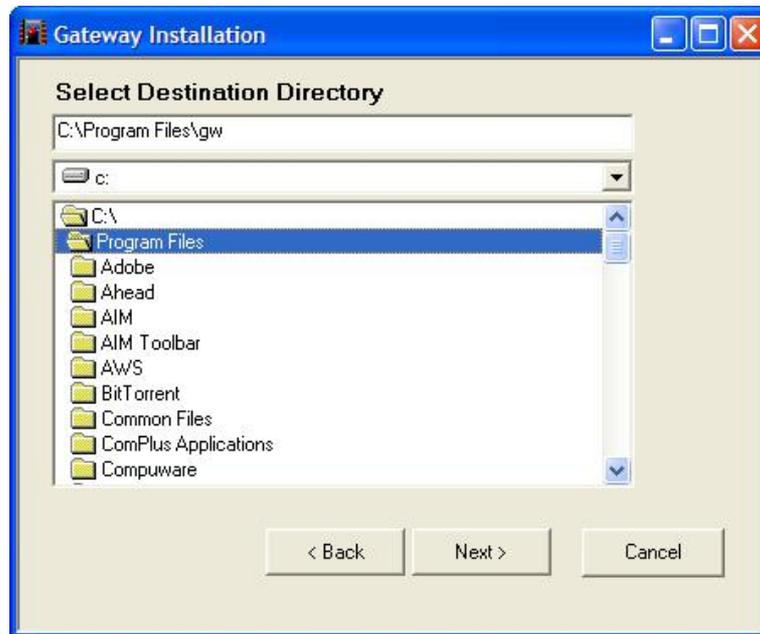
Install just Gateway

If you have already installed the MUSAC system files on to your computer (remember that they must be installed on to every terminal which accesses Gateway) then this is the process for you.

This first screen offers the default installation directory – the \gw directory off the root directory of your current machine, as shown below.



Should you wish to install into a different location then click on the 'Browse' button. This will lead you to the following screen, via which you can navigate to your desired destination.

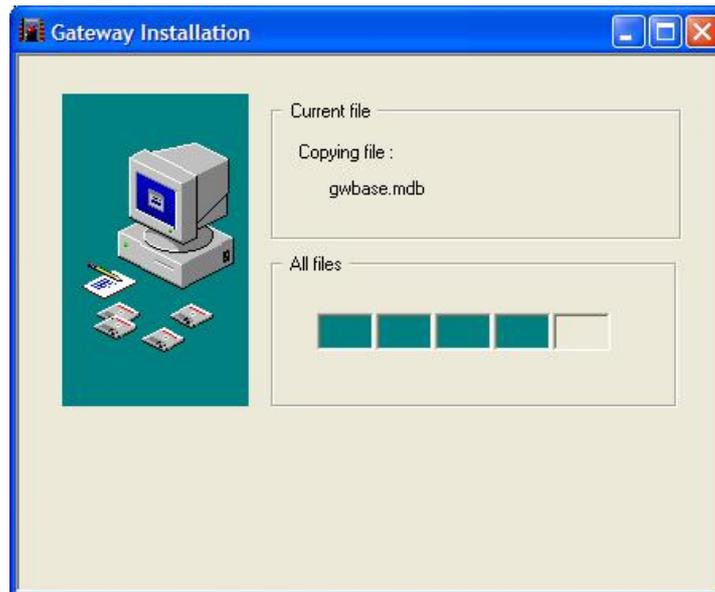


Once again, do NOT navigate to an existing \gw directory. Instead, navigate to the directory one level higher. If you keep an eye on the display at the top of the screen (above) you will see that the \gw directory has been added to your choice automatically.

Once you are satisfied, click 'Next' and you will arrive at the final confirmation screen, shown below.



Click the 'Next' button to commence the installation – which simply involves the copying of a few files from the CD to the \gw directory (which will be automatically created if necessary) off the nominated directory. The progress screen below will let you know what is being copied.



Once the process is complete, the following screen will be displayed, and your task here is done!



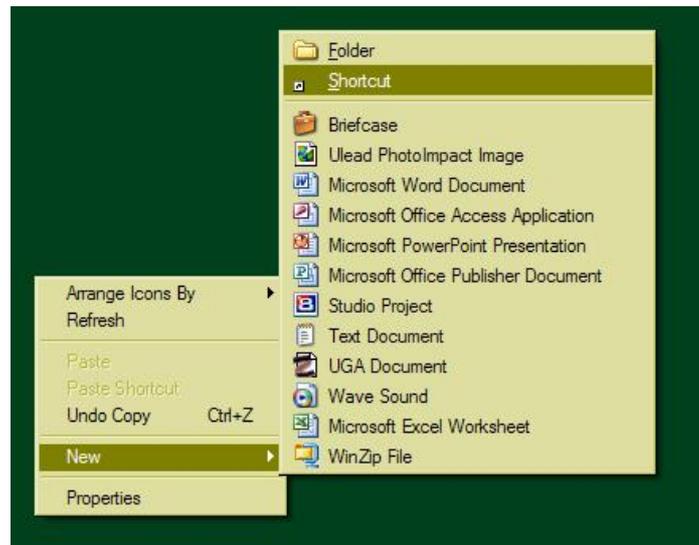
The manual

The Gateway Course Management manual is included on the CD in the form of a Microsoft Word document. Clicking on the third button will cause the manual to be loaded into Microsoft Word.

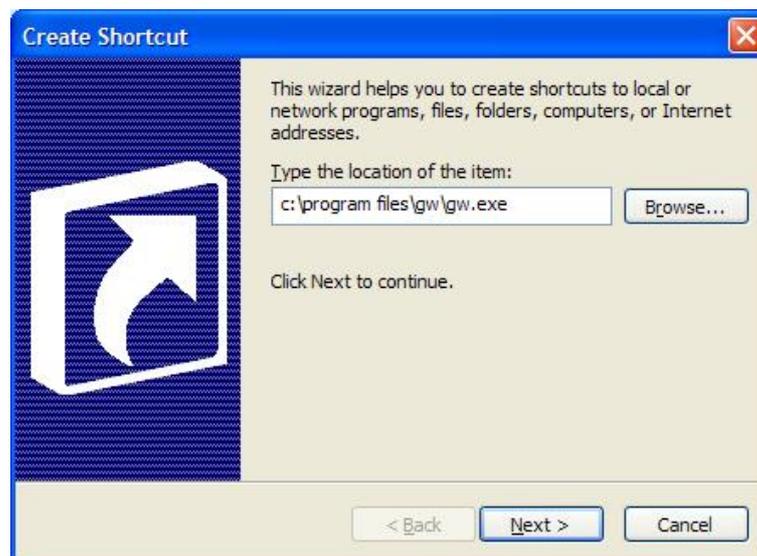
Running the program

Gateway consists of one application file called gw.exe and this is found in your \gw directory.

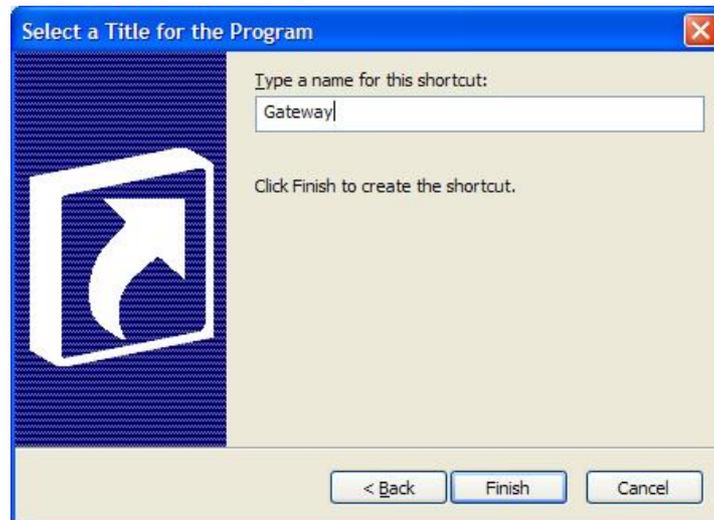
You will probably wish to create a shortcut to this program and to have this shortcut on your desktop. To do this, right click with your mouse on the desk top....



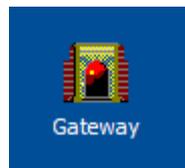
Select 'New' followed by 'Shortcut', as shown above. The following dialogue (or one like it, depending on the version of Windows which you are running) will appear. Either 'Browse' to identify the location of gw.exe or type it in if you know it. Then click 'Next'



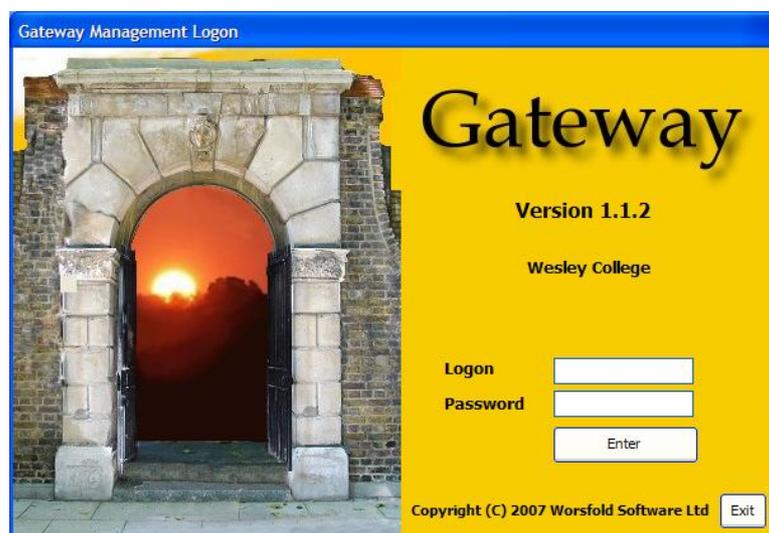
The second step will appear....



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

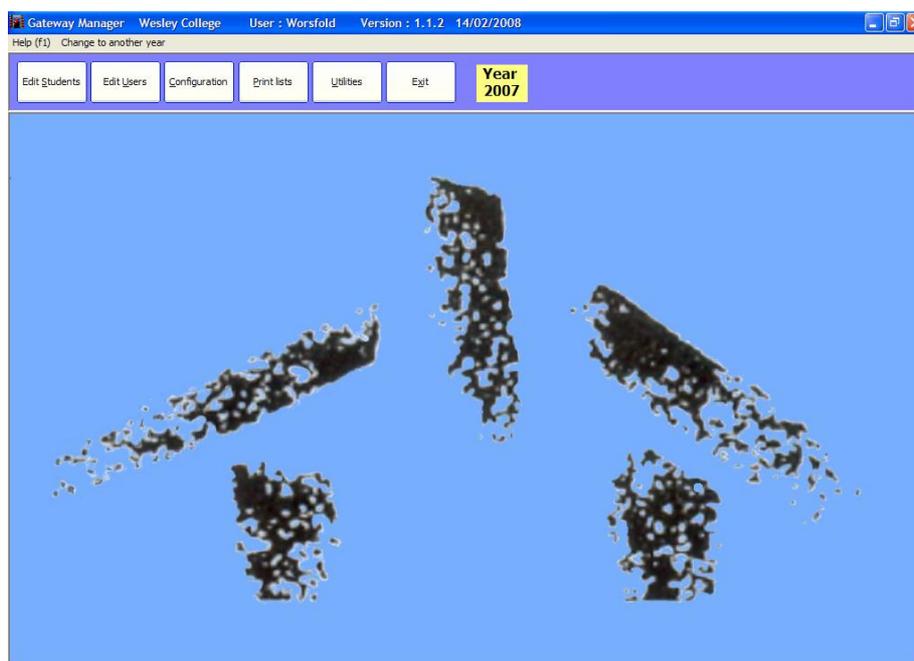


Now, to access the program you simply have to double click on the shortcut. Doing so will lead you to the opening ('Splash') screen for the package.



Initially, you should enter using the entry code : **guest** and password : **worsfold**
Later on, you will set your 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.



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

- 1. Click on the HELP menu to access the help screens.**
- 2. Use the 'Edit Users' button to enter yourself, and any others as users - allocating the correct package rights to each.**
- 4. Add a new student**
- 5. Attach placements to each student**
- 6. Attach courses to each student**
- 6. Print lists and various other analyses.**

Licensing

The program is licensed to a school on an annual basis. The initial license is recognised by a small file named 'gwreg.lic'. This is a registration file which contains your school name. It is emailed to you at the time when your order for the package

is mailed to you.

If you have NOT copied your license file into your \gw directory then the program will run perfectly but you will be unable to send printouts to your printer. Any data you enter will be held perfectly safely in the database and will NOT be lost when you DO put your license file into place.

The email which is sent out with the license file is reproduced below.

"Gateway Order confirmation and registration

Greetings from Worsfold Software Ltd

You have recently ordered the Gateway Course Management package and this has been put in the post to you.

Please find attached a small registration file. This file is not intended to be opened. It is simply an encrypted registration file.

Once you have installed the package, copy this file to your new \gw directory. This will indicate to the program that the package has been registered for your school for 2008.

If there is no file attached then please contact me, either by email at the above address, or by phone on 03 449 2094.

If you have any questions or comments or suggestions concerning the package please do not hesitate to contact me."

Please note that, as described in the email, the small file attachment is NOT intended to be 'opened', but simply copied or 'saved as' into your \gw directory. If, in spite of these instructions, you did attempt to open the file, and immediately emailed me to let me know that it would not open, then you are not alone!

Subsequent licensing

After your first year of use of the package, an invoice will be sent to you for the annual license fee (currently \$80.00 + GST for 2008). On receipt of the payment, a school-specific password will be sent to you, which you can use to license the package for the new year. License invoices are not posted until April and you have at least two further months before you will start being asked for a password.

This concludes the installation process. If you have any questions please either :

call Worsfold Software PH 03 449 2094

or e-mail to randcbutler@paradise.net.nz

Chapter 2

Setting up

What's in this chapter?	Page
2.1 Overview	2.1
2.2 Edit Users	2.2
2.3 Configuration	2.3

2.1 Overview

There are two processes involved in the initial setting up of the package. These are :

Users

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

Configuration

There is a number of details which need to be specified in order to make the package work in your school. These include :

- An optional link to MUSAC's Classroom Manager
- Your school's MOE number
- Your wishes re display of unit standards

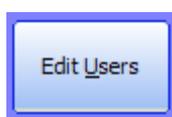
The two areas are accessed via the second and third buttons on the main screen.

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.

This utility allows you to add to or delete users from the database and to adjust their passwords and/or their rights to the various functions of the package.

Currently listed users

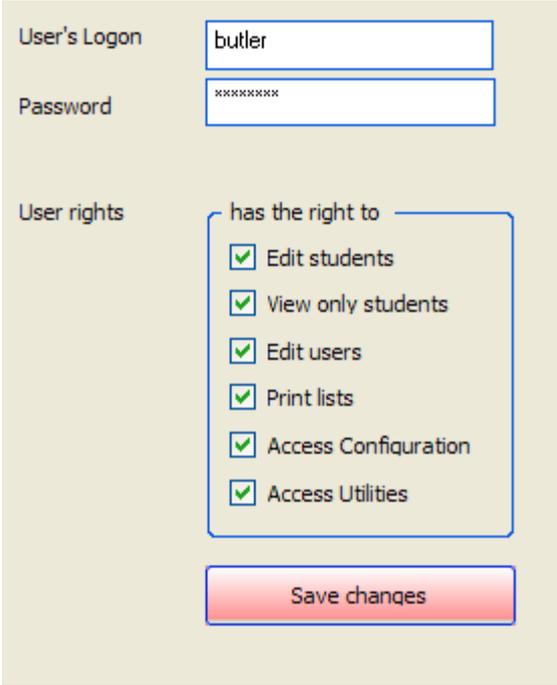
quest	User's Logon	<input type="text"/>
	Password	<input type="text"/>
	User rights	has the right to <input type="checkbox"/> Edit students <input type="checkbox"/> View only students <input type="checkbox"/> Edit users <input type="checkbox"/> Print lists <input type="checkbox"/> Access Configuration <input type="checkbox"/> Access Utilities

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 Gateway.

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 watching cannot follow the movement of your hands.

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



User's Logon: butler

Password: xxxxxxxx

User rights: has the right to

- Edit students
- View only students
- Edit users
- Print lists
- Access Configuration
- Access Utilities

Save changes

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

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 Configuration

The second area to visit in preparing your package for use is the 'Configuration' area. Click on the 'Configuration' button at the top of the main screen and the following screen will appear.

This screen has two tabs – located at the top of the lower half of the screen. The first is labelled 'Basic Configuration' and leads to the screen shown above. This area can be used to specify three details.

1. Configuration

a. Is your school using one of these systems?

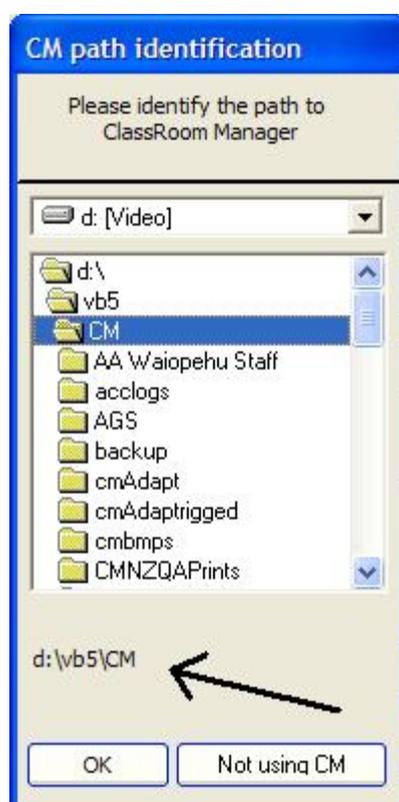
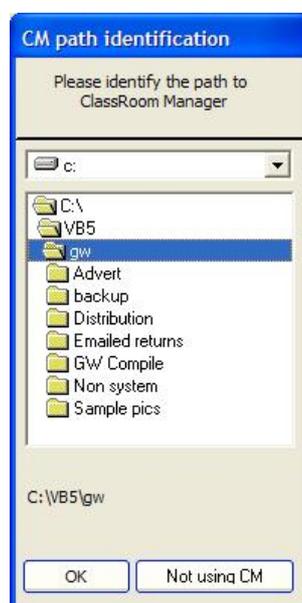
The package is designed to work well regardless of whether or not you are using a Student Management System. Currently there are two systems which support this Gateway package.

i) If your school is using MUSAC's Classroom Manager then you will not have to type in students' names as these will be retrieved from that package.

To link to Classroom Manager you must specify the path (directory structure) where the cm database is to be found.

To do this, click in the white data-entry area under the heading 'Path to Classroom Manager'. The following small window will appear.

If you have arrived here unintentionally then click on the 'Not using CM' button and the link will not be created. Otherwise, use the listing to navigate to where your school's CM database is stored. Note : You should double-click to select a setting. This will cause subdirectories to be displayed. A possible final display might look like the second illustration below:



Once the correct path is shown where the arrow above is pointing, click on the button labelled 'That's it' to have your information stored.

Please note that the package does NOT support UNC path names. (These are network locations which appear as e.g. '\\zeus\Apps\gw' – starting with a double back-slash. Please have you IT expert 'map the drive' so that you may select it e.g. 'm:\apps\star'.

ii) KAMAR also provides the ability to link to STAR. KAMAR provides an export facility which generates a file of student information. The title of this file is 'worsfold.csv' and you should generate it and copy to your \gw directory. If this file is found (and you have indicated on the screen above that you are linking to KAMAR – by clicking in the second option button on the left) then, when you go to attach students to courses those found in the KAMAR export file will be listed for you.

This process does also allow you to connect a course to one or more option classes, but the package is unable to either recognise attached unit standards or to retrieve students' unit standards results.

iii) If your school is using neither MUSAC not Kamar than indicate this by clicking on the third option – 'using neither'.

b. What is your school's MOE number.

Enter the correct number, without any leading zeroes, as shown below.

What is your school's MOE number ?

c. When selecting standards

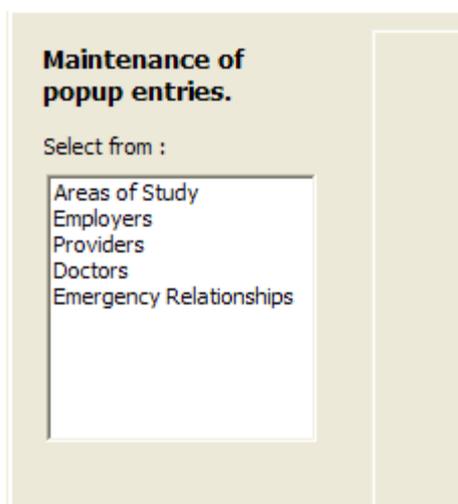
You have the choice of displaying either all unit standards or just the latest version of each. This process will be covered in detail in the following chapter. In the meantime, make your initial choice here. You can always change your mind and revisit this screen later. There are currently some 48500 plus unit standards on file and the fewer you have to hunt through the better. (Mind you, there is, of course, a fast way to enter a standard without having to load them all....)

Make your selection as shown below.

When selecting standards, show All versions Only latest versions

2. Manage Popup Entries

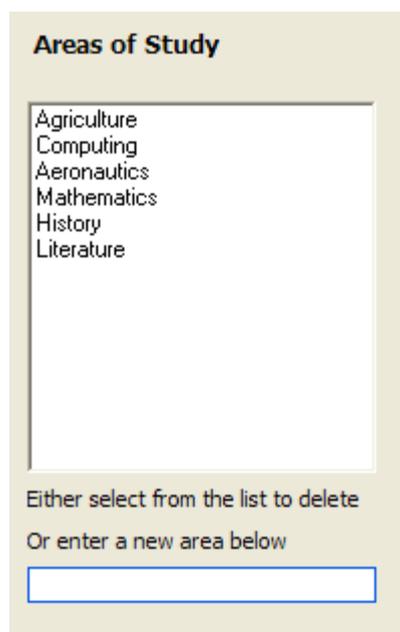
The second tab is labelled 'Manage Popup Entries'. The purpose of this routine is to allow you to easily add to or edit the entries in various popup lists which the package uses. Click on this tab and the following screen will be displayed.



As you can see, there are five popups which you can edit. Most follow the same process as the top one.

Areas of Study

Click on the first and the existing Areas of Study are displayed.



These are areas from the testing phase of the package and may not bear any relation to reality at all! To enter a new Area, type its name into the text area at the bottom of the screen and press <Enter>. To delete an entry from the list just click on it and you will be asked whether or not you wish to delete it.

The last popup, Emergency Relationships, follows the same process as that shown above. Each of the others, however, are different.

Employers

The employer specification screen is as shown below.

Employers
Currently listed employers

Christine's Gardens Inc	Employer	Christine's Gardens Inc	Notes	Specialises in roses
Flying Machines Inc	Contact	Christine Butler		
Grahams' Garage	Address	26 Chandler Crescent		
Jim Home Washery		Clyde		
Serious Chocolate Company		Central Otago 9330		
Worsfold Software Ltd	Phone	03 449 2094		
	Cell phone	n/a		
	Email	randcbutler@paradise.net.nz		

You can 'Add a new employer' and you can 'Delete selected employer'.

You will note that there is no 'Save changes' button, as changes are saved as you enter the information.

Providers

Providers are those who deliver unit standards. These may NOT be the same as employers.

The screen is as shown below.

Providers

Provider	Code	Loc.
James Adams	4323	3
Jim's Garage	4455	6
Plunket NZ	8389	2
PORSE	8224	1
Porse ECE Training	8224	1
Rorys school	5544	3
Tonaga Quarries	5567	3
Travel Careers and Training	8706	2
UNITEC	6004	1
University of Auckland	7001	1

Provider name:
 Provider number (e.g. 225):
 Location code (e.g. 5):

Note that location numbers are required for providers of unit standards

This time there is a 'Save changes' button, as you cannot save details relating to a provider until you have specified both the name and the number. (If you do not know a provider's number then contact them and ask for it.)

Doctors

If you are linked to MUSAC then there will be a button at the bottom of the screen (as shown above) which you can use to import all of the doctors in the Student Manager database. If not, then you can type the relevant information into the table.

Name	Address	Phone	
Accident/Medical	750 Victoria Street Hn	834 0333	
Adrian Pett	31 Vercoe Rd, Hamilton	849 7200	
Amrit Lad		849 4488	
ANDERSON Brett	Dinsdale Medical Centre	847 8425	
Anglesea Clinic		838 3555	
Appanna	Five Cross Roads	855 7824	
Armstrong	St Andrews Medical Centre, Bryant Rd, Te Rapa	849 4181	
Bertram Young	189 Cambridge Road Hamilton	856 5087	
Bhula	Heaphy Tce Hn	855 2079	
BRADLEY	91 Kahikatea Dr, Hamilton	838 2323	
Brian Robb	Hamilton East Med Centr	8391 232	
Brokenshire	Five Cross Roads	855 7824	
Brown R	Grandview Medical Centre	847 2168	
Butler	MUSAC Massey University	06 3505018	
Carmichael	Glenview Med Centre	843 4429	

Import doctors from Student Manager

This time there is no 'Save changes' button as all that is essential for a particular doctor is their name and once that is entered an entry is created in the database for them and subsequent details are automatically attached to that entry.

Chapter 3

Students

What's in this chapter?	Page
3.1 Overview	3.1
3.2 Adding a new student	3.2
3.3 Placements	3.5
3.4 Courses	3.13
3.5 Achievement summary	3.18
3.6 Costs summary	3.18
3.7 Notes	3.19
3.8 Medical details	3.19

3.1 Overview

This section of the package is the core component wherein the students, their placements and their courses are specified. Click on the first button in the top row, 'Edit students' and the following screen will be displayed.

You will notice that the left hand side of the screen is devoted to information relating to the student. The right hand side is devoted to a series of tabs, each of which provides access to a screen relating to placements, courses, summaries and medical details.

Down the very left hand side of the screen is a blue bar which, when you move the cursor over it, causes a student selection screen to slide out and be displayed.

Finally, at the bottom of the left hand side are some important buttons.

The first tab, which is always displayed by default, is labelled 'Overview'. This tab displays two lists relating to the displayed student.

- a) A list of the student's placements
- b) A list of courses taken by the student.

You can see at a glance the displayed student's programme.

3.2 Adding a new student

To add a new student you may or may not have two options. If you are linked to either MUSAC or Kamar then you can either :

- a) Type the details into the text fields on the left hand side of the screen
- b) Use the 'Student Selector' to choose a new student from the SMS database.

If you are NOT using either MUSAC or Kamar then you must use the first method.

The fields concerned are those you would expect. The only point of note is the use of the two little 'three-dot' buttons against the last two fields. Clicking either of these allows you to set which Gender and Ethnicity you wish to occur as the default each time you add a new student.

Let's look now at the 'Student Selector'. Move your mouse over the left hand blue panel and it will slide out, as shown below (Reduced in height to save paper).

Look for :

Family name	First names	Year

Year 9 10 11 12 13 All years

Later, you will use this selector to redisplay an existing student. In the meantime, to add a new student, click on the button at the top which will be labelled either 'From CM' or 'From Kamar'. When you click this button a list of the students in the school will be displayed.

Look for :

Family name	First names	Year
A	Ar	8
A	H. resna	11
A	RRAY Er	11
A	Je yun	12
A	Cl /illiam	9
A	Al J	13
A	Tr hristopher	9
A	Tr hristopher	10
A	P: mes	10
A	Michael	10

Year 9 10 11 12 13 All years

You can narrow your search in two ways.

- You will notice that the cursor is flashing in the 'Look for' box at the top of the screen. Just start typing the family of the student for whom you are searching and the list will move to display the nearest match.
- You can narrow the search to one or more year levels by clicking in the year level tick boxes at the bottom of the screen.

Once you've spotted the required student, click on their name. The 'Student selector' will slide back out of sight and the chosen student's details will be displayed so that you do not have to enter any further information.

As an example, I've entered my own details, as shown below. When complete, click the 'Save changes' button (which will become red whenever you make a change).

Name	Butler
First Names	Rory Hugh
Preferred Name	Rory
Year	11
NSN	1234565439
Address	26 Chandler Crescent
	Clyde
	Central Otago
Post Code	9330
Home Phone	03 449 2094
Cell Phone	
Email	randcbutler@paradise.net.nz
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female ...
Ethnicity	European ...

Once you have saved the changes revisit the 'student selector' and you will see one student listed. Each time you add a new student they will be added to the 'Student selector'.

Look for :

Family name	First names	Year
Butler	Rory Hugh	11

Remember, to select a student from the school's database, click on the 'From CM' (or 'From Kamar') button at the top of the screen. To switch back to view the students currently in the Gateway database, click the other button labelled 'From Gateway'

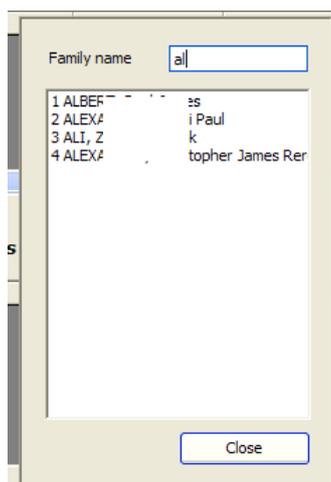
Once you have several students in the database, you have two ways of selecting an existing student.

- a) Use the 'Student selector' and begin typing the required family name. Once you can see the required student, click on their name to select them.

Should you wish to hide the 'Student selector' panel, click on the vertical blue 'Student selector' label while it is in the 'out' position and it will slide back in.

- b) You can also use the traditional 'Alt-S' search process. To use this press Alt-S on the keyboard and a small search window will appear. Begin typing the name of the student for whom you are searching and those with matching names will be listed.

To illustrate this I'll add several students to the database.....and then, when I press Alt-S and type the letters 'al', the following is displayed.



The first nine students in the list will be numbered and, when you spot the student required, just press that number and they will be displayed. Alternatively, click on their name. If only one student is displayed they can be selected simply by pressing the <Enter> key.

This second way is the fastest way to find a student as the mouse is not required. Simply press Alt-S, followed by the first few letters of the family name, then the number beside their name.

If you click 'From CM' (or [From Kamar') then the students in the school database will continue to be displayed until you click 'From Gateway'.

Right, that's it for students. Now let's look at placements.

3.3 Placements

Students may have placements and courses. To manage a student's placements click on the second tab labelled 'Placements' and the following screen will appear.

At the top of the screen is a table listing the student's placements. To view the details of an existing placement click on it in this table and its details will be displayed on the rest of the screen.

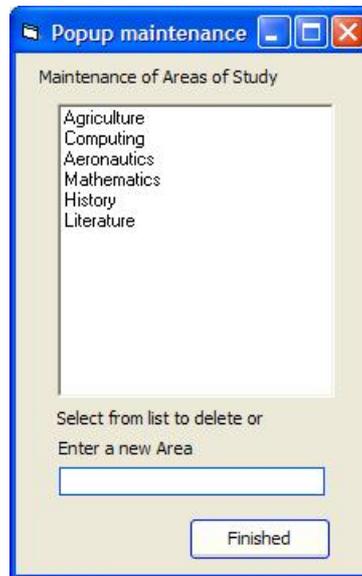
On the left of the screen are the employer details. On the right are details relating to the timing of the placement. Below that is an area where individual student costs relating to the placement may be recorded. At the bottom of the screen is a list of the unit standards involved in the placement.

At the far right of the screen is a pull-out bar which displays information relating to the forms connected with this placement and whether or not they have been signed.

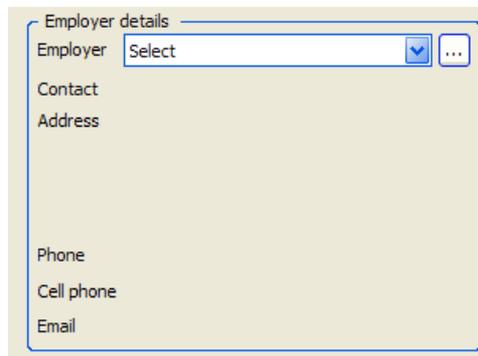
Let's take these areas in the above order.

a) Placement title and area of study

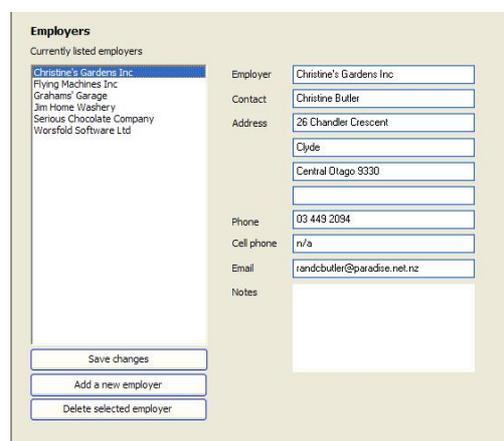
Enter the title of the placement in the field provided and select the Area of Study from the popup list. The 'Three dots' button allows you to edit the list of 'Areas of Study' via a popup window, shown below. This is the same routine as that detailed in the previous chapter on 'Configuration'. You can add a new 'Area of study' from here too.



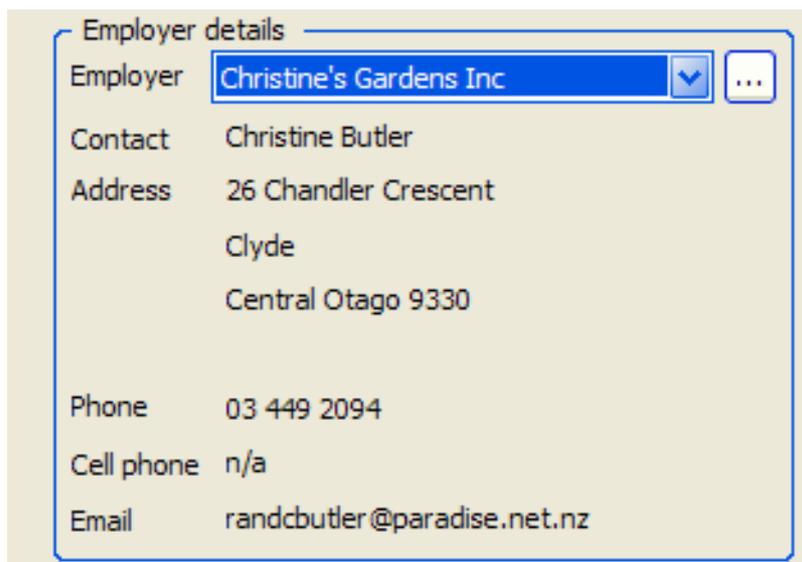
b) Employer details



Select the employer from the popup list at the top of this area. Again, the 'three dots' button allows you to specify a new employer right here, in a manner similar to that in the 'Configuration' area as described in the previous chapter. If you click on the button the following screen will appear.



Record the new employer (if necessary) and click on the 'Close' button to return to the student's placements screen. Now you can select the employer and their details will be displayed, as shown below.

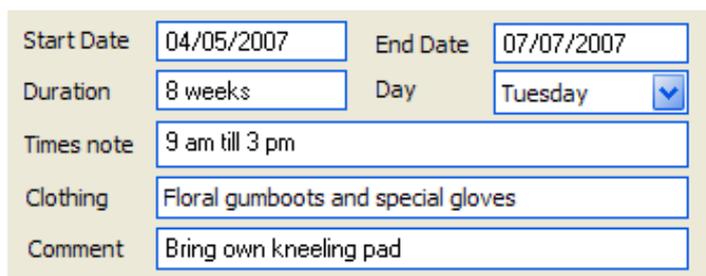


The screenshot shows a window titled "Employer details" with a light beige background and a blue border. At the top, there is a dropdown menu for "Employer" with "Christine's Gardens Inc" selected and a small "..." button to its right. Below this, the following fields are displayed:

Contact	Christine Butler
Address	26 Chandler Crescent Clyde Central Otago 9330
Phone	03 449 2094
Cell phone	n/a
Email	randcbutler@paradise.net.nz

c) Placement dates and times.

This area, shown below, is where you record information relating to the timing of the placement, an example of which is shown below.



The screenshot shows a form with the following fields:

Start Date	04/05/2007	End Date	07/07/2007
Duration	8 weeks	Day	Tuesday
Times note	9 am till 3 pm		
Clothing	Floral gumboots and special gloves		
Comment	Bring own kneeling pad		

Note that, whenever you are entering a date you may enter e.g. '4/5/7' and the program will convert it to the correct format '04/05/2007'.

d) Withdrawn from placement

If a student withdraws from a placement then you can record that information in this area, including the date withdrawn.

have done this the program will search the units in the database and, if found, its details will be recorded on the table and you will be asked to specify the provider.

For example, Unit number 1 version 5 is being taken by the student so '1' and '5' are entered ...

Unit standards for this placem		
Unit	Version	Title
1	5	

... and, on pressing <Enter> the following popup window appears....

Provider	Code	Loc.
James Adams	4323	3
Jim's Garage	4455	6
Plunket NZ	8389	2
PORSE	8224	1
Porse ECE Training	8224	1
Rorys school	5544	3
Tonaga Quarries	5567	3
Travel Careers and Training	8706	2
UNITEC	6004	1
University of Auckland	7001	1

... from whence you can either select the provider or, if they are not currently listed, click on the 'Add or edit the list of provider' button. This takes you to the following screen :

Provider	Code	Loc.
James Adams	4323	3
Jim's Garage	4455	6
Plunket NZ	8389	2
PORSE	8224	1
Porse ECE Training	8224	1
Rorys school	5544	3
Tonaga Quarries	5567	3
Travel Careers and Training	8706	2
UNITEC	6004	1
University of Auckland	7001	1

Provider name: Central Otago Polytech

Provider number (e.g. 225): 4416

Location code (e.g. 5): 2

Note that location numbers are required for providers of unit standards

Once you've added your new provider, click the 'close' button to return to the

previous provider selection screen and select the unit provider. Their details will be added to the display as shown below.

Unit	Version	Title	Level	Credits	Result	Provider	Code	Locatio	Cost
1	5	Prepare and sow c	1	5		Central Otago Polytech	4416	2	

You can add the cost of the unit standard in the right hand column, once it is known.

You can hover the cursor over the unit title to see it in full.

Unit	Version	Title	Level	Credits	Result	Provider	Code	Locatio	Cost
6	2								35.00

ii) The other way of selecting unit standards is to click on the button labelled 'Select Unit Standards' in the bottom right hand corner of the screen. This causes a list of the standards in the database to be displayed from where you can select one or more standards which, on completion, will be added to the display of unit standards for the placement.

Code	Ver	Title
1	1	Prepare and sow outdoor seedbeds m
1	2	Prepare and sow outdoor seedbeds m
1	3	Prepare and sow outdoor seedbeds m
1	4	Prepare and sow outdoor seedbeds m
1	5	Prepare and sow outdoor seedbeds m
4	1	Maintain hand tools and service small e
4	2	Maintain hand tools and service small e
4	3	Maintain hand tools and service small e
4	4	Maintain hand tools and service small e
4	5	Maintain hand tools and service small e
12	1	Handle wire
12	2	Handle wire
12	3	Handle wire
12	4	Handle wire
14	1	Demonstrate knowledge of elementary
14	2	Demonstrate knowledge of elementary
14	3	Demonstrate knowledge of soil propert
14	4	Demonstrate knowledge of soil propert
14	5	Demonstrate knowledge of soil propert
15	2	Prepare and sow outdoor seedbeds m

Add selected standards Hide

Select the standards required and click 'Add selected standards'.

Unit	Version	Title	Level	Credits	Result	Provider	Code	Locatio	Cost
1	5	Prepare and sow c	1	5		Central Otago Polytech	4416	2	35.00
4	4	Maintain hand tool	1	3		Central Otago Polytech	4416	2	25.00
12	3	Handle wire	2	2		Central Otago Polytech	4416	2	16.00
14	4	Demonstrate know	2	4		Central Otago Polytech	4416	2	26.00

In the centre of the table above you will notice three columns which display the unit standard levels, credits and results. When a student has achieved a particular standard you should enter 'A' in the result column. Possible entries in this column are :

N = Not achieved (i.e. was assessed and failed to pass')

A = Achieved

Y = Attended assessment but failed to attempt it

X = Withdrawn from this unit standard

A completed table might have entries such as :

	Level	Credits	Result	Provi
l sow c	1	5	A	Centr
nd tool	1	3	A	Centr
	2	2	N	Centr
e know	2	4	A	Centr

You will notice that the 'Total placement cost' now displays the total of the student costs and the unit standards costs.

Total placement cost		143.94
	Cost	
s	35.95	
	5.99	
Code	Locatio	Cost
4416	2	35.00
4416	2	25.00
4416	2	16.00
4416	2	26.00

g) The placement forms.

Move your cursor over the blue 'Forms signed' bar on the right hand side of the placements screen and the window shown below will appear.

S
D
T
C
C
St
C
C

Forms signed

Roses for Spring

Gateway Student Contract signed

Gateway Placement Agreement signed

Gateway Agreement signed

Gateway Medical Declaration signed

Gateway Work Place Learning Opportunity Parent/Legal Guardian Consent signed

Gateway Programme Parent/Caregiver Permission and Agreement form signed

Gateway Learning Plan

Date form sent to TEC

result Provider Code Locatio Cost

There are seven documents associated with each placement and you can print each from this screen. Once each has been printed and signed you can tick the relevant box for each to record the facts.

The forms themselves have been pre-designed for you but you may edit each via the Word Processing option under the List Printing process, as detailed in the following chapter.

Click 'Close' on the blue panel when you've finished with this pop-out window.

Finally, the three buttons at the bottom of the screen allow you to :

- i) Add a new placement
- ii) Delete the displayed placement
- iii) Save changes to the current placement.

This brings us to the end of placements. Let's now turn our attention to the other possibility for a student, the courses they've attended as a part of this Gateway Programme.

3.4 Courses

Click on the 'Courses' tab at the top of the screen and the 'Courses' screen will be displayed as shown below.

Overview Placements **Courses** Achievement summary Costs summary Notes Medical Details

Courses attended This student also has 1 placements Add a course

Course	Start date	End date	Duration	Provider	Contact	Phone	Cell

Course details

Title Provider
 Start date Contact
 End date Phone
 Duration Cell
 Times note Email
 Course cost

Course costs Total cost

Date	Item

Course unit standards

Unit	Version	Title	Level	Credits	Result	Cost

Course other assessments

Outcome	Abbreviation	Result	Cost

Forms signed

At the top of the screen is a table listing the courses taken by the student.

Below that on the left are the course title and timings information area. To the right of this is the 'costs' area. At the bottom of the screen are two tables. The first lists any unit standards involved in the course and the second lists any 'other assessments' (such as certificates, or even just 'attendance') relating to the course.

The blue bar at the right leads to a 'documents signed' area. At the time of writing there are no documents associated with courses but we are ready if and when the time comes. At the bottom of the screen is a button whereby you can delete the displayed course from a student.

Courses are a little different from placements. Placements are very student specific, with a particular placement being designed or specified just for the student concerned.

Courses, on the other hand, are defined at a higher level and several students may take the same course, e.g. a First Aid course as a part of their placements.

To add a new course to a student select it from the popup list in the top right hand corner of the screen. Initially, of course, (sorry), there will be no courses specified. You can rectify this by clicking on the small 'three dots' button to the right of the courses popup.

Add a course

This will cause the following screen to be displayed.

Setting up courses

Course title Provider ...

Current courses

Start date Code

End date Location

Duration Contact

Times note Phone

Cost/student Cell phone

Email

Course unit standards

Unit	Version	Title	Level	Credits

Course other assessments

Objective	Code

You can edit a previously defined course here by selecting it from the list of courses in the top left hand corner of the screen. Alternatively, click 'Add a new course' to clear the screen ready for the specification of a new course.

Fill in the course details at the top of the screen, selecting a provider from the popup list in the top right hand corner of the screen. (Click the 'three dots' button to edit the list of providers as detailed in earlier parts of this chapter.)

The bottom half of this screen is where you can specify

- a) the unit standards associated with the course. These can, as detailed for placements, be specified in two different ways :
 - i) By typing the number and version in to the first two columns of the table.
 - ii) By using the 'Select Unit Standards' button to cause a list of standards to be displayed.
- b) Any 'Other assessments' associated with the course. Other assessments may include certificates or any other means of assessment you wish to record for the course in question

Once done, your screen might appear similar to this.

Unit	Version	Title	Level	Credits
6400	3	Manage first aid in emergency situations	3	2
6401	3	Provide first aid	2	1
14471	3	Provide extended first aid	4	6
12720	2	Demonstrate knowledge of bones, muscles, and	5	5

Course other assessments

Objective	Code
First Aid Certificate	FA1

Returning to the student (by clicking the 'Close' button in the bottom left hand corner of the screen), you can now select the course from the popup list. Now the students screen will display the course as shown below.

Courses attended This student also has 1 placements Add a course

Course	Start date	End date	Duration	Provider	Contact	Phone	Cell
First Aid	04/04/2007	30/12/1899	5 weeks	St John	Mary Allen	449 2119	027 987 6543

Course details

Title	First Aid	Provider	St John
Start date	04/04/2007	Contact	Mary Allen
End date	30/12/1899	Phone	449 2119
Duration	5 weeks	Cell	027 987 6543
Times note	7pm on Tuesday evenings	Email	mary@xtra.co.nz
Course cost	25.00		

Course costs Total cost 25.00

Date	Item

Course unit standards

Unit	Version	Title	Level	Credits	Result	Cost
6400	3	Manage first aid in emergency situations	3	2		
6401	3	Provide first aid	2	1		
14471	3	Provide extended first aid	4	6		
12720	2	Demonstrate knowledge of bones, muscles, and skele	5	5		

Course other assessments

Outcome	Abbreviation	Result	Cost
First Aid Certificate	FA1		

You will notice two columns in each of the tables for Results and Costs. Results may be entered once they are known.

For unit standards possible results are :

- N = Not achieved (i.e. was assessed and failed to pass')
- A = Achieved
- Y = Attended assessment but failed to attempt it

- X = Withdrawn from this unit standard

For 'Other assessments' results can be :

- N = Not completed
- Y = Completed / Passed
- X = Withdrawn from this assessment

The second column allows you to add any cost relating to the unit standard or other assessment.

The only other area on this screen yet to be discussed is that relating to student-specific costs. You can already see the basic course cost displayed under the 'Time details' area. This second area allows you to add further costs individual to this student not included in the basic course cost and not a unit standard cost. E.g. Transport.

You will notice that there is no 'Save changes' button on this screen. All changes are automatically saved as they are made. (Yes, I do intend to carry the same process through to placements in the near future)

Once everything is complete the screen might appear as:

Courses attended This student also has 1 placements Add a course ...

Course	Start date	End date	Duration	Provider	Contact	Phone	Cell
First Aid	04/04/2007	30/12/1899	5 weeks	St John	Mary Allen	449 2119	027 987 6543

Course details

Title	First Aid	Provider	St John
Start date	<input type="text" value="04/04/2007"/>	Contact	Mary Allen
End date	<input type="text" value="30/12/1899"/>	Phone	449 2119
Duration	<input type="text" value="5 weeks"/>	Cell	027 987 6543
Times note	<input type="text" value="7pm on Tuesday evenings"/>	Email	mary@xtra.co.nz
Course cost	<input type="text" value="25.00"/>		

Course costs Total cost: 132.70

Date	Item	Cost
01/04/2007	Transport	15.60

Forms signed

Course unit standards

Unit	Version	Title	Level	Credits	Result	Cost
6400	3	Manage first aid in emergency situations		3	2 A	14.50
6401	3	Provide first aid		2	1 A	18.60
14471	3	Provide extended first aid		4	6 A	25.00
12720	2	Demonstrate knowledge of bones, muscles, and skele		5	5 A	21.00

Course other assessments

Outcome	Abbreviation	Result	Cost
First Aid Certificate	FA1	Y	13.00

3.5 Achievement Summary

This tab provides an overall summary of this student's achievement in relation to his or her placements and courses.

Rory Butler is pursuing the following units standards and

Unit	Versic Title	Level	Credits	Placement/course	Result
1	5 Prepare and sow outdoor seedb	1	5	Roses for Spring	A
4	4 Maintain hand tools and service	1	3	Roses for Spring	A
12	3 Handle wire	2	2	Roses for Spring	N
14	4 Demonstrate knowledge of soil p	2	4	Roses for Spring	A
6400	3 Manage first aid in emergency si	3	2	First Aid	A
6401	3 Provide first aid	2	1	First Aid	A
14471	3 Provide extended first aid	4	6	First Aid	A
12720	2 Demonstrate knowledge of bone	5	5	First Aid	A

Unit Standards Progress

Level 1 Taken	Level 1 Achieved	Level 2 Taken	Level 2 Achieved	Level 3 Taken	Level 3 Achieved
8	8	7	5	2	2

Other outcomes

Outcome	Abbreviation	Course	Result
First Aid Certificate	FA1	First Aid	Y

It lists all unit standards and the results obtained, followed by a level by level summary of credits. This is followed by a list of 'Other assessments'

This information may be printed for each student as detailed in the following chapter.

3.6 Costs Summary

This tab displays a summary of all of the costs incurred by the student in pursuit of their placements and courses.

Rory Butler has incurred the following costs.

Placement / course	Date	Item	Cost	Total cost
Roses for Spring				
Student costs	01/05/2007	Floral gumboots	35.95	
	01/05/2007	Garden gloves	5.99	
Unit Standard costs				
U/S 1 v 5			35.00	
U/S 4 v 4			25.00	
U/S 12 v 3			16.00	
U/S 14 v 4			26.00	143.94
First Aid				
Basic cost			25.00	
Student costs	01/04/2007	Transport	15.60	40.60
Grand total costs				184.54

This information may be printed for each student as detailed in the following chapter.

3.7 Notes

This tab accesses a screen where you can record notes relating to this student.

Notes Use this area to enter any notes concerning Butler, Rory Hugh

Rory has been a model student in that he has remained small and inactive at all times during his placement and course work.
We cannot believe that this sperm beat over six million others!

3.8 Medical Details

The final tab accesses the medical details screen for the student, where you can record the necessary information, an example of which is shown below.

Medical details

Emergency Contact Details

Name	<input type="text" value="Lindsay Mayo"/>	Student Details	
Relationship	<input type="text" value="Mother"/> ...	Home phone	<input type="text" value="03 449 2094"/>
Phone	<input type="text" value="03 698834"/>	Cell phone	<input type="text"/>
Cell phone	<input type="text" value="n/a"/>		

Doctor Details

Name	<input type="text" value="Accident/Medical"/> ...
Address	750 Victoria Street Hn
Phone	834 0333

Medical details

Medical Conditions	<input type="text" value="Asthma, Whooping cough and Mumps"/>		
Medications	<input type="text" value="Constant supply of valium"/>		
Tetanus injection received	<input checked="" type="radio"/> Yes <input type="radio"/> No	Date of last Tetanus injection	<input type="text" value="03/04/1951"/>
Other relevant information	<input type="text" value="Loves riding in Ambulances."/>		

Before leaving this chapter there is one more detail which requires explanation.

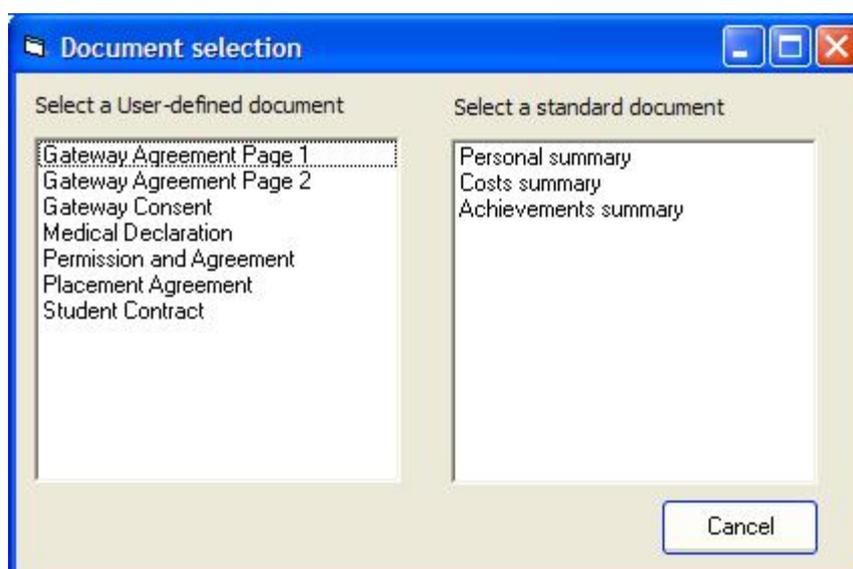
At the bottom left hand corner of the screen are five buttons.



The first four have obvious purposes :

- a) Add a new student
- b) Delete the currently displayed student
- c) Save changes – made to the student. (This button will become red when changes have been made which have not yet been saved.
- d) Search for a student. You can use this button if you prefer not to press Alt-S – which pops up the student search screen.

The last, Print a document, leads to the following screen.



On the left are seven standard documents which can also be printed from the Placements tab 'Forms signed' pull-out window. These can only be printed successfully if a particular placement is currently displayed on the screen. (So, why is this routine here? Well, it was written prior to developing the 'Forms signed' pullout – which seemed a much better way to do it – but it was then a pity to remove the original process)

This screen does, however, provide a useful way of enabling you to print the documents on the right hand side of the screen. An example of the 'Personal summary' is shown below.

College	Date 16/02/2008
Gateway summary for Rory Hugh Butler	
Year : 11	NSN : 1234565439
Placement : Roses for Spring	
Area of student : Agriculture	Start Date : 04/05/2007
Employer : Christine's Gardens Inc	End Date : 07/07/2007
Contact : Christine Butler	Duration : 8 weeks
Address : 26 Chandler Crescent Clyde	Phone : 03 449 2094
Central Otago 9330	Cell : n/a
Total placement cost : \$143.90	
Unit Standards	
Number of unit standards studied : 4	Unit standards passed : 3
Number of credits sought : 14	Credits gained : 12
Course : First Aid	
Provider : St John	Start Date : 04/04/2007
Contact : Mary Allen	End Date : 30/12/1899
Phone : 449 2119	Duration : 5 weeks
Cell : 027 987 6543	
Total course cost : \$94.70	
Unit Standards	
Number of unit standards studied : 4	Unit standards passed : 4
Number of credits sought : 14	Credits gained : 14
Other outcome : First Aid Certificate	Passed : Yes
Total cost for Rory Hugh Butler : \$238.60	

Chapter 4

Print Lists

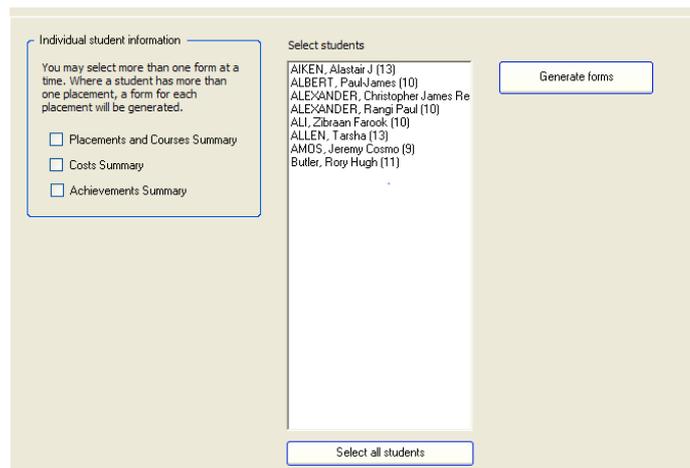
What's in this chapter?	Page
4.1 Individual student forms	4.2
4.2 Pre-designed lists	4.4
4.3 MOE returns	4.5
4.4 Document design and printing	4.5

The 'Print Lists' button provides access to a list printing utility via which you can produce a range of lists in a variety of formats, the Ministry of Education Returns and the Document design and Printing utility. The main printing screen is shown below, with the four buttons down the left hand side of the screen.



4.1 Individual Student Forms

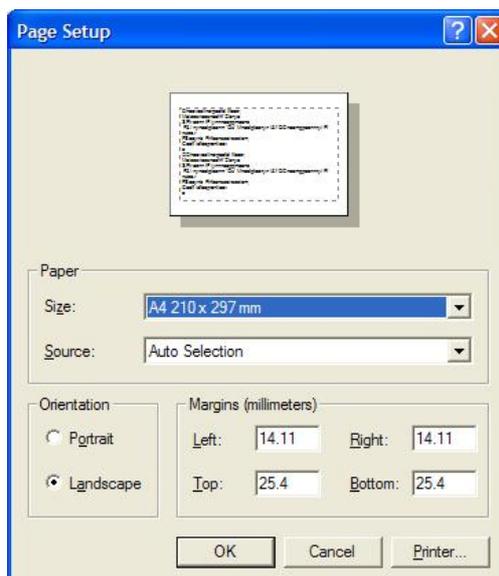
This option is used to print one or more of the standard summaries for one or more students. The main screen for Individual Student forms is shown below.



The screenshot shows a software interface for selecting students and generating forms. On the left, under 'Individual student information', there is a text box explaining that multiple forms can be selected for a student with multiple placements. Below this are three checkboxes: 'Placements and Courses Summary', 'Costs Summary', and 'Achievements Summary'. In the center, a list of students is displayed, including names and course numbers (e.g., AIKEN, Alastair J (13)). At the bottom of the list is a 'Select all students' button. On the right, there is a 'Generate forms' button.

Select those forms which you wish to print by ticking the boxes on the left hand list. Then select the student or students required from the list of students in the centre of the screen. (Use the 'Select all students' button at the bottom of the list to select all (or De-select all) students. Finally, click the 'Generate forms' button and you will proceed to printing.

When you click to 'Generate' a list or form or document, the following window will appear....



The screenshot shows a 'Page Setup' dialog box. It features a preview window at the top showing a document page. Below the preview, there are settings for 'Paper' (Size: A4 210 x 297 mm, Source: Auto Selection), 'Orientation' (Portrait and Landscape options), and 'Margins (millimeters)' (Left: 14.11, Right: 14.11, Top: 25.4, Bottom: 25.4). At the bottom, there are 'OK', 'Cancel', and 'Printer...' buttons.

... via which you can select a different printer etc. Usually you will simply click 'OK' without further thought. (N.B. The Orientation' format can not be used to change the

format of the output as this is determined within the program according to the design chosen.

Examples of the three forms are shown below.

a) Placement and Courses Summary

This is the same as that generated via the print button on the Student screen as described in the last chapter.

College		Date 16/02/2008
Gateway summary for Rory Hugh Butler		
Year : 11 NSN : 1234565439		
Placement : Roses for Spring		
Area of student : Agriculture	Employer : Christine's Gardens Inc	Contact : Christine Butler
Address : 26 Chandler Crescent	Clyde	Central Otago 9330
Start Date : 04/05/2007	End Date : 07/07/2007	Duration : 8 weeks
Phone : 03 449 2094	Cell : n/a	
Total placement cost : \$143.90		
Unit Standards		
Number of unit standards studied : 4	Number of credits sought : 14	Unit standards passed : 3 Credits gained : 12
Course : First Aid		
Provider : St John	Contact : Mary Allan	Phone : 449 2119
Cell : 027 987 6543	Total course cost : \$94.70	
Start Date : 04/04/2007	End Date : 30/12/1899	Duration : 5 weeks
Unit Standards		
Number of unit standards studied : 4	Number of credits sought : 14	Unit standards passed : 4 Credits gained : 14
Other outcome : First Aid Certificate	Passed : Yes	
Total cost for Rory Hugh Butler : \$238.60		

b) Costs summary

Again, this is the same as that generated from the Student's screen.

Gateway Costs Summary for Rory Hugh Butler		
Year: 11 NSN: 1234565439		
Placement : Roses for Spring		
Student costs		
Date	Detail	Cost
01/05/2007	Floral gumboots	35.95
01/05/2007	Garden gloves	5.99
Unit Standard costs		
U/S 1 Ver 5		35.00
U/S 4 Ver 4		25.00
U/S 12 Ver 3		16.00
U/S 14 Ver 4		26.00
Course : First Aid		
Course cost		25.00
Student costs		
Date	Detail	Cost
01/04/2007	Transport	15.60
Unit Standard costs		
U/S 6400 Ver 3		14.50
U/S 6401 Ver 3		18.60
U/S 14471 Ver 3		25.00
U/S 12720 Ver 2		21.00
Other outcome		
First Aid Certificate		13.00
Total cost for Rory Hugh Butler : \$276.64		

c) The achievements summary

The same applies!

Gateway Achievements summary for Rory Hugh Butler						
Year : 11 NSN : 1234565439						
Placement : Roses for Spring						
Unit Standard	Version	Title	Level	Credits	Result	Credits gained
1	5	Prepare and sow outdoor seedbeds manually	1	5	A	5
4	4	Maintain hand tools and service small engines	1	3	A	3
12	3	Handle wire	2	2	N	
14	4	Demonstrate knowledge of soil properties	2	4	A	4
Course : First Aid						
Unit Standard	Version	Title	Level	Credits	Result	Credits gained
6400	3	Manage first aid in emergency situations	3	2	A	2
6401	3	Provide first aid	2	1	A	1
14471	3	Provide extended first aid	4	6	A	6
12720	2	Demonstrate knowledge of bones, muscles, and skeletal tissues of the human body	5	5	A	5
Other outcome					Result	
First Aid Certificate					Passed	
Total unit standard results						
Standards studied	8	Standards passed	7	Credits sought	28	Credits gained
					26	

4.2 Pre-designed lists

This option is used to print lists of students showing details according to the choice made from the main printing screen below.

Lists of students

- Basic student information only
- Include placements and courses
- Include unit standards and other assessments
- Costs of placements and courses
- Unit standards summary
- Unit standards summary final lines
- Medical contacts
- Medical contacts and details
- List of employers
- List of employers with placements

Two sample entries from the lists are shown below.

Include Placements and Courses :

Butler, Rory Hugh	Year : 11 NSN : 1234565439	26 Chandler Crescent Clyde Central Otago	Home : 03 449 2094 Cell : Email : randoobutler@paradise.net.nz	Gender Male Ethnicity : European
Placement : Roses for Spring	Area of study : Agriculture	Christine's Gardens Inc 26 Chandler Crescent Clyde Central Otago 9330	Christine Butler Ph : 03 449 2094 Cell : n/a	Start date : 04/05/2007 End date : 07/07/2007
Course : First Aid		Provider : St John (7854)	Contact : Mary Allen Ph : 449 2119 Cell : 027 987 6543	Start date : 04/04/2007 End date : 30/12/1899

Costs of Placements and Courses :

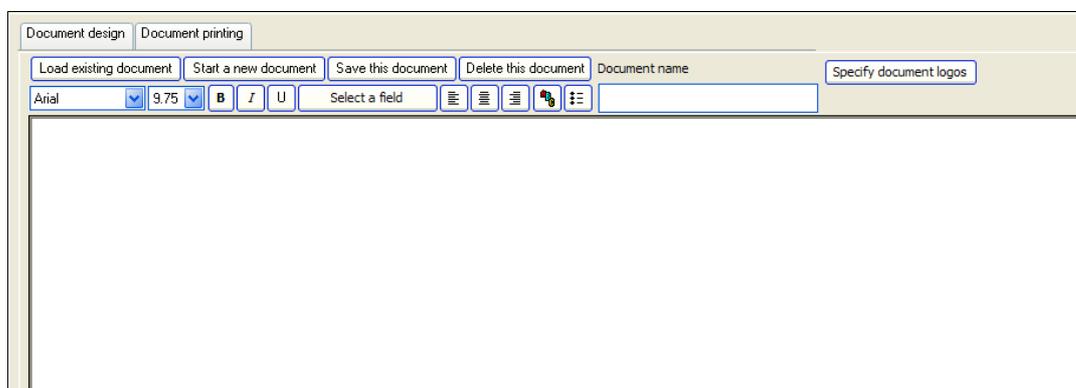
Butler, Rory Hugh									
Personal details		Year: 11 NSN: 1234565439	26 Chandler Crescent Clyde Central Otago		Home : 03 449 2094 Cell : Email : randoobutler@paradise.net.nz		Gender Male Ethnicity : European		
Placement : Roses for Spring		Total student costs		41.94		Total unit standard costs		102.00	
Course : First Aid		Course cost	25.00	Student costs	15.60	U/S costs	79.10	Outcome costs	13.00
Total costs for Butler, Rory Hugh								Combined total	143.94
								Combined total	132.70
								Combined total	276.64

4.3 MOE Returns

This option has not been finalised at the time of printing this manual and will be included as soon as it has been completed.

4.4 Document Design and Printing

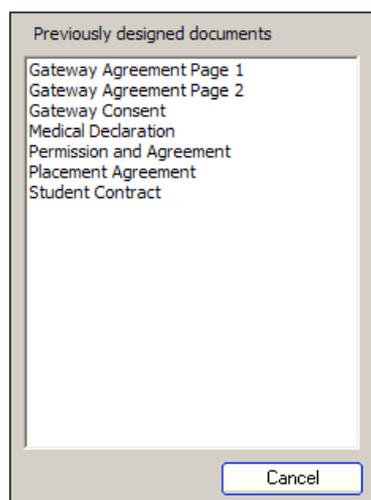
This option is used to design student-centric documents and to print them for one or more students at a time. The main screen has two tabs and initially appears as shown below.



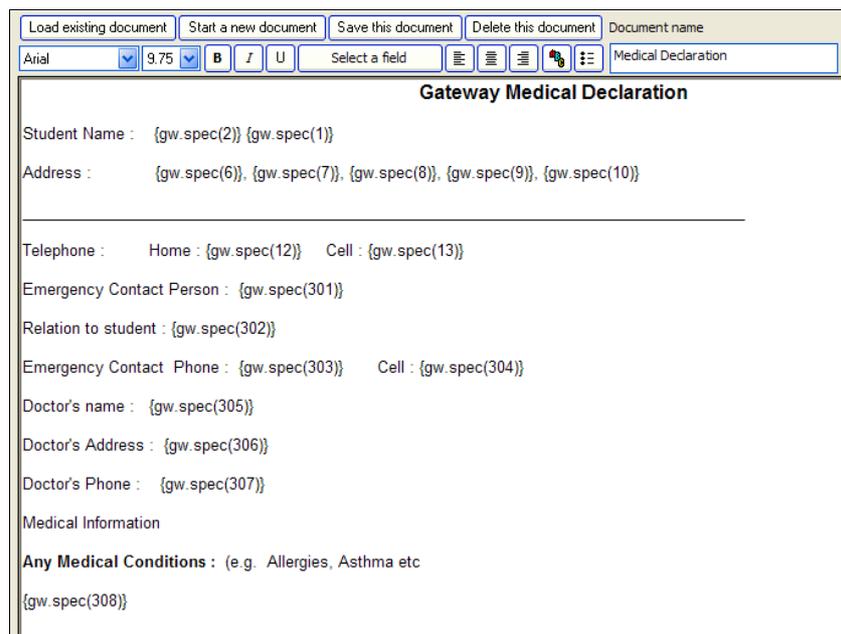
The tab displayed is the first tab – Document Design.

Designing a document

If you have previously designed documents (and you DO – as the package has several) then you can select one to edit by clicking on the 'Load existing document' button. A small window will appear via which you can select the design in question.



If, for example, 'Medical declaration' is selected, then you will return to the document design screen which will now appear as :



Load existing document Start a new document Save this document Delete this document Document name

Arial 9.75 B I U Select a field Medical Declaration

Gateway Medical Declaration

Student Name : {gw.spec(2)} {gw.spec(1)}

Address : {gw.spec(6)}, {gw.spec(7)}, {gw.spec(8)}, {gw.spec(9)}, {gw.spec(10)}

Telephone : Home : {gw.spec(12)} Cell : {gw.spec(13)}

Emergency Contact Person : {gw.spec(301)}

Relation to student : {gw.spec(302)}

Emergency Contact Phone : {gw.spec(303)} Cell : {gw.spec(304)}

Doctor's name : {gw.spec(305)}

Doctor's Address : {gw.spec(306)}

Doctor's Phone : {gw.spec(307)}

Medical Information

Any Medical Conditions : (e.g. Allergies, Asthma etc
{gw.spec(308)}

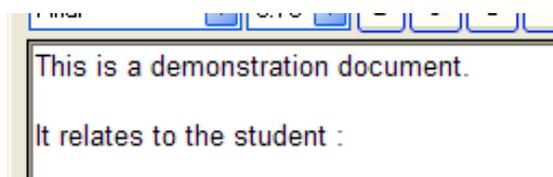
The document contains a number of codes (e.g. {gw.spec(1)}) which will be

translated at the time of printing into the relevant information for the student for whom the document is being printed.

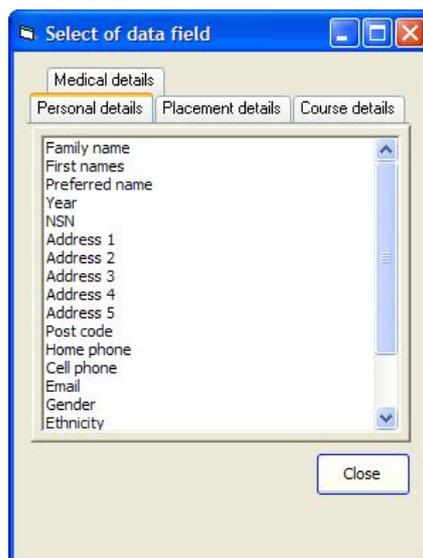
As an example, let's start a new document and design it. Click on the button labelled 'Start a new document' and give it a title on the right hand side of the screen : e.g. 'Demonstration'



Now let's enter a little text...

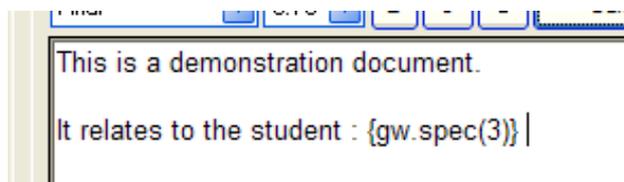


... and we've already come to the spot where we wish to insert the code for the student's name. To do this, click on the button labelled 'Select a field' and the following window will appear.

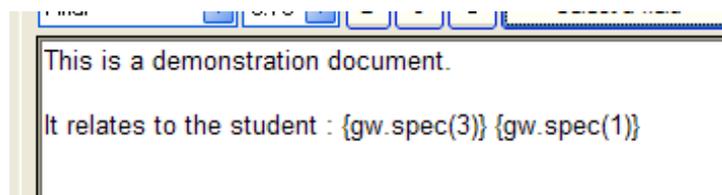


There is the student's name, right at the top of the list on the "Personal Details" tab.

Click on the 'Preferred name' entry and the code will be inserted into the document at the point of the cursor.



Click on the same button again and select the family Name....



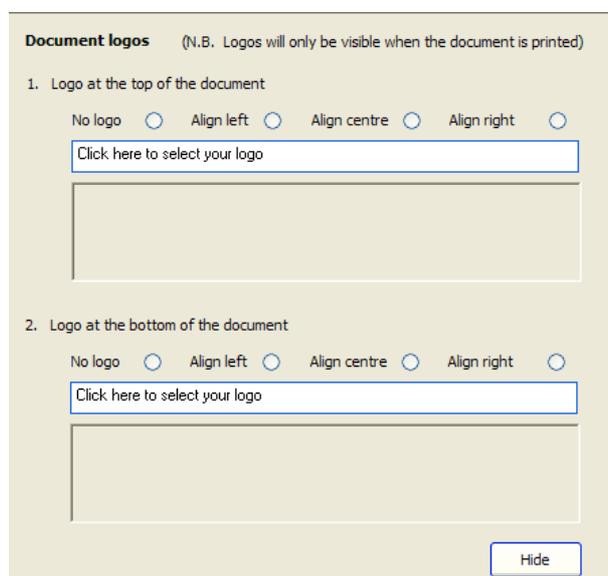
... and that's all there is to it.

There are four tabs, each of which contain selectable fields. The fields on the 'Placements' and 'Courses' tabs cannot be determined when printing unless you are on the student's screen and a Placement or a Course is currently selected. However, to allow for this the printing routine (described shortly) does attempt to cope by printing multiple documents for each student as necessary to deal with multiple placements and/or courses.

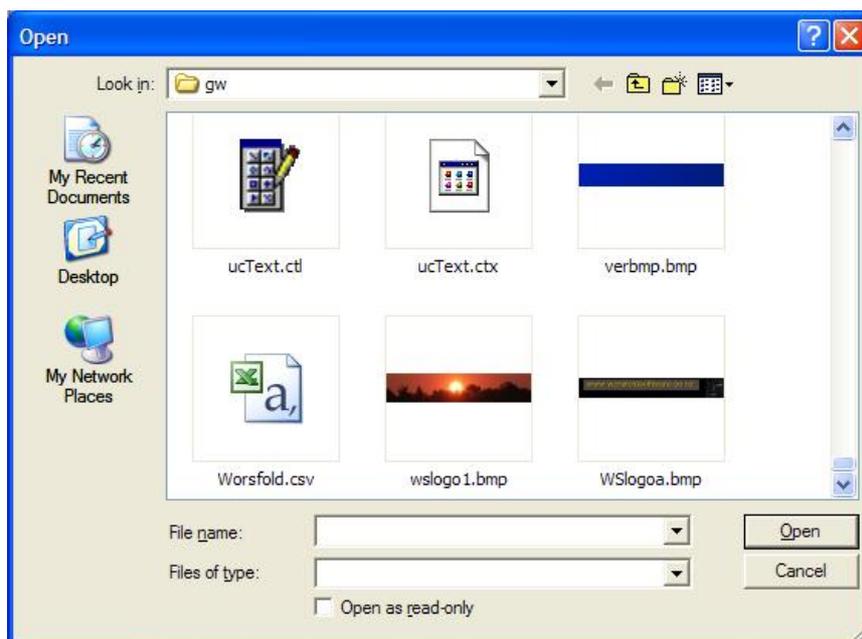
Click on the button labelled 'Save this document' to have the details recorded in the database.

You can use the next button labelled 'Delete this document' to do just that.

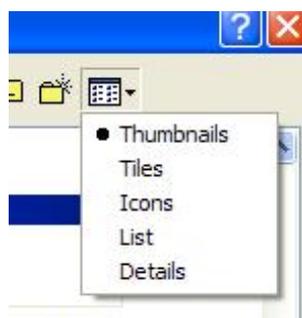
The final large button allows you to place up to two logos on your document, one at the top and one at the bottom. Click on this button and the following screen is displayed.

A screenshot of a configuration window titled "Document logos" with a note: "(N.B. Logos will only be visible when the document is printed)". The window contains two sections for configuring logos. Section 1 is "1. Logo at the top of the document" and section 2 is "2. Logo at the bottom of the document". Each section has four radio buttons: "No logo", "Align left", "Align centre", and "Align right". Below the radio buttons in each section is a button labeled "Click here to select your logo" and a large empty rectangular box for the logo. At the bottom right of the window is a "Hide" button.

To insert a logo at the top of the document click in the area labelled 'Click here to select your logo'. Logos MUST be available in the \gw directory and should be either .bmp or .jpg files (Bitmaps or Jpegs). When you click in the area the standard Windows file selection dialogue is displayed ...



... via which you can select your logo. (Remember to select 'Thumbnails' from the menu shown below on the dialogue screen so that you can choose your logo by its image.)



As an example, the old Worsfold Software 'Sunrise' logo has been selected, and you will be returned to the logo specification screen as shown below. Hmm, it looks fairly large! Have your IT people supply you with one suitable for use on A4 paper.

Never-the-less, we shall persevere and see what it looks like.



The final step is to select the 'Alignment' position by selecting from the line just above the logo.



If you select 'No logo' then any logo selected will be removed.

Click 'Hide' when you've finished specifying your logo(s) and you will return to the document design screen.

At the top of the Word Processor area are several small buttons, the purpose of each of which is detailed below.



These buttons and areas allow you to specify :

- The font
- The font size
- Toggle Bold for selected text
- Toggle Italics for selected text

- Toggle Underline for selected text
- Select a field – you’ve already met that one.
- Left align selected text
- Centre align selected text
- Right align selected text
- Select a colour for selected text
- Have selected text indented with bullets.

The last of these was used in the design of the standard documents and it was quite fun working out how to double-space bulleted text. (You have to press Ctrl-Enter at the end of a bulleted line twice then back up and remove a floating bullet and one of the lines. It can be done!)

Finally, before moving to printing, a word of warning about the word processor. It was distributed some time ago by Microsoft who have not supported it since it was released, and there is a bug! If you do some cutting and pasting of text you might suddenly find that letters of the alphabet can no longer be typed, or that inserted codes lose their letters and appear as simply {.}. If this happens then the only remedy seems to be to save you document in its present form, to exit from the program and to re-enter and reload your document. It’s a pain, but its beyond the control of a humble programmer.

Printing documents which you’ve designed.

The second tab on the document screen takes you to the printing routine.

The screenshot shows a software window titled 'Word Processing - document printing' with two tabs: 'Document design' and 'Document printing'. The 'Document printing' tab is active and contains four steps:

- Step 1 Select the document:** A list of document types including Demonstration, Gateway Agreement Page 1, Gateway Agreement Page 2, Gateway Consent, Medical Declaration, Permission and Agreement, Placement Agreement, and Student Contract.
- Step 2 Select the students:** A list of student names and counts, such as AIKEN, Alastair J (13), ALBERT, Paul James (10), ALEXANDER, Christopher James (10), ALEXANDER, Rangi Paul (10), ALI, Zibraan Farook (10), ALLEN, Tarsha (13), AMOS, Jeremy Cosmo (9), and Butler, Rory Hugh (11).
- Step 3:** A checkbox labeled 'Print multiple copies where a document is found to have references to placements or courses and the student has more than one placement or course'.
- Step 4:** Two buttons: 'Select all students' and 'Print the documents'.

The printing process is relatively simple. All you have to do is to

- a) Select the document which you wish to print
- b) Select the student or students for whom you wish to print
- c) Tick the box to request multiple documents in the case where a document has codes which link to a placement or to a course and a student for whom you are printing has more than one placement or course.
- d) Click the button labelled 'Print the documents'

The usual pre-printing screen will pop up followed by a display of the documents. Let's, for example, print our specially designed demonstration....

Word Processing - document printing

Step 1 Select the document

- Demonstration
- Gateway Agreement Page 1
- Gateway Agreement Page 2
- Gateway Consent
- Medical Declaration
- Permission and Agreement
- Placement Agreement
- Student Contract

Step 2 Select the students

- AIKEN, Alastair J (13)
- ALBERT, Paul-James (10)
- ALEXANDER, Christopher James (10)
- ALEXANDER, Rangil Paul (10)
- ALI, Zibraan Farook (10)
- ALLEN, Tarsha (13)
- AMOS, Jeremy Cosmo (9)
- Butler, Rory Hugh (11)

Step 3

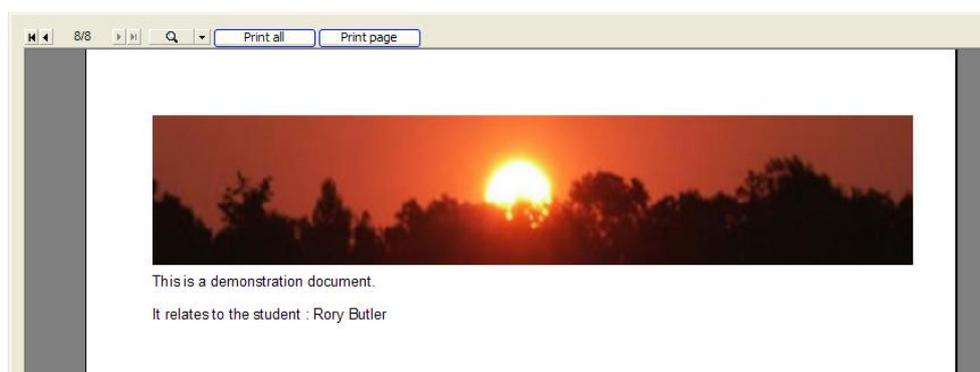
Print multiple copies where a document is found to have references to placements or courses and the student has more than one placement or course

Step 4

De-select all students

Print the documents

.. and the screen will appear as :



To our great relief, our logo looks good!

At the top of the printing screen are several small buttons which may be used as

follows :



The document we are viewing is the 8th of 8. The arrow buttons can be used to move backwards and forward through the multiple pages.

The magnifying glass can be used to enlarge or reduce the document in its viewing window – but there is a better way. To enlarge the document simply double left-click on it. To reduce it double right-click. If a document is now too large to fit in the window you can drag it around by holding the mouse down and moving the document.

You can use the final two buttons to either 'Print all' of the documents or just 'Print page' – i.e. print the currently displayed page.

Chapter 5

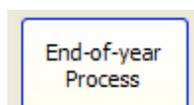
The Utilities

What's in this chapter?	Page
5.1 The End-of-Year process	5.1
5.2 Making or restoring a backup	5.4
5.3 Emailing your database	5.6
5.4 Data Export	5.9
5.5 Import NZQA Unit Standards	5.12

5.1 The End-of-year process

Each year the Gateway Management package uses a different database. The database is named according to the year, e.g. gw2007.mdb

At the end of each year you must prepare for the new year by running the end-of-year rollover process. Click on the first of the five utilities buttons :



The following screen will appear.

End-of-Year processes

Please read the following explanation carefully

The end-of-year process involves making a copy of your current database for the new year. (Remember that you will ALWAYS be able to reaccess any previous year's database.) It also removes entries from the current database so that you can use it afresh for the new year.

This process can be repeated as often as your wish. If you do it more than once then, each subsequent time you do it, the configuration files (such as Doctors, Employers, Providers ect) will be updated from your old year's database to the new year. This means that if you changes some configuration details in the old year AFTER having done this process once, you can still update the new year's database wityh the new entries from the old year's database.

All students, their placements and their courses will be removed. All of your configuration items such as Employers, Doctors, Emergency relationships etc will be kept for the new year. Remember that you can always return to a previous year to revisit the students and their results from that year.

Proceed

As detailed on the illustration above, the end-of-year process involves the following :

A copy will be made of your current year's database and it will be renamed for the new year. (You can always return to any previous year, via the menu item 'Select database' at the top of the main screen.)

The next step is to remove those entries from the database which will not apply to the new year. This will be the names of the students, their placements, courses and results.

Providers, doctors and other popups will retain their contents and any documents you have designed will also be carried forward to the new year.

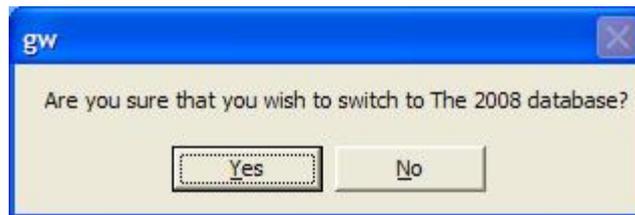
Once you are ready to proceed, click on the 'Proceed' button and it will all happen remarkably quickly. A message such as that shown below will appear to confirm that it has been done.



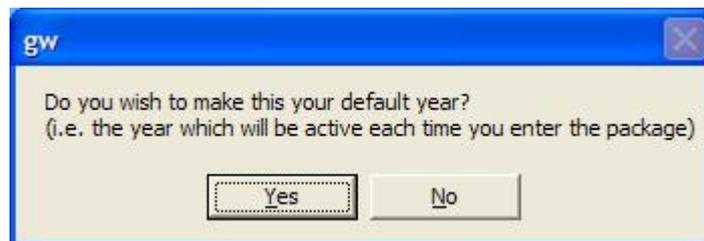
Now, if you go to the menu item mentioned above – to 'Select database' – at the top of the main screen, you will find that you have a new choice.



Select the new year's database and the following question will be asked :



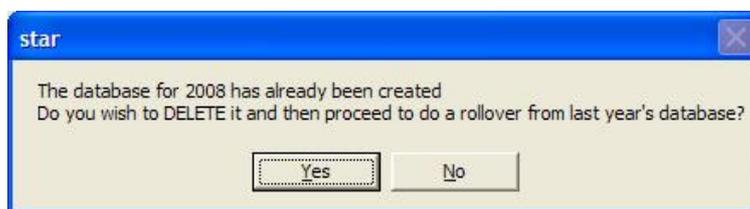
Presumably you do, so click 'Yes'. You will then be asked if you wish to make this new year the default year i.e. the year which will be selected each time you enter the package. At some stage you will reply 'Yes' to this question. This process allows you to switch back to a previous year on a temporary basis.



Once a year has been selected it will be displayed at the top of the main screen, thus:



If you attempt to perform the end-of-year rollover after having already carried out the end-of-year process then the database for the new year already exists and the following option will occur.



If you reply 'Yes' then the existing database for the new year will be DELETED along with all of its contents, and the end-of-year process will be repeated as described above.

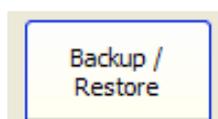
If you reply 'No' to the Delete option then you will proceed to the end-of-year process where the screen will display the following message.

N.B. This process HAS already been performed, so only the configuration files will be updated.

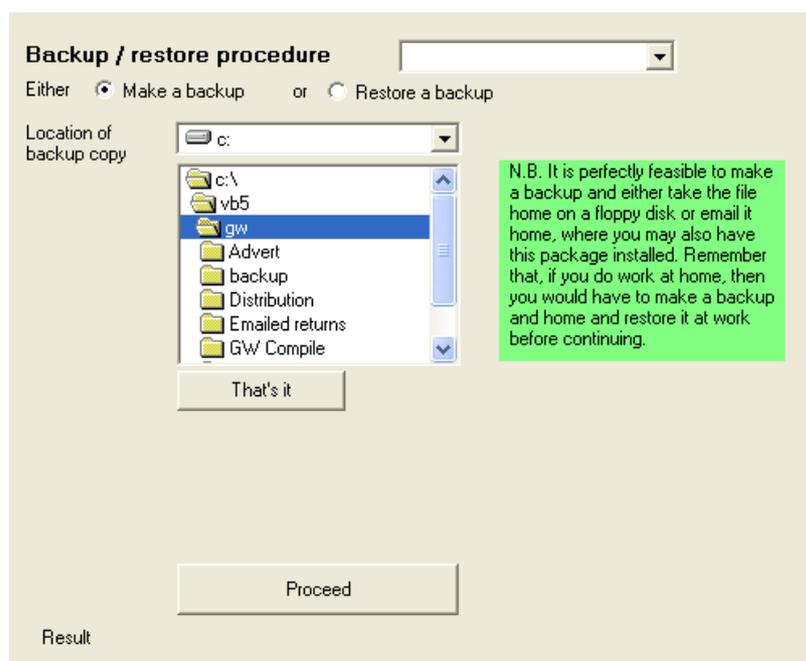
If you proceed then only the configuration parts of the database will be updated e.g. doctors, employers, documents etc. Any students, placements, courses or results in the new year's database will be left untouched.

5.2 Making or restoring a backup

The third utilities button ...



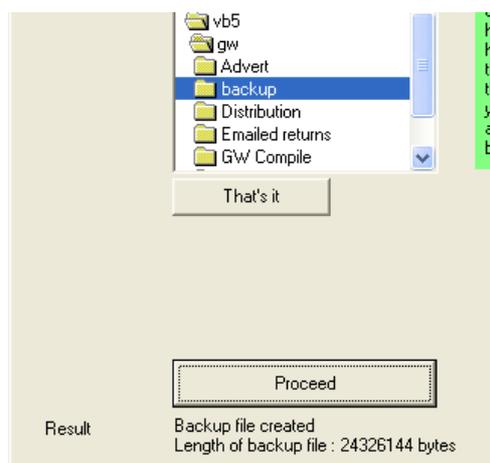
... leads you to the following screen :



Near the top of the screen are two option buttons which allow you to decide whether it is a backup or a restore which you are wishing to do. The screen above illustrates the former.

a) Making a backup

Select the location for your backup file and, when ready, click 'Proceed'. Once the process has been completed the results will be displayed below the 'Proceed' button e.g.



Note the message in the green box on the screen :

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 at home and restore it at work before continuing.

b) Restoring a previously made backup

Click on the second option button near the top of the screen and the restoration process screen, shown below, will be displayed. The only difference is the inclusion of a list of existing backups found in the nominated directory, shown at the bottom of this screen.

Backup / restore procedure

Either Make a backup or Restore a backup

Location of backup copy: c:\

- vb5
- gw
- backup

That's it

Select back to restore

Backup file
The name of the file is
gwddmmyyyy.mdb
e.g.
gw11062007.mdb

gw17022008.mdb

Proceed

Result

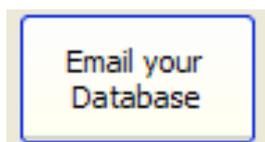
N.B. It is perfectly feasible to make a backup and either take the file home on a floppy disk or email it home, where you may also have this package installed. Remember that, if you do work at home, then you would have to make a backup and home and restore it at work before continuing.

Use the directory listing above to identify the location of the backup file which you wish to restore, and click 'That's it' when you have done so. Any backups found in that location will be listed below.

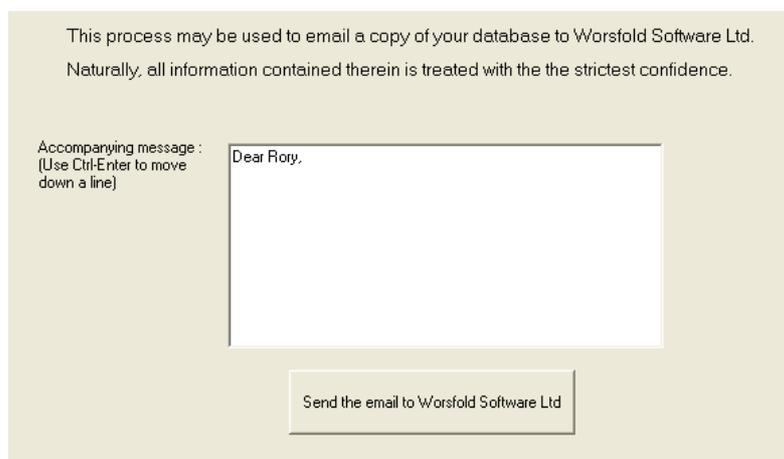
Select the backup file which you wish to restore and click on the 'Proceed' button. The backup will be unpacked and restored to your \gw directory and the information concerning this will be displayed at the bottom of the screen.

5.3 Emailing your database to Worsfold Software

Should you experience a problem with the package then it may be necessary to forward a copy of your database to Worsfold Software Ltd to enable the exact cause to be identified and corrected. The need for this step will be decided through discussion with the author. Should it be necessary then click on the button :



... and the following screen will be displayed :



All that you should be required to do is to enter a suitable message (e.g. Please check out Automotive Engineering as I have 5 standards attached but only four are appearing on the spreadsheet) and click on the 'Send' button.

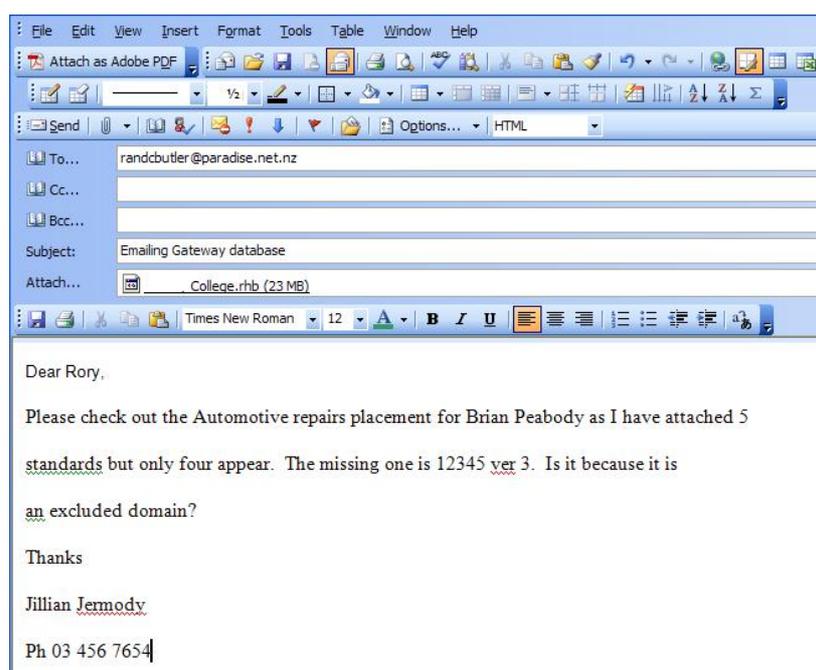
This SHOULD take you to your email software, with a renamed file named using your school name and ending in .rhb as an attachment.

A message concerning this will be shown :



The process makes a copy of your database, renames it, compresses it, and sends it as an attachment to your email program. In testing, I have sometimes found that the process of attaching the zip file can be somewhat unreliable. It's success

depends on the settings for your email program. Should all go well then the screen should appear as e.g. :



Note the attachment – democollege.rhb - to which the arrow is pointing above.

Note also that your lovely message did not come through with line feeds. You might like to adjust that before sending.... But its not essential. What IS essential is the attachment. If there is no attachment then please attach the zip file which will be named 'yourschoolname.rhb' and will be found in your \gw directory. To attach it click on the paper clip icon and navigate to the \gw directory.

My experience of many years with databases suggests that the arrival of a backup usually makes solving a particular problem relatively simple.

Sometimes this whole process does not work. It may depend on the security aspects of your school network. If all else fails and you need to send me a backup then please :

- a) Use Windows Explorer to navigate to your \gw directory. (You can find out where it is by right-clicking on your desktop Gateway shortcut and selecting 'Properties'. Look at the 'Start in' information in the middle of the properties screen.)
- b) Once you have found the directory, find the database, which will be called e.g. gw2008.mdb. Right-click on it and select 'Copy'. Then right-click near it in the directory in white space and select 'Paste'. This will result in a file named e.g. 'Copy

of gw2008.mdb'. Right-click on this file name and select 'Rename' and rename the file to e.g. 'rongotai.rhb'.

c) Send me this renamed copy. Right-click on it and select 'Send to' then select 'Mail recipient'. This will take you through to your email program.

d) My email address is randcbutler@paradise.net.nz

e) 'Send' the email, along with an explanation of what you are wishing me to have a look at.

5.4 Data Export

This option is used to enable you to export data from the Gateway database.

The screen appears as shown below.

Previously designed export formats will be listed down the left hand side of the screen and you can either use one of these or design a new export format.

To design a new format follow these steps :

a) Click on the button labelled 'Start a new export design'.

b) Give your new export design a name in the text box just below the "Start a new export design' button.

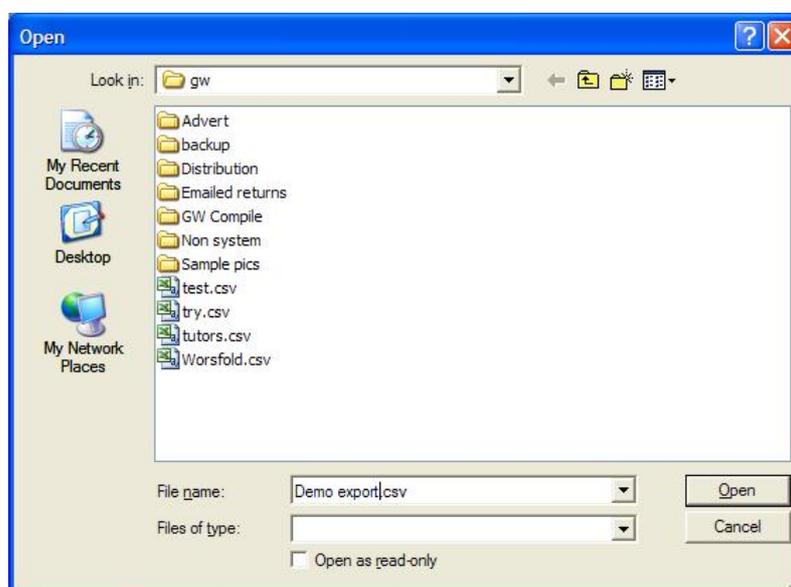
c) Select those fields which you wish to export for each student. This is done by selecting entries from the 'Field selector' in the second column above. There are four tabs from which you can select fields. In the example below several fields have been selected from the 'Personal details' tab, followed by some from the 'Medical details' tab.

As fields are selected they are listed in the third column.

To remove a selected field click on it in the third column and you will be asked to confirm your wish to delete it.

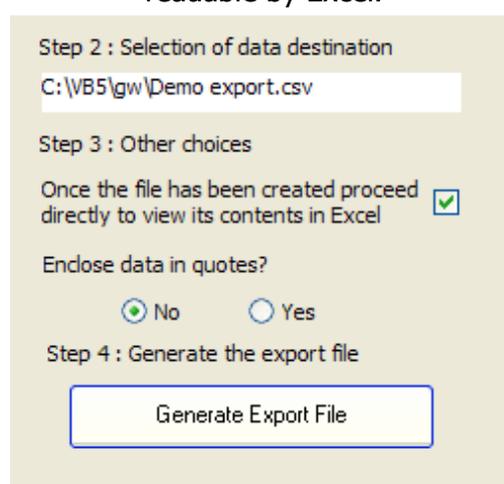
The screenshot displays a software window titled "Or" with the subtitle "Design a new export format". It features a "Start a new export design" button and a "Title" field containing "Demonstration export". Below this, it says "... and select the required data fields" and shows four tabs: "Course details", "Medical details", "Personal details", and "Placement details". The "Personal details" tab is active, showing a list of fields: "Emergency contact", "Relationship", "Phone", "Cell phone", "Doctor", "Doctor address", "Doctor phone" (highlighted in blue), "Medical conditions", "Medications", "Tetanus injection?", "Date injected?", and "Other medical details". To the right, a "Selected fields" list contains: "Family name", "First names", "Year", "Number of placements", "Number of courses", "Doctor", "Doctor address", and "Doctor phone". A "Save your export design" button is at the bottom.

d) The next step (Step 2 on the screen) is to provide the name and location of the file which will be generated. To do this click in the area labelled 'Click here to select your output file'. When you click the standard windows file specification dialogue will appear as shown below.



For this demonstration the file name 'Demo export.csv' has been entered and the directory has been left as the \gw directory where gateway resides, as shown in the next screen capture. (I got sick of typing 'below')

The file extension '.csv' stands for 'Comma separated variables' and means that the data, when exported, will be separated by commas. This makes the export file readable by Excel.



e) Indicate whether or not you wish to proceed directly to Excel once the file has been created, and also whether or not you wish to have the exported data enclosed in quotes. The reason for this is that some data may already contain commas and after being exported, the commas caused confusion with those added during the export. Enclosing each item of data in quotes enables Excel to manage embedded commas.

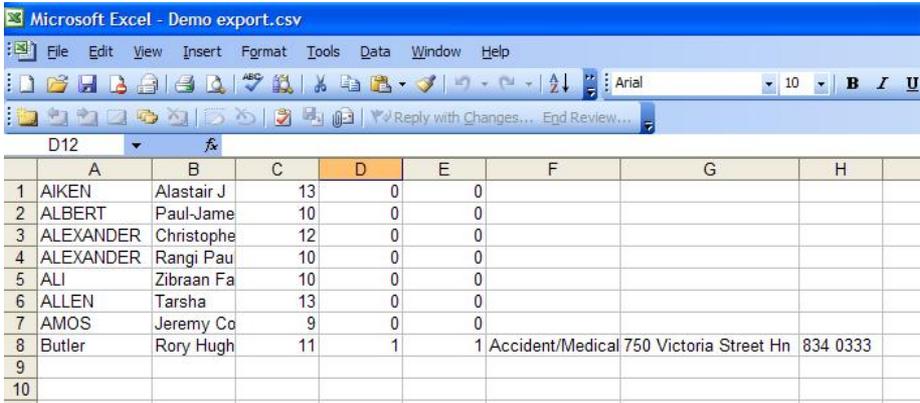
At this point your design is complete and, should you wish to keep it for future use

you should click on the button labelled 'Save your export design' which will be glowing red in a desperate attempt to attract your attention.

f) Finally, Generate the export file. An entry from the export above will appear in the files as :

Butler,Rory Hugh,11,1,1,Accident/Medical,750 Victoria Street Hn,834 0333

And, when viewed in Excel :



	A	B	C	D	E	F	G	H
1	AIKEN	Alastair J	13	0	0			
2	ALBERT	Paul-Jame	10	0	0			
3	ALEXANDER	Christophe	12	0	0			
4	ALEXANDER	Rangi Pau	10	0	0			
5	ALI	Zibraan Fa	10	0	0			
6	ALLEN	Tarsha	13	0	0			
7	AMOS	Jeremy Co	9	0	0			
8	Butler	Rory Hugh	11	1	1	Accident/Medical	750 Victoria Street Hn	834 0333
9								
10								

5.5 Import the latest Unit Standards from NZQA

Each release of this package will include the current version of the file of unit standards provided by NZQA. This utility is used to import standards from this file directly into the database so that they are then available for connection to courses.

The screen for the process is shown below. Listed on the screen are the excluded domains. Unit standards from these domains will not be imported as they cannot be attached to placements and courses.

Import the latest unit standards from NZQA

To carry out this process you must have obtained the file 'standards.txt' from NZQA. This process will extract the latest versions of units standards from that file into your star database.

Please ensure that the file 'standards.txt' from NZQA has been copied into your \star directory.

The file 'standards.txt' dated 17/05/2007 has been found in your star directory.

Proceed to import unit standards

Please note that during the import process the left hand list may appear to freeze. The process is still proceeding.

Please note : This process will take a few minutes to import over 50,000 versions of the units standards.

To import the new standards, click on the 'Proceed to import unit standards' button and the process will begin. It does take a couple of minutes as there are many thousands of units to import.

A routine has been put in the package to automatically check for a new file of unit.standards from NZQA each time you enter the package. If a new file is found then a message will provide you with the option to process directly to this import routine and to begin the process automatically.

Chapter 6

Using the web site

What's in this chapter?	Page
6.1 Using the Worsfold Software web site	6.1

6.1 Using the Worsfold Software web site

Early in 2005 a web site was established to enable users of the Worsfold Software packages to stay up to date with both the latest enhancements and the latest version.

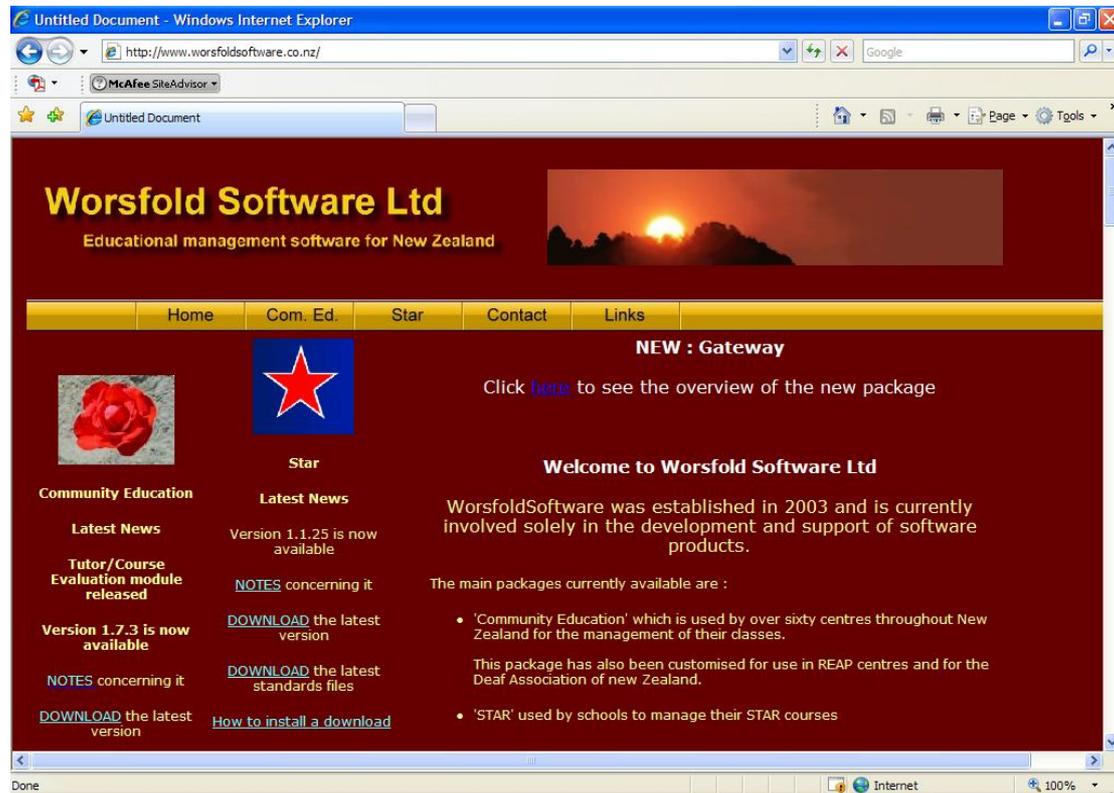
If, for some reason, you discover a fault in the software then please check the web site first. It may very well be that others have discovered it before you and it has already been rectified and made available.

The name of the web site is : www.worsfoldsoftware.co.nz

N.B. At the time of writing the website has not yet been modified to include Gateway information. This will happen very shortly, after which time this chapter will be rewritten and emailed to schools.

If you require to download a new version then check for a link to the gateway Download on the front screen. After saving the download to your desktop the installation process is identical to that for STAR, as described below.

The 'Home' page is shown below.



Users of Gateway should keep an eye on the left hand Gateway panel (Not visible above...), 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.

Watch for a similar Gateway link.



See the [notes concerning it](#)
Go straight to [download](#)
['How do download' instructions](#)

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



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



The third button on this screen takes you to the STAR page, shown below.



Worsfold Software Ltd

Home

Star Course Manager

Cost of the package : 2006/7 : \$95 + G.S.T. plus \$75.00 + G.S.T. per year User Group support

View brochure View The STAR brochure page

Latest changes Read about the latest changes to the package

Downloads Download the latest version or the manual

Order Order the package for your school

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.



Worsfold Software Ltd

Star Course Manager

Home STAR

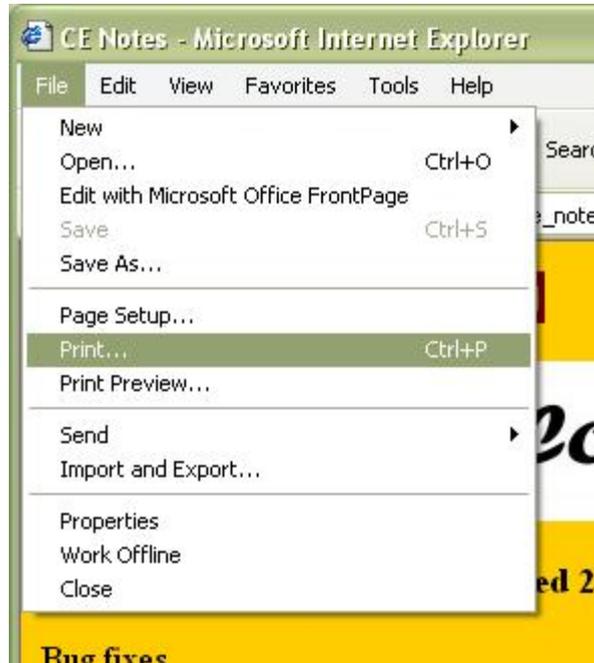
Version 1.1.1 Released 15th October 2006 Download the new version here

Latest changes to Worsfold Software's STAR Course Management software

There are no extra notes to date, as this is the first release of the package.

Return here from time to time to read about the latest enhancements.

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 is that which accesses the download screen. This is available via both the link on the STAR screen and the link on the notes screen.



The download screen appears as shown below.

A screenshot of a web page for Worsfold Software Ltd. The page has a blue background. At the top left is a banner with a sunset image and the text 'Worsfold Software Ltd'. At the top right is a logo for 'Star Course Manager' featuring a red star. Below the banner are two buttons: 'Home' and 'STAR'. The main content area has a light blue background and contains the following text:

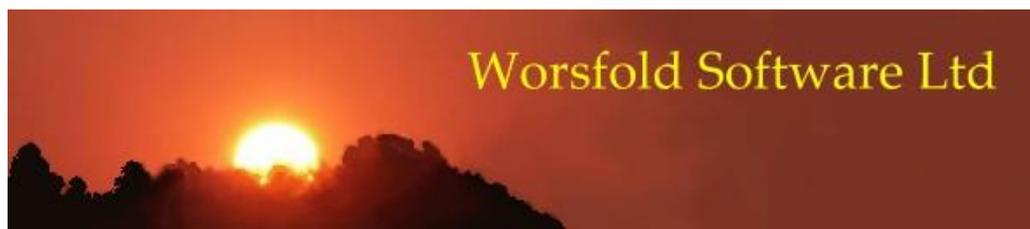
For instructions of [how to download](#) click [here](#)

There are three downloads available

1. Download the STAR on-line help manual [Download](#) Last updated 15/10/2006
It's best to 'Save' the download to e.g. your desktop and then open it.
2. Download the latest version of the program file 1.1.1 [Download](#) Last updated 15/10/2006
N.B. This is suitable for existing users only. It is NOT suitable for those wishing to preview the package.
Save the download to e.g. your desktop then unzip it into your \star directory.
3. Download the program installation file. [Download](#) Last updated 15/10/2006
Save the download to e.g. your desktop and run it from there to install the package.

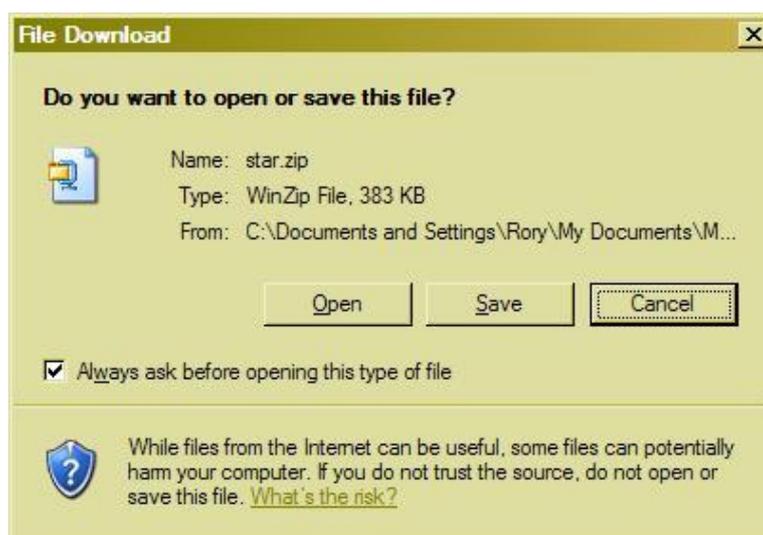
The download required is the second one – the latest version of the program file.

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

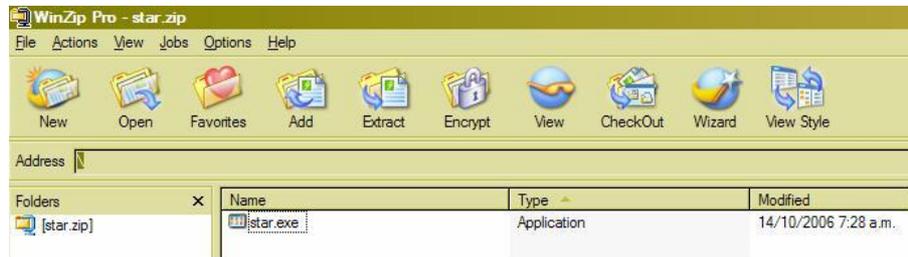


How to install from the download (in three easy steps!)

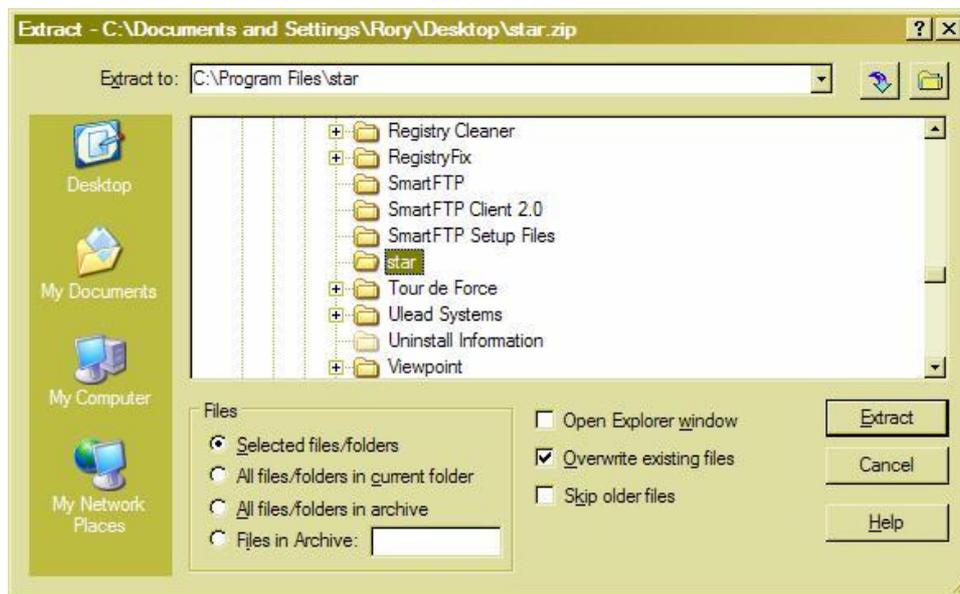
1. Exit from the package if it is currently running.
2. Click on the 'Download' button. A dialogue will ask you if you wish to 'Open' or 'Save' the file. I've always preferred to 'Save' as, if the installation needs to be repeated, or I wish to install in more than one place, then 'Save'ing the download 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 star.zip. When you double-click on it, it will open into 'Winzip', as shown below.



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



If you do not know where your \star 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:\star) 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. star2005.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.

This brings us to the end of the manual.

Please feel free to contact the author to suggest enhancements to the package and/or the manual.

Contact details :

Phone 03 449 2094

Email : randcbutler@paradise.net.nz

Index

A

Access database	1.1
Access rights	2.3
Achievement Summary	3.18
Areas of Study	2.7

B

Backup	5.4
Bitmaps or Jpegs	4.9

C

Classroom Manager	3.3
Codes	4.6
COMPPL32.DLL	1.3
Configuration	2.1
Configuration	2.3
Conventions	vii
Copyright	v
Costs	3.5
Costs Summary	3.18
Costs summary	4.3
Courses	3.13
CPWCTL32.OCX	1.3

D

Data Export	5.9
Designing a document	4.6
Doctors	2.9
Document design	4.5
Document printing	4.5
Download latest version	6.6

E

Editing Users	2.2
Emailing your database	5.6
Employer details	3.5
Employers	2.8
End-of-year process	5.1
Entry code	1.14

F

Finding a student 3.4

G

gwreg.lic 1.14

I

Import standards 5.12

Individual Student Forms 4.2

install from the download 6.7

Installation 1.2

Installation 1.4

Installation problems 1.3

K

KAMAR 2.6

Kamar 3.3

L

Latest changes 6.5

license v

Logos 4.8

M

Medical Details 3.19

MOE number 2.6

MOE Returns 4.5

MUSAC 2.4

MUSAC's Classroom Manager 2.4

N

Networking 1.4

Notes 3.19

NZQA 5.12

O

Other assessments' results 3.17

P

Password	1.14
Passwords	2.2
Placement and Courses Summary	4.3
Placement costs	3.9
Placement forms.....	3.12
Placements - Withdrawn from	3.8
Placements	3.5
Popup.Entries	2.6
Predesigned.lists	4.4
Print Lists	4.1
Printing documents	4.11
Provider selection	3.11
Providers	2.8

R

Restoring a previously made backup	5.6
Results for unit standards	3.12

S

Search for a student	3.20
Setting up	2.1
Shortcut	1.12
Student - seaching for	3.4
Student selector	3.4
Student's programme	3.2
Students	3.1
Subsequent licensing	1.15
System files	1.2
System files	1.4
System files	1.5

T

The achievements summary	4.4
--------------------------------	-----

U

UNC path names	2.5
Unit Standards - importing latest	5.12
Unit standards	3.5
Utilities	5.1

W

Warranty	v
----------------	---

Web site 6.2