

---

Guide

# School Setup

Win School®  
Version 4.2

© 2000 Chancery Software Ltd.

Written by Monica Kahut of Chancery Software Ltd.

Information in this document is subject to change and does not represent a commitment on the part of Chancery Software Ltd. For up to date information, call Customer Service at 1-800-999-9931.

CSL, Win School, and eClass are registered trademarks of Chancery Software Ltd.

Open District and District Data Integrator are trademarks of Chancery Software Ltd.

# Contents

<b>INTRODUCING SCHOOL SETUP .....</b>	<b>1</b>
Overview .....	1
Getting Technical Support.....	2
Providing Feedback.....	2
<b>USING SCHOOL SETUP .....</b>	<b>3</b>
Overview .....	3
Using School Setup .....	3
Opening Dialogs.....	3
Printing Data .....	4
Printing the Settings Report .....	4
Printing the District Trailing Spaces Report .....	4
Using the Edit District List button .....	5
Establishing a Data Standard.....	5
Entering Short Codes and Descriptions.....	5
Merging List Items .....	6
Extended Tab Editor.....	6
<b>PREPARING TO SET UP A SCHOOL.....</b>	<b>7</b>
Overview .....	7
Preparing for the Next Year .....	7
<b>SETTING UP A SCHOOL .....</b>	<b>8</b>
Overview .....	8
Passwords Menu.....	8
System Passwords .....	8
eClass Attendance Passwords .....	10
eClass Grades Password.....	11
Details List Access .....	11
School Menu .....	11
Localize .....	11
Student Address Format .....	12
District Names.....	12
School Names.....	13
School Information.....	13
School Year .....	14
Define Grade Levels .....	14
Transfer Recording.....	15
Withdrawal Inactive Day .....	16
Year Round School .....	16
Year Round Tracks .....	16
Details Lists Menu.....	16
Creating Lists for Popup Menus.....	16

Scheduler Menu .....	19
Set Scheduler Terms .....	19
Timetable Structure .....	20
Teacher Course Load .....	21
Reservation Labels .....	22
Period Labels and Block Labels .....	22
Scheduling Drop Date .....	23
Scheduling Aide Types .....	23
Report Cards Menu .....	23
Report Card Bins .....	23
Edit Points & Credits Table .....	24
Attendance Menu .....	26
Attendance Structure .....	26
Daily and Period Attendance Codes .....	26
Reporting Terms For Attendance .....	28
Define Day Types .....	28
Daily Calendar .....	29
Rooms Menu .....	31
Room Types .....	31
Room Setup .....	32
Room Clone .....	33
User Defined Fields, Flags, Codes, and Lists .....	33
Courses Menu .....	35
Course Numbers .....	35
Course Types .....	35
Course Subject Areas .....	35
Teachers Menu .....	36
Teacher Position .....	36
Student - General Menu .....	36
Student Numbers .....	36
Normal and Special Programs .....	37
Student Groups .....	37
Ethnic Categories .....	38
Home Languages .....	38
Lunch Status .....	38
Contact Relationship .....	38
Transportation .....	38
Student Age Reporting Date .....	39
Student - Codes/Actions Menu .....	39
Entering Codes .....	39
Custom Tabs Menu .....	40
Defining Custom Tab Items .....	40
Health Menu .....	42
District Extract Menu .....	42
District Extract Setup .....	42
Bins for District Use .....	42
District Replication Menu .....	43
Bins for District Use .....	43
Tabs Menu .....	43
Naming and Defining Custom Tabs .....	43
Using Multi-Data Tab Designer .....	44
Exporting Tab Templates .....	45
Importing Custom and Multi-Data Tab Definitions .....	46

<b>TROUBLESHOOTING</b> .....	<b>48</b>
You cannot add a new course in Course Details .....	48
You receive an error message about unassigned relative days.....	48
<b>GLOSSARY OF TERMS</b> .....	<b>49</b>
<b>INDEX</b> .....	<b>51</b>



# Introducing School Setup

---

## Overview

School Setup consists of data entry dialogs where you enter basic information about your school and how it operates. This information is used by other Win School modules. For example:

- All the student, teacher, class, and resource data entered in the Details module is based on School Setup data.
- Attendance codes and information entered in School Setup determine how attendance is counted in the Attendance module.

If you are new to Win School, work through each procedure in this guide in order. The information you enter depends on your school's needs and on the Win School modules you use. After the first year, you will only need to make minor changes to the data.

See your State or Province guide to see if any settings or special features apply to your state or province.

---

## Getting Technical Support

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

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

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

---

## Providing Feedback

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

# Using School Setup

---

## Overview

This section describes the basic features of School Setup:

- starting School Setup
- opening Dialogs and Saving Data
- printing Data
- establishing Data Standards
- working with Popup Lists
- using Short Codes
- merging List Items

After you establish how you are going to use Win School, including data standards, use School Setup functions in any order.

---

## Using School Setup

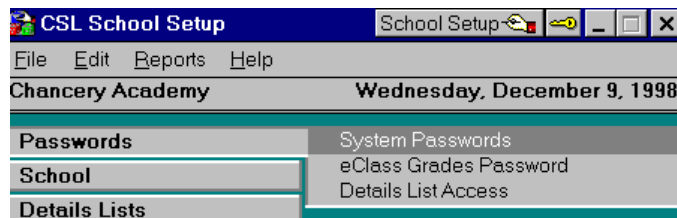
Become familiar with the basic features and conventions of School Setup before entering data.

### Opening Dialogs

You must open a dialog to enter any information in School Setup.

#### To open dialogs:

- 1 Click a menu item. A sub-menu appears.



- 2 Double-click a sub-menu item or highlight it and press Enter.

#### To save data:

- Click OK to close a dialog and save the current settings and data. Click Cancel to close a dialog and abandon changes.

## Printing Data

You can print the contents of the dialog you are working in.

### To print data:

- 1 Click Print to display a report of the contents of the open dialog.
- 2 Choose Print from the System menu to send the report to a printer.

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

## Printing the Settings Report

If the dialog you are working in contains relatively little information, such as Localize or Attendance Structure, it contains a Print Settings button instead of a Print button. The Print Settings button prints the Settings report.

The Settings Report lists the dialogs included in the report under the Item heading. All of these dialogs are included in the report, no matter which dialog the report is generated from.

### To print the Settings Report:

- 1 Click Print Settings on any dialog with that button.



OR

Choose Settings Report from the Reports menu.

- 2 Choose Print from the System menu to send the report to a printer.

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

## Printing the District Trailing Spaces Report

This is for use by Open District schools only.

Use this report to check for spacing problems which would prevent your Win School database from being integrated into the district database.

The District Trailing Spaces Report lists all School Setup items containing spaces or tabs at the end. Win School, for example, considers “John” and “John ” to be two different items.

Run the report to find items that are potentially duplicates, make any necessary changes in School Setup, then send data to your district.

**To print the District Trailing Spaces Report:**

- 1 From the Reports menu, choose District Trailing Spaces Report.



- 2 From the System menu, choose Print.

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

- 3 Click OK.

For more information, see the Open District User Guide.

### Using the Edit District List button

This is for use by Open District schools only.

The Edit District List button appears in dialogs if the information in the dialog is owned by your district.

Clicking the Edit District List button starts Open District where you can make changes to the list.

For more information about editing items, adding new items, or assigning items for use in your school, see the Open District User Guide.

---

## Establishing a Data Standard

Data standards establish school-wide and district-wide conventions for setting up and entering data. We recommend limiting access to both School Setup and Details to maintain consistency over spelling, abbreviations, capitalization, and terminology.

If your district uses Open District™ or District Data Integrator™ follow district standards for setting up school information. See your District Extract Guide, Open District System Administrator Guide, or contact your district office for more information.

---

## Entering Short Codes and Descriptions

Use short codes to speed data entry. Each unique short code represents descriptive text.

**Short Code:** this column appears in some lists. A chevron (») in a short code (»001) indicates Win School created it. Win School creates short

codes when ASCII Transfer imports data containing a value not already in a popup menu and adds it to the list. You can change the imported code.

A short code must be a unique alphanumeric code of up to 4 characters with no spaces. You can number items sequentially or enter codes defined by your district.

**Description:** enter text as it will appear in the popup menu. This information will appear in other modules.

**Default:** in the column of radio buttons, click the one most frequently used to make it the default. In Details, it will be displayed in the popup menu whenever you create a new course, teacher, or student.

If the field is often not used, or there is no default preference, use N/A as the default. You will need to change the selection only where it is incorrect.

Changing the default selection affects new records only. Old records must be changed manually. You can change old records using Select/Replace/Assign. See “Changing Multiple Records” in the Details Guide.

## Merging List Items

When you have list items with the same meaning but different names, you can merge all names into one throughout the database. For example, merge the city names New York and NY to NY.

### To merge list items:

- 1 Highlight the menu item you want to consolidate.
- 2 Choose Merge List Items from the Edit menu. The left side of the dialog displays the existing list items.
- 3 Double-click the names you want to consolidate.
- 4 The names you select appear in the right side of the dialog, in the Items to Merge list, with radio buttons beside each name.
- 5 Click the radio button next to the name you want to assign to all the list items.
- 6 Click Merge.

## Extended Tab Editor

For information on setting up the Student, Teacher, and Course Custom tabs, see “Naming and Defining Custom Tabs” on page 43.

# Preparing to Set Up a School

---

## Overview

You might not need all of the School Setup dialogs if your school does not use all of the Win School modules. Each dialog is marked required, suggested, or optional, based on the following criteria:

**Required:** Complete if your school uses the indicated module.

**Suggested:** If your school uses the indicated module, you probably need to use the feature, but can choose to ignore it.

**Optional:** Data in this dialog is usually used for reporting. It can be viewed and included in reports, but is not required by any Win School module.

## Preparing for the Next Year

During the school year, you will run Next Year Prep to create the database for the next school year. Next Year Prep is a feature of Utilities and is described in the System Administrator Guide.

In your next year database, you modify the following School Setup dialogs to reflect the coming school year:

<b>Passwords menu</b>	System Passwords. Change passwords at least once a year.
<b>School menu</b>	School Year. Enter the new school year. Transfer Recording. Turn Transfer Recording off while you prepare data for the coming year, then turn it on again when the school year begins.
<b>Scheduler menu</b>	Set Scheduler Terms. Enter new term dates.
<b>Attendance menu</b>	Reporting Terms for Attendance. Enter new term dates. Daily Calendar. Enter holidays and other special days for the coming year.
<b>Student - General menu</b>	Student Age Reporting Date. Calculate student age as of a specific date, instead of the report date.

# Setting Up a School

---

---

## Overview

When you set up for the first time, use the procedures in the order they appear in the Main window.

---

## Passwords Menu

### System Passwords

Required for all schools.

Define User IDs and set password access to all Win School modules in this dialog. Each Win School user must have a unique user ID.

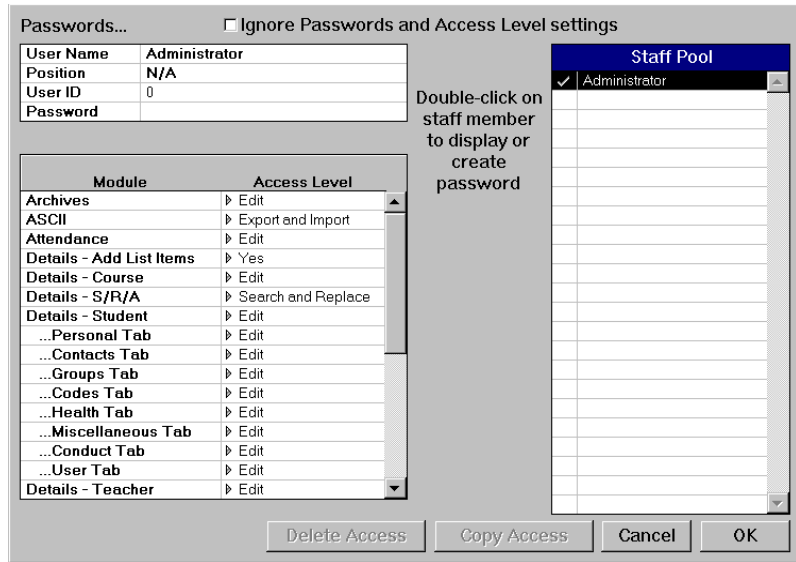
Before you can set up passwords, you must enter all Win School users in Details.

Only the Administrator has access to the Ignore Passwords and Access Levels settings checkbox.

Give at least one user besides the Administrator Edit access to School Setup and Passwords. If the Administrator password is forgotten and no other user has access, no one can access your passwords. You will have to send a copy of your data to Chancery Software to have your passwords deactivated.

#### **To assign passwords:**

- 1 In the Details module, enter all Win School users as teachers, whether they are teachers or not.
- 2 Close Details.
- 3 Start School Setup. In the Main window, click the Passwords menu, then double-click System Passwords.
- 4 In the Staff Pool list, double-click a user name.



- 5 Enter a user ID number of up to 7 digits and a case-sensitive password of up to 7 characters.
- 6 If the user will have mainly one level of access, hold down the Shift key and select that level of access from the popup menu in the Access Level column.
- 7 If necessary, modify access levels to reflect the user's job.
- 8 To assign the same access levels to another user, click their name, then click Copy Access. Repeat for all Win School users.
- 9 When you have set up users, clear the Ignore Passwords and Access Level Settings checkbox, then click OK.

### User Passwords

Users can change their individual passwords after they have been assigned.

#### To change a password:

- 1 In the Win School Shell, choose Change Password from the Shell menu.
- 2 Type the old password and then the new password. Click OK.

### Access Level

The following table describes the different access levels and how they affect Win School users.

The lower scrolling list displays the password access to modules and parts of modules. Popup menus display the level of access selected in the User list. A grayed or dimmed item cannot be selected.

Access Level	User Access
None	Cannot use that module, no access to any tabs and dialogs in Details, or view any details in Query.
View	Can view the data in the module or in Query, and print reports from the module, but cannot change or add data.
Edit	Can view, edit, and print data in that module, and view the data in Query.
Change Only	Can edit any record already entered, but cannot add or delete entire records for students, teachers, or courses.
Export	Can export data using ASCII Transfer with View or Edit access to the module or Details dialog where the information was entered.
Import	Can import data using ASCII Transfer with Edit access to the module or Details dialog where the data will go.
Search Only	Can use Select/Replace/Assign to select items for viewing or reporting.
Search and Replace	Can use Select/Replace/Assign to change or add to data in Details. Can only change or add to the fields with Change Only or Edit access.
Multi-User View	For Scheduler only. User can launch Scheduler in Multi-User mode only and cannot change or add data.
Multi-User Edit	For Scheduler only. User can launch Scheduler in Multi-User mode only and make changes.

## eClass Attendance Passwords

Required for eClass Attendance.

Set up staff members who require access to attendance information. See the eClass Attendance Administration guide for more details.

### To set eClass Attendance passwords:

- 1 Double-click System Passwords from the Passwords menu.
- 2 In the Staff Pool listbox, double-click the name of a staff member.
- 3 From the eClass Attendance popup menu in the Access Level column, choose:
  - None to prevent the user from running eClass Attendance
  - View to let the user view, but not change, eClass Attendance
  - Edit to let the user display and change eClass Attendance
- 4 Repeat for each user, then click OK.


## eClass Grades Password

Optional for eClass Grades.

Define a password for principals, counselors, or other administrators who open eClass Grades files. Do not give this password to teachers; they create their own passwords for their class files.

### To set the eClass Grades password:

- 1 Double-click eClass Grades Password from the Passwords menu in School Setup.
- 2 Type a case-sensitive password of up to 7 characters.
- 3 If the folder used to write Teacher's Classes in Report Cards is not listed, click Browse, locate and highlight the folder, then click OK.



eClass Grades Password...

Password

Write Teachers' Classes Destination  
C:\WINSCHL\TEACHE~1

## Details List Access

Required for Details.

Defines which popup menus in Details can have information added to them.

### To restrict access to your district requirements:

- 1 Double-click Details List Access from the Passwords menu in School Setup.
- 2 Select No for any lists you want to restrict access to in Details, then click OK.

---

## School Menu

### Localize

Required for all modules.

This controls national variations in spelling and vocabulary by giving access to features that appear only for your location.

**To localize your system:**

- 1 In the School Setup Main window, click the School menu, then double-click Localize.
- 2 In the dialog that appears, select your state/country from the popup menu. If your area is not listed, pick the closest match.
- 3 Click OK.

**Student Address Format**

Optional for Details.

Controls student addresses in the Details module. Most schools use the two line address format for students: 2 lines for the address, plus 3 fields for the city, state, and zip code. Always used for teachers and contacts.

Some schools need to separate the elements of student street addresses into 5 fields: street number, street name, address type, direction, and apartment number. City, state, and zip code are extra fields.

If you change the setting after entering student addresses, you will not be able to see those addresses in Details. If you change this dialog back to its original setting, Details will show the addresses in the original format.

**To set up student address format:**

- 1 Double-click Student Address Format in the School menu.
- 2 Select either Two Address Lines or Five Address Fields. Click OK.

**To change from one format to another:**

- 1 Use ASCII Transfer to export student name, number, and the 2 or 5 address fields in your student addresses.
- 2 In a word processor, open the exported file and edit the address information to the new number of address fields.
- 3 In School Setup, change the Student Address Format setting.
- 4 In ASCII Transfer, create a second template in the new format, then import the reformatted student addresses.

**District Names**

Required for District Extract and District Replicator, optional for Details.

District Extract is a component of District Data Integrator (DDI).

The District Extract and District Replicator modules use the District Name and Number you enter here.

**To set up district names:**

- 1 Ask your district for your exact District Name and Number.
- 2 Double-click District Names from the School menu.
- 3 If your District Number appears correctly in the Short Code column and your correct District Name appears in the Description column, click OK.  
Otherwise, manually edit both columns.
- 4 Click a radio button in the right column to make it your default.
- 5 Click OK.

## School Names

Required for District Extract. Optional for Details.

Your database can include rooms, teachers, students from other schools, and the schools that your students and teachers attend.

**To set up school names:**

- 1 Double-click School Names in the School menu.
- 2 The first item in the list is your school name as it is embedded in your software. You can edit the code, but not the name.
- 3 Enter other schools as needed, then click OK.

## School Information

Required for some state reports. Refer to the State or Province Guide for your area to see if you have a report that requires information from this dialog.

Enter basic information about your school and district.

**To set up school information:**

- 1 Enter the Cities, States, Counties, Countries, and Titles for Contacts, and Principal in the Details Lists menu.
- 2 Double-click School Information in the School menu.
- 3 Fill in the Basic Information fields.
- 4 Select Extended Information from the popup menu at the top of the dialog. Enter the Extended Information fields.
- 5 Click OK.

**Basic Information Fields**

Enter basic information about your school and principal. If your school has an alternate name or is known by its initials, type it here.

**Extended Information Fields**

Information in these fields is optional. Enter only what your school or district uses.

**District Number:** Enter your district number.

**District Type:** Public, Private, Independent.

**Organization Number:** Enter one if your school is run by an organization.

**County:** Create the items in this popup menu in the Counties dialog in Details Lists menu.

**Country:** Create the items in this popup menu in the Countries dialog.

**Number of Instructional Days:** For user-defined reports only. Does not affect Attendance calculations.

**Number of Non-Instructional Days:** For user-defined reports only. Does not affect Attendance calculations.

**Free Lunch Eligibility:** Enter Yes or No. For reports or to send to a district office.

**Reduced Lunch Eligibility:** Enter Yes or No. For reports or to send to a district office.

**Contact Information**

Enter basic information about your school's primary contact person.

**School Year**

Required for all schools.

These dates determine the range of dates available in the School Setup and Attendance calendars.

Reset whenever you start working on a new school year.

**Define Grade Levels**

Required for Details.

Indicate which of 25 possible grades are taught at your school and enter the Short and Long Codes which are displayed in other modules.

**To define grade levels:**

- 1 Double-click Define Grade Levels in the School menu.
- 2 In the Usage column, select Full Day or Half Day for the grades taught at your school. Select Not Used for all other grades.
- 3 If necessary, change the Short Code and Long Code of grades. Short codes can be up to 2 characters and must be unique.  
Long Codes can be up to 17 characters.
- 4 Click OK.

## **Transfer Recording**

Suggested for Attendance.

Transfer Recording records every time a student transfers between grade levels, homerooms, tracks, and normal programs. Only use Transfer Recording if you need to because it adds another step anytime you edit student data.

Record transfers between Grade Levels, Homerooms, Tracks, and Normal Programs if:

- You report attendance statistics according to grade or homeroom.
- Your school is a year-round school. Record transfers so all past days of attendance are accessible for students who move from one track to another.
- You have already entered marks into Report Cards. If a student transfers from one class to another, this ensures a record of all classes that might have marks for that student.
- You use Scheduler to record changes to student timetables, and must report class attendance based on period attendance from Attendance.
- In Scheduler, you have changed timetables with the Transfer Date or the Start Date for Change set to a future date.

Do not record transfers if:

- It is early in the school year, and timetables and class rosters are not finalized.
- You need to minimize disk space.

Edit or delete transfers with the Transfer Editor in Details or the Student Timetable window in Scheduler.

If you turn Transfer Recording off, a dialog appears to warn that your transfer file, which contains previous and future transfer history, will be deleted if you proceed. Click Yes to proceed.

If you turn Transfer Recording on, quit School Setup and start Details. A new transfer file is built from current homeroom, normal program, track, and grade assignments.

### **Withdrawal Inactive Day**

Required for Details.

If Win School has been localized for your area, consult your state or provincial documentation.

Change this dialog at the beginning of the year, before you start recording attendance. If you change it during the year, you might have to manually edit attendance.

In Details, when you assign a withdrawal code to a student, you also assign a date. That date will be either the student's last day in school or first day out of school.

### **Year Round School**

Required for year-round schools.

Select Yes if you want to place students, teachers, and courses in tracks, then create separate calendars and schedules for each track. See the System Administrator Guide for more information on year-round schools.

### **Year Round Tracks**

Create and name up to 6 tracks for year-round schools. For non-year-round schools, use these tracks to create up to 6 student, teacher, or course groups. In Win School you can sort students, teachers, and courses by track.

---

## **Details Lists Menu**

Use Details Lists to create the items that appear in popup menus in the Details module.

### **Creating Lists for Popup Menus**

Popup menus speed data entry and ensure consistency in spelling and terminology. Use these popups in other modules to select information instead of typing it.

**To make a popup list:**

- 1 Click the Details Lists menu in the School Setup Main window.
- 2 Double-click Cities. A dialog box opens in which you can add and edit items to appear in popup menus.
- 3 Any items in bold at the top of the list are created by School Setup and cannot be edited or deleted.
- 4 Click OK to save the data.

**To remove an item from a popup menu:**

- 1 Use the Backspace key to erase the Short Code.
- 2 Click OK.

**To change a name or title:**

- 1 Select the old name or title.
- 2 Type the new one.

You can change the name or title of some popup menus for students, courses, and teachers.

**Cities**

Required for Details.

A list of cities for popup menus in School Setup and Details. Use for addresses of students, teachers, and others.

**States**

Required for Details.

A list of states for addresses in popup menus in School Setup and Details. If you localize to Canada, this list is called Provinces. If you localize to United Kingdom, this list is called Counties.

**Counties**

Optional for Details.

A list of counties for popup menus in School Setup and Details. If you localize to United Kingdom, this list is called LEAs, for Local Education Authorities.

### **Countries**

Optional for School Setup and Details.

Most schools just enter a country for the school mailing address. Only districts with schools in more than one country would have more than one entry in this list.

### **Areas**

Optional for Details.

A list of geographical areas in the vicinity of your school for a student popup menu in Details. Students can be sorted by Area.

### **Titles for Contacts and Principal**

Required for Details.

A list of titles, such as Mr., Ms., Dr., and Sister for popup menus in School Setup and Details.

### **Employer Types (for Contacts)**

Optional for Details.

A list of employer types, such as government, military, and retail for popup menus in Details for student contacts.

### **Departments**

Suggested for Scheduler, optional for Details.

A list of school departments, such as History, Industrial Arts, and Business, for popup menus in Course and Teacher Details. Use it if you want to print reports for individual departments or use the Equivalent Full Time report in Scheduler.

### **Address Types**

Optional for Details.

A list of address types, such as Street, Avenue, and Rural Route for an address popup menu. If you do not report by address type, ignore this dialog and ignore the Address Type field in Details.

### **Address Directions**

Optional for Details.

A list of abbreviations such as N, W, SE, and NW for addresses.

**Generations**

Optional for Student Details.

A list of suffixes to identify student lineage such as Jr., Sr., III.

**Publishers**

Optional for Resources Details.

A list of book publishers.

**Resource Types**

Optional for Resources Details.

Type of resource, such as books, tapes, or videos.

**Resource Locations**

Optional for Resources Details.

**Scheduler Menu**

**Set Scheduler Terms**

Required for Report Cards and Scheduler.

Set the number and date ranges of up to 12 terms for the school year. Reset Scheduler Terms after changing the School Year in the School menu.

The length of the shortest class determines the length of Scheduler Terms. Whenever a new class starts, a new Scheduler Term starts. Classes are scheduled into one or more Scheduler Terms.

Set Scheduler Terms...

Term	Start Date	End Date
1	Sep 06, 97	Oct 22, 97
2	Oct 25, 97	Dec 17, 97
3	Jan 04, 98	Mar 12, 98
4	Mar 22, 98	Jun 10, 98

March 1998						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**To add a term:**

- 1 Double-click Set Scheduler Terms in the Scheduler menu.
- 2 If necessary, change the dates to suit your school.
- 3 To add another term, click the last term number and press Enter.

**To delete a term:**

- 1 Highlight any cell within the row.
- 2 Click Delete.

**Timetable Structure**

Required for Attendance, Report Cards, and Scheduler.

The timetable structure created in this dialog is the basis of your schedule. The block timetable appears in the Course Details dialog in Details where you direct Scheduler to place each course in your school timetable.

If you don't use Scheduler but take attendance by period, type the number of periods in your school day and indicate classes that meet on weekends.

**Timetable Structure...**

Fixed days
  Saturday classes  
 Two week timetable
  Sunday classes  
 Relative days

Periods in a Day:   
 Blocks in Schedule:

Prd	Time	Monday (Wk 1)	Tuesday (Wk 1)	Wednesday (Wk 1)	Thursday (Wk 1)	Friday (Wk 1)
1	08:30 - 09:25	▶ A	▶ I	▶ Q	▶ Y	▶ AG
2	09:30 - 10:25	▶ B	▶ J	▶ R	▶ Z	▶ AH
3	10:30 - 11:25	▶ C	▶ K	▶ S	▶ AA	▶ AI
4	11:30 - 12:25	▶ D	▶ L	▶ T	▶ AB	▶ AJ
5	12:30 - 13:25	▶ E	▶ M	▶ U	▶ AC	▶ AK
6	13:30 - 14:25	▶ F	▶ N	▶ V	▶ AD	▶ AL
7	14:30 - 15:25	▶ G	▶ O	▶ W	▶ AE	▶ AM
8	15:30 - 16:25	▶ H	▶ P	▶ X	▶ AF	▶ AN

In this dialog, you establish:

- Number of periods per day to a maximum of 42
- Start and finish times for each period
- Fixed or relative day cycle. For example, in a fixed day cycle, each day of the week is always the same; in a relative day cycle, you can have cycles of other than five days.
- Number of days in your cycle to a maximum of 14
- Number of blocks in your cycle to a maximum of 304
- Arrangement of blocks. A block is a group of classes that meet at the same time.

### **Creating a Timetable for Scheduler**

Periods cannot overlap. If a period has the same start and end time, Scheduler will not include that period in student timetable reports in matrix format.

#### **To create a timetable for Scheduler:**

- 1 Double-click Timetable Structure in the Scheduler menu.
- 2 Select Fixed Days if you are on a one or two week fixed cycle.  
Select Two Week Timetable if you are on a two week fixed cycle.  
Select Relative Days if you are on a relative cycle, then select the number of days in your cycle from the popup menu.  
Select Saturday or Sunday classes if applicable.
- 3 Select the number of Periods in a Day from the popup menu.
- 4 Select the number of Blocks in Schedule.
- 5 Assign block letters to the periods of each day.
- 6 Click in the Time field to type start and finish times for each period.  
Use the 24-hour clock where one o'clock in the afternoon is 13:00.
- 7 Click OK.

### **Creating a Timetable for Attendance without Scheduler**

#### **To create a timetable for Attendance without Scheduler:**

- 1 Double-click Timetable Structure in the Scheduler menu.
- 2 Select Fixed Days in the Timetable Structure dialog.
- 3 Select the number of Periods in a Day from the popup menu, then click OK.  
  
Ignore Period start and Finish times in the Time column. Ignore lunch hour as a period unless you take attendance for lunch hour.

## **Teacher Course Load**

Suggested for Scheduler.

Set this after you set up your Timetable Structure dialog, and before you use the Scheduler module.

Before you schedule teachers, you must determine how many blocks teachers can teach in a Scheduler term, and how many blocks in a row they can teach in a school day. You may have to consult teacher contracts or district mandates for this information.

In the Details module, you can reduce the default number for teachers with a smaller teaching load.

In the Scheduler module, you can reserve specific blocks in which a teacher cannot be scheduled, and you can manually override teacher course load.

**To set Teacher Course Load:**

- 1 Double-click Teacher Course Load in the Scheduler menu.
- 2 Type the number of blocks a teacher can teach, and the maximum number of consecutive blocks a teacher can teach, then click OK.

## Reservation Labels

Optional for Scheduler.

Reservation Labels reserve blocks in the timetables of teachers, rooms, and students, so the Scheduler module will not automatically schedule anything during those times. You can add or change reservation labels at any time.

The label Free has specific meanings in Win School. You can change the names of labels, but do not change their meanings. Scheduler labels all unscheduled blocks as Free. Classes can be scheduled over that label, but Scheduler will not schedule classes into a block that has a Reservation Label.

**To create Reservation Labels:**

- 1 Double-click Reservation Labels in the Scheduler menu.
- 2 Type a list of labels to reserve blocks in timetables. For example, Meeting, Hall Duty, Counseling, or Part-time, then click OK.

## Period Labels and Block Labels

Optional for Scheduler.

Use Period Labels and Block Labels if you have a complicated timetable, for example, where each class is more than a period long.

You have to set up both Period and Block Labels even if you use only one.

Timetables in the Scheduler module can use the consecutive period numbering system and block letters. Or you can create and use alternative labels.

To print timetables in the Scheduler module, select Use Block and Period Labels in the Print Options dialog.

**To create Period and Block Labels:**

- 1 Double-click Period Labels in the Scheduler menu.
- 2 Type up to 11 characters next to each period, then click OK.
- 3 Double-click Block Labels in the Scheduler menu.

- 4 Type up to 9 characters next to each Short Label. Use numbers, text, or both.
- 5 Click OK.

## Scheduling Drop Date

Optional for Scheduler.

If you have a deadline for student transfers, or want to avoid inadvertent changes to student schedules, use this feature to have Scheduler alert you before you change a student timetable after the term has started.

As changes are expected in the first few days of a term, set the number of school days you want to pass before your changes produce alerts. Changes to timetables for terms that haven't yet started will not produce alerts.

### To set a scheduling drop date:

- 1 Double-click Scheduling Drop Date in the Scheduler menu.
- 2 Type the number of school days to pass before alerts appear. Click OK.

## Scheduling Aide Types

Optional for Scheduler.

If your school schedules teacher's aides, list the different types here for course and teacher popup menus in the Details module.

### To list aide types:

- 1 Double-click Scheduling Aide Types in the Scheduler menu.
- 2 Type your list of aides, for example, Special Education, Primary Grades, or English as a Second Language. Click OK.

---

## Report Cards Menu

### Report Card Bins

Required for Report Cards.

In Report Cards, bins are where you type a set of student marks for each student's classes. Name up to 30 Report Card bins here. For example, first quarter, second quarter, first semester, final, or final mark.

**To add a new report card bin at any time:**

- 1 Double-click Report Card Bins in the Report Cards menu.
- 2 Name the bins you will use.
- 3 Select Yes from the Bin In Use popup menu to activate it.

If you select No from the Bin In Use popup menu, the corresponding bin will not appear in Report Cards.

If that bin contains marks, the marks will not be lost. To retrieve the marks, select Yes from its Bin In Use popup menu.

- 4 Click OK.

**Edit Points & Credits Table**

Required for Report Cards.

Create up to 15 points and credits tables. The Report Cards module uses these tables to calculate letter grades, percentages, grade points, and earned credits from the letter grade or percentage marks you type.

To determine how many points and credits tables you need, consider the marking schemes of your classes. Different departments or programs might use different marking schemes and will need separate tables.

Each Points & Credits table contains 2 lists of marks: Normal Courses and Honors Courses. Honors courses are not related to an honor roll. They are for students who do more demanding work in a class and are graded on a different scale.

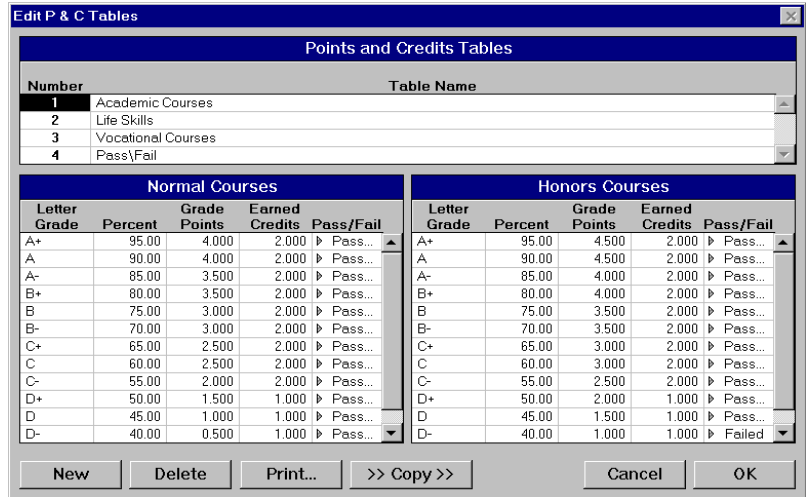
Select Is Honors in the Report Cards module to indicate that a student is doing honors work.

You can select a default Points & Credits table for each course in the Details module, and you can change that default table in the Report Cards module.

If you edit a Points & Credits table after entering marks, use Recalc Bins in Report Cards to recalculate marks according to the new table.

**To create a Points & Credits Table:**

- 1 Double-click Edit Points & Credits in the Report Cards menu. The upper scrolling list contains the names of up to 15 Points & Credits tables.



- 2 To view a table in the lower part of the dialog, click it in the upper list of tables.
  - To add a new table, click New, then type the name of the table.
  - To remove a table, click it in the upper list, then click Delete.
  - If the settings in the Normal and Honors lists are similar, click Copy to copy data from the Normal list to the Honors list.
  - To print a table, click it in the upper list, then click Print.
- 3 Enter letter grades in the Normal Courses and Honors Courses tables, then enter the lowest percentage that will earn that letter grade.
  - If a mark between 85% and 94.9% earns a B, enter 85.0 as the percentage required for a B, and 95.0 as the percentage required for an A.
  - One letter grade must have a minimum percentage of 0.0. If some letter grades do not have percentages, add them to the end of the list.
- 4 If applicable, enter the grade points and earned credits corresponding to each letter grade.
- 5 Choose the pass/fail status in the Pass/Fail column, then click OK. By default, each letter grade is set to N/A.

---

## Attendance Menu

### Attendance Structure

Required for Attendance.

Daily attendance is always recorded, but you can choose to record period attendance.

If you do not keep period or twice-daily attendance, select daily only, so that the Attendance module can ignore period information, run more quickly, and keep files smaller.

If you have only kept daily attendance, you can start recording period attendance at any time.

#### To set attendance structure:

- 1 Double-click Attendance Structure from the Attendance menu.
- 2 Select either daily only or by period or twice-daily as well as daily, then click OK.

### Daily and Period Attendance Codes

Daily Attendance Codes are required for Attendance.

Period Attendance Codes are optional for Attendance.

Enter up to 128 daily and period attendance codes. In the Attendance module, you can manually record attendance, or you can scan attendance in by class using the Scanning module.

School Setup automatically creates 4 codes: Off Track, Suspended, Not Enrolled, and Present. The Off Track code is assigned by year-round schools to students whose tracks are on holiday. You cannot change these long or short codes, but you can edit their attendance values and excused/unexcused status.

You can add a code after you have started recording attendance. Your existing data will not be affected. The code becomes available in the Attendance module, and can be assigned to past or future days.

If you change or delete a code, any student who had that code will have Unknown Code recorded for the day. You will have to manually replace all the Unknown codes with valid codes.

**To add or edit attendance codes:**

- 1 In the Attendance menu, double-click Daily Attendance Codes or Period Attendance Codes
- 2 Set the values for the 4 existing codes.

Long Code	Short Code	Present	Absent	Late	Unexcused	eClass Att	Default Absent	Default Tardy
Off Track	Off Track	0.000	0.000	0.000	<input type="checkbox"/>	<input type="checkbox"/>		
Suspended	Suspend	0.000	0.000	0.000	<input type="checkbox"/>	<input type="checkbox"/>		
Not Enrolled	N/A	0.000	0.000	0.000	<input type="checkbox"/>	<input type="checkbox"/>		
Present	Pr	1.000	0.000	0.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Absent/Present	AP	0.500	0.500	0.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✓	
Present/Absent	PA	0.500	0.500	0.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Tardy	T	1.000	0.000	1.000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Tardy Excused	TE	1.000	0.000	1.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>		✓
Professional Day	PD	0.000	0.000	0.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Field Trip	F	1.000	0.000	0.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Print... Cancel OK

- 3 To add a field, press Enter with your cursor in the last Long Code or Short Code field.
- 4 Enter a Long and Short Code, set its values, and if it's unexcused, select the Unexcused checkbox.
- 5 If you use eClass Attendance, you must set up default absent and default tardy codes.
  - In the Default Absent column, check one code with an absent value greater than zero.
  - In the Default Tardy column, check one code with a tardy value greater than zero and an absent value equal of zero.
- 6 In the eClass Attendance column, select the Attendance codes available to eClass Attendance.

Leave the first 3 rows clear to limit the entry of Off Track, Suspended, and Not Enrolled attendance codes to the main office.

For more information on eClass Attendance, refer to the eClass Attendance Administration guide or Quick Reference card.

**Attendance Codes and Values**

**Daily Attendance Codes:** Each code has a 21 character long form and an 11 character short form.

**Period Attendance Codes:** Each code has a 15 character long form, and a 1 character short form.

Give the short code a unique first letter, because the Monthly Homeroom Register in the Attendance module prints only one letter of the short code.

**Attendance Values:** Each code has Present, Absent, and Late attendance values. For a daily code, the total of the Present and Absent values normally is 1.000, meaning a whole day.

For period attendance, the total of the Present and Absent columns for 1 code should be 1.000, meaning a whole period. You can enter fractions for Present and Absent values for 1 period code totaling up to 2.000, if your school attendance accounting requires it.

**Late values:** These values are independent of Present and Absent values. Late values are whole numbers that count the number of times during the day a student was late. Win School allows Present, Absent, and Late values of up to 2.000 each, to allow for some special reporting requirements.

**Unexcused:** Select the checkbox of attendance codes that are unexcused.

**Default Absent** and **Default Tardy:** Check the code for default absent and default tardy. You can set a default code by clicking in the Default Absent and Default Tardy columns. A check mark appears.

## Reporting Terms For Attendance

Required for Attendance.

If you create report templates in Report Manager that contain Calculated Attendance smart items, define the date ranges these templates will use. You can have up to 12 Attendance reporting terms.

Whenever you start working on a new school year, change attendance reporting terms to reflect the new dates.

Usually, schools use the same date ranges for both Reporting Terms for Attendance and for Scheduler Terms. See “Set Scheduler Terms” on page 19.

### To set reporting terms:

- 1 Double-click Reporting Terms for Attendance in the Attendance menu.
- 2 Type the Start and End dates for the first term.
- 3 To add another term, click the last term number and press Enter.  
To delete a term, highlight any cell within the row, then click Delete.
- 4 Click OK.

## Define Day Types

Required for Attendance.

Day types include full day, half day, ADA, and no attendance. Win School has Normal and Holiday for all schools. Off-Track days are for year-round schools to identify the terms that each track is on vacation.

When you create other day types, assign them in the Daily Calendar dialog of the Attendance menu.

You can add Day Types, and change their definition after the school year starts. Changes to Code, Description, and Value are made wherever that Day Type has been assigned. If those days already have attendance, values for those days are modified accordingly.

**To define day types:**

- 1 Double-click Define Day Types in the Attendance menu.
- 2 To enter a new day type, click in the last line, then press Enter.
- 3 Type a unique, single-character alphanumeric code.
- 4 Type a description of up to 21 alphanumeric characters in the Description field.
- 5 Select the Value for that day type from the popup menu.
- 6 Press Enter to move to the next day type, then click OK.

**Day Type Symbols and Codes Defined**






**Code:** This is a unique, single character, it is used in reports that do not have room for the full description. The code for a Normal day is blank.

**Description:** Descriptions can be up to 21 alphanumeric characters.

**Value:** Values affect only daily codes: 1.0 for a full day, 0.5 for a half day, 0.0 for a holiday. Attendance cannot be recorded for a 0.0 day.

**ADA:** This stands for Average Daily Attendance, non-instructional days. An ADA day has the same attendance data as either the previous or next school day, whichever has the higher total attendance.

**Symbols:** These are not editable. When you change a Day Type Value the corresponding symbol changes.

	Plain	1.0
	Triangle	0.5
	Dimmed	0.0
	Slash	ADA
	Cross	Off Track

**Daily Calendar**

Required for Attendance.

Initially, all days are assigned the Normal Day Type, which means every school day is considered a teaching day. Using the Daily Calendar, you

assign Day Types to holidays and non-teaching days. If your timetable is on a relative cycle, assign relative days here.

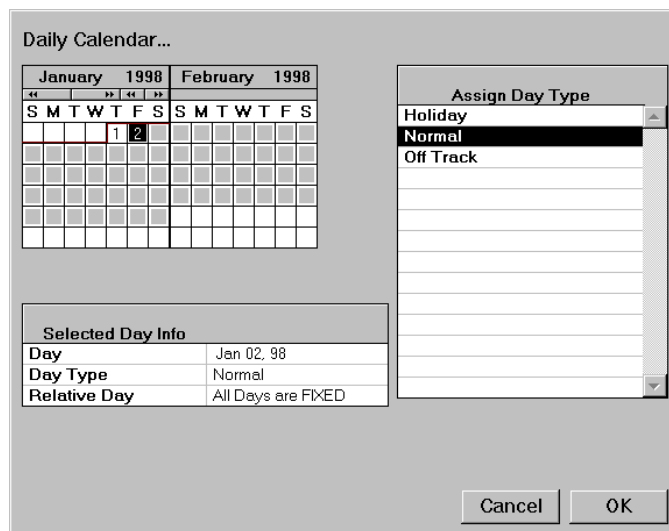
Complete this calendar before the start of each school year. The dates displayed in the Daily Calendar are determined by what you entered in the Reporting Terms for Attendance dialog.

You can change Day Types and relative day assignments at any time. Some day types, such as snow days, cannot be assigned until they happen. If you change a Day Type after attendance has been entered for that day, the values for that day are modified.

Copying the School Calendar replaces the Day Types in the track calendar with those in the School Calendar. Do this once, at the beginning of the year. Later, you can make changes manually to each track calendar.

#### To assign Day Types:

- 1 Double-click Daily Calendar in the Attendance menu.
- 2 On the Calendar, use the month and year VCR buttons to locate a day to which you want to assign a Day Type.
- 3 Click that day to highlight it. Control-click other days in the Calendar that you want to assign the same Day Type.
- 4 Double-click that Day Type.
- 5 Repeat this procedure for all Day Types and each month in your school year.
- 6 If your school has a Relative Day timetable, assign relative days by highlighting a day in the Calendar, and, in the Assign Relative Day bar, click its relative day number, then Auto.
- 7 Click OK.










**To assign Day Types in a Year Round school:**

- 1 Use the previous procedure to set your relative days and holidays.
- 2 Choose one of your tracks from the Track popup menu.
- 3 Click Copy School Calendar to copy all day type assignments in the School Calendar into the selected track calendar.
- 4 Assign the Off-Track day type for the days that track is on vacation. Assign any professional days or other holidays that apply to that track.
- 5 Repeat for all tracks, then click OK.

**Calendar Icons**

A calendar covers the school year selected in the School Year dialog of the School menu, and it shows the dates you set in the Reporting Terms for Attendance dialog. Use the VCR buttons to find different months and years.

The attendance values are:

	Plain	1.0
	Triangle	0.5
	Dimmed	0.0
	Slash	Average Daily Attendance (ADA)
	Cross	Off Track
	Gray	Outside Term Dates
	Dot in Upper Left	Relative Day Assigned
	Solid Line between days	Term Transition

The same codes are used in the Calendar in the Attendance module.

By default, school days are the Normal Day type. Weekends are dimmed unless your school meets Saturdays or Sundays.

---

## Rooms Menu

### Room Types

Required for Scheduler.

Create room types such as Classroom, Gymnasium, Workshop, Language Lab, and Science Lab. The Scheduler module can schedule classes into rooms based on their assigned room types.

**To enter a new room type:**

- 1 Double-click Room Types in the Rooms menu.
- 2 Put your cursor at the end of the name of the last room type listed and press Enter.
- 3 Enter a name or names, then click OK. If you use Resource mapping in the Scheduler module, create a Res. Map room type.

**Room Setup**

Required for Attendance and Scheduler.

The rooms you set up in this dialog are used throughout Win School as homerooms or other standard rooms for teachers and students. The Create Timetable menu in the Scheduler module uses room type preferences when scheduling rooms.

**To set up rooms:**

- 1 Double-click Room Setup in the Rooms menu. Rooms are sorted alphabetically and numerically by room number.
- 2 To add a room, click the last room in the list and press Enter. A new line is added to the end of the list.
- 3 Type that room's information in each column.
- 4 To change the titles for the Homeroom Number, User Def 1, or User Def 2 columns, click Edit Titles, type the new titles, then click OK.
- 5 To delete a room, delete its room number.
- 6 Click OK.

**Room Setup Columns**

**School ID:** Your school is selected by default. School names and IDs are created in the School Names dialog of the School menu.

**Room Number:** Enter up to 7 unique alphanumeric characters.

**Homeroom Number:** Type up to 7 alphanumeric characters. If you leave this column blank, Win School copies the room number as the homeroom number when you click OK.

**Phone Number:** This is optional.

**Capacity or Size:** Select the Capacity or Size of the room to be used in the Scheduler module.

**Room Title:** This is optional.

**Type:** Used by Scheduler. Create these in the Room Types dialog of the Rooms menu. In the Details module, give courses and teachers preferences

for specific rooms and room types.

Assign clone rooms a Res. Map room type for resource mapping.

**For Scheduler:** Indicate here whether or not the room will appear in the Scheduler module.

**Use as Homeroom:** Select No for rooms used only for Resource Mapping in the Scheduler module, or to remove unnecessary rooms from Homeroom popup menus in other modules.

**User Def 1 and User Def 2:** This is optional. Enter up to 15 characters. Select with the VCR buttons to define special rooms. For example, Story or Wheel Chair Acc.

## Room Clone

Optional for Scheduler.

To schedule more than one class in the same room at the same time, you must create cloned rooms.

**To create room identities for resource mapping in the Scheduler module:**

- 1 Double-click Room Clone in the Rooms menu.
- 2 In the top portion of the dialog, double-click the room you want to clone.
- 3 In the lower portion, you will see the room capacity, type, and room number.
- 4 Type the cloned room number in the Room Number field in the lower portion. For example, to create a clone of Room 100, number it 100A.
- 5 Change the cloned room capacity if necessary.
- 6 Change the room type to Res. Map Room. The Clone of field gives the actual room number which cannot be changed.

---

## User Defined Fields, Flags, Codes, and Lists

Optional for Details.

Create user-defined fields, flags, codes, and lists to track data for courses, teachers, and students that cannot be tracked in existing fields in the Details module.

User-defined items are commonly required for State/Province reports.

User-defined fields and flags are special data slots in Details. You type text, numbers, or dates in a field, such as phone numbers or the date of an exam. You select yes or no for a flag. Items like whether a teacher teaches summer school, or whether a student has a job are examples of flags.

Text Field for courses and teachers can have up to 15 characters. For students, Fields 1 to 26 can have up to 15 characters, and fields 27 to 32 can have up to 49 characters. Text fields cannot be changed later to another type without loss of data.

Codes and lists appear as a popup menu in Details. You can use codes and lists to track student status in school defined programs or to track the progress of at-risk students.

**To create user-defined fields or flags:**

- 1 Double-click User Defined Fields and Flags in the Courses or Teachers menu.

OR

In the Student - User Defined menu, double-click User Defined Fields or User Defined Flags.

- 2 To create a field, highlight a field name and type a title for it.
- 3 Select a type for the field from the popup menu. Date, Numeric, and Phone types have restricted formats, but can be changed to text.
- 4 If you are creating a student field, click the padlock to lock or unlock the field. A lock field means you cannot change its contents.
- 5 To create a flag, highlight the default flag name and type a title for it.
- 6 Click OK.

**To create user-defined codes:**

- 1 Double-click User Defined Codes in the Courses, Teachers, or Student - User Defined menu.
- 2 To change the title of a code, choose the title, click Edit Title, then type a new name, and click OK.
- 3 To add a code, click the Short Code or Description field in the line below the last item, then type a new Code and Description.
- 4 Click OK.

**To create user-defined lists:**

- 1 In the Courses, Teachers, or Student - User Defined menu, double-click User Defined Lists.
- 2 To change the title of a list, choose the title, click Edit Title, then type a new name, and click OK.
- 3 To add a list item, click the Description field in the line below the last item, then type a new Description.
- 4 Click OK.

---

## Courses Menu

### Course Numbers

Required for Scheduler.

If you scan student course requests, required for Scanning.

Determine the format course numbers must have. If a course number does not meet the criteria you set up in this dialog, you cannot save that course when you enter it in the Details module.

**To change course numbers:**

1 Double-click Course Numbers in the Courses menu.

2 If you scan student requests, select Unique and Numeric.

If you scan alphanumeric course requests, select Unique and Alphanumeric. You can only use the CSL-897 (Using COL) scan form for alphanumeric course requests.

Select Non-unique if course numbers can be duplicated.

Select Alphanumeric if course identifiers can include letters and numbers.

3 Click OK.

### Course Types

Optional for Details.

Classify courses by type. For example, Special Education, English as a Second Language, Apprenticeship, or College Prep. You can also classify courses by the type of work: Academic, Project, or Lab.

### Course Subject Areas

Optional for Scheduler.

Create a list of cross-departmental subject areas for course popup menus in the Details module. Identify special course subject areas such as Renaissance Studies or Community Involvement.

**To create a course subject areas list:**

1 Double-click Course Subject Areas in the Courses menu.

2 Type a code in the Short Code column, and the names of course subject areas in the Description column.

- 3 Choose a default by clicking the radio button in the right column.
- 4 Click OK.

---

## Teachers Menu

### Teacher Position

Optional for Details.

Create a list of staff position titles. Principal and N/A are defined by Win School. All Win School users must be defined in order to have password access. Type positions such as Clerk, Librarian, and Nurse in this dialog.

**To create a teacher position list:**

- 1 Double-click Teacher Position in the Teachers menu.
- 2 Type the position description.
- 3 Choose a default by clicking the radio button in the right column.
- 4 Click OK.

---

## Student - General Menu

### Student Numbers

Suggested for Details.

Required for Scheduler and Details if you scan course requests.

Make student numbers alphabetic, alphanumeric, or numeric, so the Details module can auto-increment them with new student records. Whenever you add a student, Details enters the next unused number higher than the last one.

You can change the format of student numbers without altering those already entered. The new format applies only to numbers as they are added and edited.

**To define student numbers:**

- 1 Double-click Student Numbers in the Student - General menu.
- 2 Choose the Numeric, Alphanumeric, or Alphabetic radio button.

- 3 Click OK.

## Normal and Special Programs

Normal Programs are suggested for Scheduler, optional for Details.

Special Programs are optional for Details and Scheduler.

Normal programs are the standard programs in your school and the number of credits required to pass. Normal programs usually have required courses. Most elementary and middle schools have one normal program. At the secondary level they are often titled Academic, Vocational, or Honors.

Most students enter a program when they enter the school, and progress through that program to graduation.

The Scheduler module uses programs to give priority to required courses and to generate requests.

### To create programs:

- 1 Double-click Normal Programs or Special Programs in the Student - General menu.
- 2 Type the name of a program in the first Program Name field.
- 3 Press Enter to move to the next program or to add a program to the end of the list.
- 4 In each grade-level column, enter the number of credits required to pass that next grade. If a program does not apply to a grade level taught in your school, leave that cell blank.
- 5 Scroll between grades using the horizontal scroll bar. Grades that have been identified as Not Used in the Define Grade Levels dialog are shaded.
- 6 To delete a program, delete its name.

Any students who had been in that program will be given the first program, alphabetically.

Any students in a special program are left without a special program.

If you change the program name, all the students who were in the program under the old name will remain in the renamed program.

## Student Groups

Optional for Details.

Record student membership in clubs, bands, teams, committees, special learning groups, and classes.

Add groups as they develop in your school. Do not delete groups if you need records of their past membership.

## Ethnic Categories

Optional for Details.

Use to classify students and teachers. The default title is Ethnic Categories, but you can rename it for other purposes. To do this, highlight the title text at the top of the dialog and replace it by typing another name.

## Home Languages

Optional for Details.

To use this list for another purpose, highlight the title text at the top of the dialog and replace it.

## Lunch Status

Optional for Details.

For example, type Free, Half Price, Full Price, Salt Free, Vegetarian. To use this list for another purpose, highlight the title text at the top of the dialog and replace it.

## Contact Relationship

Optional for Details.

Identifies the relationship between the student or teacher, and 1 of 6 possible contacts, such as parent, spouse, sibling, neighbor, friend, or grandparent.

## Transportation

Optional for Details.

Define up to 6 fields for transportation information in the Misc. tab in Student Details.

### To define transportation information:

- 1 Double-click Transportation in the Student - General menu.
- 2 To create a field, replace Field Name with a name of up to 15 characters.
- 3 Choose a Type from the popup menu, then click OK.

Date, Numeric, or Phone types have restricted formats, but can be changed later to Text.

Do not leave fields empty. If you are not going to use all of the fields, leave them with the default or some other title.

## Student Age Reporting Date

Required for Details. Optional for Attendance.

Specify whether student age calculations should be made as of the current date, or on a particular date.

Some Attendance reports group students by age.

Update this field each school year.

### To set the student age reporting date:

- 1 Double-click Student Age Reporting Date in the Student - General menu.
- 2 Choose the “As of Report Date” radio button or choose the “As of” radio button and type a date, then click OK.

---

## Student - Codes/Actions Menu

### Entering Codes

You use the same procedure to set up Status and Conduct Codes and Conduct Action.

#### To enter a new code:

- 1 In the Student - Codes/Actions menu, double-click one of the options.
- 2 Put your cursor in the code or text of the last code and press Enter.
- 3 Type the Code or Short Code and Description.
- 4 If you are entering Status Codes, choose the type of code from the popup menu.
- 5 Select the default code or action, then click OK.

#### Status Codes

Required for Details.

Status codes are used as entry and withdrawal codes. Enrolled, Left, and Returned cannot be edited.

#### Conduct Codes

Required for the Student Details Conduct tab.

Complete this dialog if you wish to record student conduct such as Volunteering, Vandalism, or Bravery.

### Conduct Action

Required for the Student Details Conduct tab.

To record student conduct in the Details module, such as Detention, Commendation, or Letter to Parents.

---

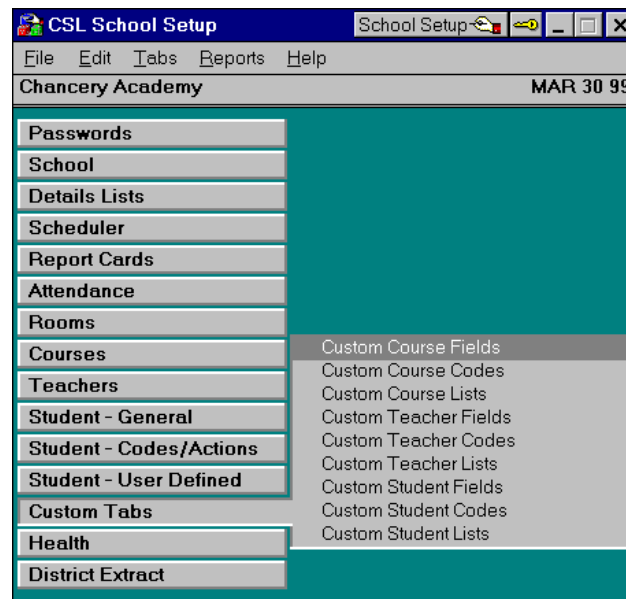
## Custom Tabs Menu

Optional for Details.

Use these menu items to create customized fields, lists, and codes in addition to those you already defined in other User Defined menus.

The data defined in the Custom Tabs menu is used in custom reports.

You can define up to 200 fields, 100 lists, and 50 codes that you can use in up to 10 tabs each for students, teachers, and courses.



### Defining Custom Tab Items

Custom tabs appear in their own row in Details. Custom tab fields, lists, and codes appear in the Custom tabs you define. You enter text, numbers, or dates in a field, and if you define its type as Boolean, the field accepts Yes, No, or N/A. Codes and lists appear as a popup menu in Details.

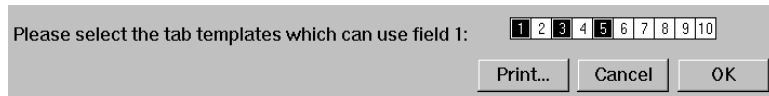
You can use codes to track student status in programs. You can attach a date to a code and have a series or history of them, like the Conduct tab in Student Details.

After defining Custom tab items, use the Custom Tab Designer from the Tabs menu to place Custom tab items into Custom tabs.

Assign access to Custom tabs using System Passwords from the Passwords menu.

**To create Custom fields:**

- 1 Double-click Custom Course Fields, Custom Teacher Fields, or Custom Student Fields in the Custom Tabs menu.
- 2 In the Field Name column, type a name of up to 29 characters.
- 3 Choose a type from the popup menu in the Type column: text, numeric, date, phone number or Boolean. If the type is Numeric, type the number of decimals the field can have, to a maximum of 3.
- 4 Select the tab(s) which can use the field in Details, then click OK.



**To create Custom codes:**

- 1 In the Custom Tabs menu, double-click Custom Course Codes, Custom Teacher Codes, or Custom Student Codes.
- 2 To change the title of a code, choose the code from the popup menu, click Edit Title and type a new name, then click OK.
- 3 To add a code, click the Short Code or Description field in the line below the last item, then type a new Code and Description.
- 4 Select a code to be the default.
- 5 Select the tab templates which can use each code, then click OK.

**To create Custom lists:**

- 1 In the Custom Tabs menu, double-click Custom Course Lists, Custom Teacher Lists, or Custom Student Lists.
- 2 To change the title of a list, choose the list from the popup menu, click Edit Title and type a new name, then click OK.
- 3 To add a list item, click the Short Code or Description field in the line below the last item, then type a new Code and Description.
- 4 Select a list item to be the default.
- 5 Select the tab templates that can use each list item, then click OK.

Use Custom Tab Designer from the Tabs menu to create and define the tabs that appear in the Details module. For more information, see “Naming and Defining Custom Tabs” on page 43.

---

## Health Menu

This menu is for future use with the Health module.

---

## District Extract Menu

### District Extract Setup

Required for schools in districts that use CSL District Data Integrator (DDI).

- Set up where your school's District Extract files get copied, how they get transferred to the district, where your school's copy of these files gets stored, and your School Identifier.
- When you create District Extract files, 2 copies are generated: 1 which you transfer to the district and 1 for your own records.
- Your School Identifier is a 7-character name for your school's District Extract files. Contact your district for your School Identifier.

**To set up your District Extract information:**

- 1 Double-click District Extract Setup in the District Extract menu.
- 2 Click the Browse button in the top section, then locate and open a folder for District Extract files, and click OK.
- 3 In the Destination Folder After Compression section, select the appropriate radio button:
  - If you use a modem or any portable media other than diskettes, select the In the school folder.
  - If you use diskettes, select In the school folder and segmented onto diskette.
  - If you use a WAN, click Browse and open the directory folder for your files. Select In the school folder and copied to this district folder, via wide area network.
- 4 Enter your School Identifier, then click OK.

### Bins for District Use

This is where you set up the bin information that gets included in your District Extract files. To minimize transfer time, choose Yes only for the bins your district requires at different times of the year.

**To set up your bins:**

- 1 Double-click Bins for District Use in the District Extract menu.
- 2 Choose Yes for the bins you want included in the District Extract files, then click OK. Press Control and choose Yes to include all bins.

---

## District Replication Menu

### Bins for District Use

This is where you set up the bin information that gets included in your District Replicator files. To minimize replication time, choose Yes only for the bins your district requires at different times of the year.

**To set up your bins:**

- 1 Double-click Bins for District Use in the District Replication menu.
- 2 Choose Yes for the bins you want included in the District Replicator files, then click OK. Press Control and choose Yes to include all bins.

---

## Tabs Menu

The Custom tab items you name and define using the Custom Tabs menu appear on tabs in Details.

The Multi-Data tab items you define appear in the Multi-Data tab in Details.

You must assign access levels to Custom and Multi-Data tabs. The default access level for both Custom and Multi-Data tabs is None for all users other than the Administrator. Use the Passwords menu to specify who can access which Custom and Multi-Data tabs.



### Naming and Defining Custom Tabs

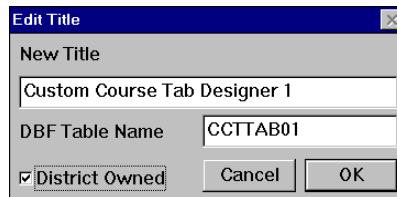
For a Custom tab to appear in the Details module, you must define the fields, codes, and list items it contains. You must also name these tabs.

**To define Custom Tabs:**

- 1 From the Tabs menu, choose Custom Tab Designer, then choose Courses, Teachers, or Students.



- 2 From the popup menu at the top of the dialog, choose the tab you want to define.
- 3 Click Edit Title and type a title for the tab. Click OK.
- 4 To include it in a District Extract export for District Data Integrator (DDI), select District Owned, then click OK.



- 5 For each field you want on the tab, choose a field or list from the Type popup menu.  
After you have put a field or list on a tab, it is dimmed and cannot be used again on the same tab.
- 6 If an item does not appear in the popup menu, you did not select this template as one that can use the item. See “Defining Custom Tab Items” on page 40 for more information.
- 7 At the bottom of the dialog, select each code you want on the tab.
- 8 If one of the codes you created does not appear in this dialog, you did not select the current tab as one it could use when you created the code. See “Defining Custom Tab Items” on page 40 for more information.
- 9 Click OK.

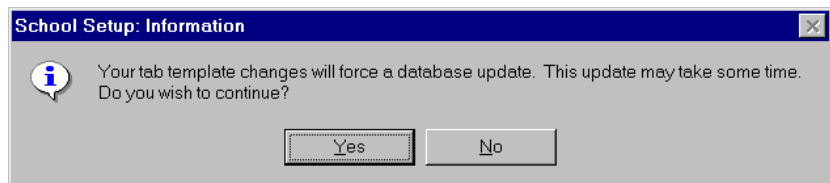
**Using Multi-Data Tab Designer**

Use the Multi-Data Tab Designer to define the Multi-Data tabs used in the Details module. These items must be defined here or the Multi-Data tab will not appear in Details.

You can define up to 2 titles or headings each for Teachers and Courses, and up to 5 titles or headings for Students.

**To define Multi-Data tabs:**

- 1 From the Tabs menu, choose Multi-Data Tab Designer, then choose Courses, Teachers, or Students.
- 2 From the popup menu at the top of the dialog, choose the tab you want to define.
- 3 Click Edit Title and type a title for the tab. Click OK.
- 4 To include it in a District Extract export for District Data Integrator (DDI), select District Owned, then click OK.
- 5 Click Add Item to define a field, then type a name of up to 50 characters in the Field Name column.
- 6 From the popup menu in the Type column, choose text, numeric, date, phone, Boolean, or list.  
  
If the type is Text, type the length of the field, up to a maximum of 100 characters. The default is 29.  
  
If the type is Numeric, type the number of decimal places, up to a maximum of 3.  
  
If the type is List, choose the custom list name from the List popup menu.
- 7 To delete a field, highlight it and click Delete Item.
- 8 To insert a field, click the line before where you want the field, then click Add Item.  
  
You can select up to 5 fields for the Summary.
- 9 In the Summary column, select the fields to appear on the Multi-Data tabs, Summary view, in Details.
- 10 Click OK, then click Yes to save your changes and update your database.



## Exporting Tab Templates

You can export both Custom and Multi-Data tab templates from districts to schools, or from one school to another.

You can export any number of Custom and Multi-Data tab templates for Courses, Teachers, and Students.

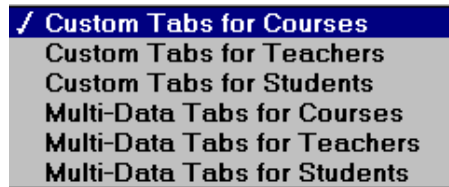
The tab numbers you export will be imported into the same numbers during the import, for example, if you export Custom Course tab numbers 2, 4, and 6, the text file will be imported into Custom Course tabs 2, 4, and 6.

**To export tab templates:**

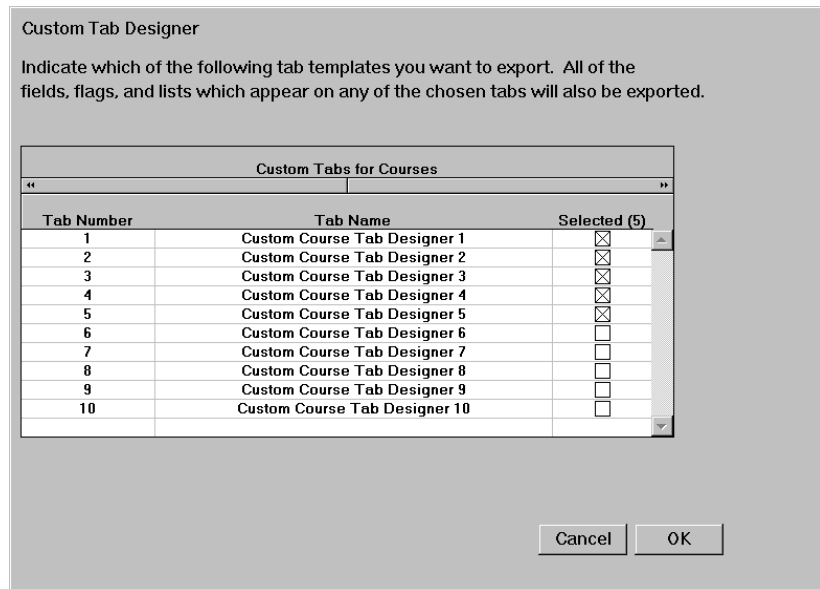
- 1 From the File menu, choose Export Tab Definitions.
- 2 Click the VCR buttons to toggle through the lists of tab types.

OR

Choose a tab template from the popup menu.



- 3 In the Selected column, select the tabs you want to export, then click OK.



- 4 Indicate the name and location of the output file, then click OK.

**Importing Custom and Multi-Data Tab Definitions**

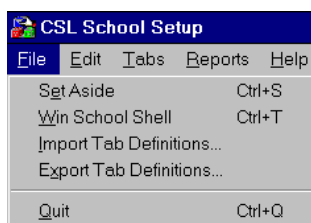
You can import Custom and Multi-Data tab definitions using exported files from your district or from other schools. Your district might, for example, instruct schools to import tabs that have been defined at the district level. Schools can also share pre-defined tabs among themselves by importing them from diskette.

Importing tab definitions will overwrite existing tab definitions which correspond to an imported tab. Existing defined fields, lists, and codes, wherever they appear, will be overwritten by the corresponding fields, codes, and lists that are imported.

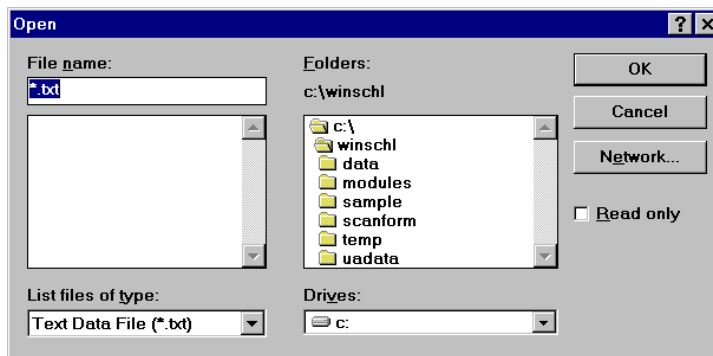
The tab numbers that were exported will be imported into the same numbers during the import, for example, if the exported text file contains Custom Course tab numbers 2, 4, and 6, the import will replace Custom Course tabs 2, 4, and 6.

**To import Custom Tab definitions:**

- 1 From the File menu, choose Import Tab Definitions.



- 2 Locate the Custom Tab definition file, then click OK.



- 3 In the dialog that appears, click OK to complete the import.

OR

Click Print Report to print a report of the file's contents.

# Troubleshooting

---

## You cannot add a new course in Course Details

Ask your Win School System Administrator to set the Access Level to Edit for Resources in Course Details.

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

---

## You receive an error message about unassigned relative days

When you exit School Setup, you will receive the message “Unassigned relative days while trying to exit School Setup” if some of the relative days are not assigned.

**To assign a Relative Day:**

- 1 Double-click Daily Calendar in the Attendance menu.
- 2 Look for any days on the calendar that do not have a dot in the corner. These are days that do not have a Relative Day assigned to them.
- 3 Highlight the day and click the number in the Assign Relative Days bar that you want to assign to that day.
- 4 Click OK.

# Glossary of Terms

## Code

A code can be a status code, a conduct code, or a user-defined code. The code might be assigned to a specific date.

Long Code	Short Code	Present	Absent	Late	Unexcused	Default Absent	Default Tardy
<b>Off Track</b>	<b>Off Track</b>	0.000	0.000	0.000			
<b>Suspended</b>	<b>Suspend</b>	0.000	0.000	0.000	<input type="checkbox"/>		
<b>Not Enrolled</b>	<b>N/A</b>	0.000	0.000	0.000	<input type="checkbox"/>		
<b>Present</b>	<b>Pr</b>	1.000	0.000	0.000			
Absent Excused	A	0.000	1.000	0.000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Absent Unexcused	AU	0.000	1.000	0.000	<input checked="" type="checkbox"/>		
Tardy	T	1.000	0.000	0.000	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Tardy Excused	TE	1.000	0.000	0.000	<input type="checkbox"/>		
Field Trip	F	1.000	0.000	0.000	<input type="checkbox"/>		

## Long Code

A long code is usually a name for a code. It can be an abbreviation or representation. Long codes that are not in bold text can be edited.

## Short Code

A short code can be numeric, alphabetic, or alphanumeric. A chevron before a code indicates that it was scanned into the database. All short codes, except N/A, can be edited.

Short Code	
<b>N/A</b>	<b>N/A</b>
>002	Father
3	Mother
4	Parents
6	Sister
5	SO
>001	Spouse



# Index

---

## A

Address Directions 18  
Address Types 18  
Administrator 8  
Areas 18  
Attendance Codes 27  
Attendance Menu 26  
    Attendance Structure 26  
    Daily Attendance Codes 26  
    Daily Calendar 29  
    Define Day Types 28  
    Reporting Terms for Attendance 28  
Attendance Structure 26

## B

Basics  
    Creating Lists for Popup Menus 16  
    Opening Dialogs 3  
    Settings Report 4

## C

Cities 17  
Codes  
    Entering Student Codes 39  
    user-defined 33  
Conduct Action 40  
Conduct Codes 39  
Contact Relationship 38  
Contacting Technical Support 2  
Counties 17  
Countries 18  
Course Numbers 35  
Course Subject Areas 35  
Course Types 35  
Courses Menu 35, 36

Course Numbers 35  
Course Subject Areas 35  
Course Types 35

Creating Lists for Popup Menus 16  
Custom Codes 41  
Custom Fields 41  
Custom Lists 41  
Custom Tabs Menu 40

## D

Daily Attendance Codes 26  
Daily Calendar 29  
Data  
    standardizing 5  
Default 6  
Define Day Types 28  
Define Grade Levels 14  
Departments 18  
Details List Access 11  
Details Lists menu  
    Counties  
        in United Kingdom 17  
        States 17  
District Data Integrator (DDI) 5, 12, 13, 42, 43,  
    44, 45  
District Extract 5, 12, 13, 42, 43, 44, 45

## E

eClass Attendance Password 10  
eClass Grades Password 11  
Edit District List 5  
Edit Points & Credits Table 24  
Electronic mail  
    for comments to Chancery 2  
Email  
    for Technical Support 2  
Employer Types 18  
Ethnic Categories 38  
Extra spaces 4

**F**

Fax for Technical Support 2  
 Feedback for documentation 2  
 Fields  
     user-defined 33  
 Flags  
     user-defined 33

**G**

Generations 19

**H**

Home Languages 38

**I**

Ignore passwords 8

**L**

Lists  
     merge items 6  
     user-defined 33  
 Lists for Popup Menus 5, 16  
 Localize 11  
 Lunch Status 38

**M**

Merge  
     list items 6  
 Multi-Data Tabs 43

**N**

Normal Programs 37

**O**

Open District 5, 12, 13, 42, 43, 44, 45  
 Open District schools 4, 5  
 Opening Dialogs 3

**P**

Password  
     eClass Attendance 10  
     eClass Grades 11  
 Passwords Menu  
     Access level 9  
     Details List Access 11  
     Ignore Passwords 8  
     System Passwords 8  
     User Passwords 9  
 Period Labels 22  
 Periods 21  
 Phone number, Technical Support 2  
 Popup menus - Creating lists 5  
 Position - Teachers 36  
 Principal 36  
 Provinces 17  
 Publishers 19

**R**

Report Card Bins 23  
 Report Cards Menu 23  
     Edit Points & Credits 24  
     Report Card Bins 23  
 Reporting Terms For Attendance 28  
 Reservation Labels 22  
 Resource Locations 19  
 Resource Types 19  
 Room Clone 33  
 Room Setup 32  
 Room Types 31  
 Rooms Menu 31  
     Room Setup 32  
     Room Types 31

**S**

Scheduler Menu 19  
     Period Labels 22

- Reservation Labels 22
  - Scheduling Aide Types 23
  - Scheduling Drop Date 23
  - Set Scheduler Terms 19
  - Teacher Course Load 21
  - Timetable Structure 20
  - Timetable Structure for Attendance without Scheduler 21
  - Scheduling Aide Types 23
  - Scheduling Drop Date 23
  - School Information 13
  - School Menu
    - Define Grade Levels 14
    - Localize 11
    - School Information 13
    - School Names 12, 13
    - School Year 14
    - Student Address Format 12
    - Transfer Recording 15
    - Withdrawal Inactive Day 16
    - Year Round School 16
    - Year Round Tracks 16
  - School Names 13
  - School Year 14
  - Set Scheduler Terms 19
  - Settings Report 4
  - Short Code 5
  - Standardizing data 5
  - States 17
  - Status Codes 39
  - Student - Codes/Actions Menu 39
    - Conduct Action 40
    - Conduct Codes 39
    - Status Codes 39
  - Student - General Menu 36
    - Contact Relationship 38
    - Ethnic Categories 38
    - Home Languages 38
    - Lunch Status 38
    - Normal Programs 37
    - Student Age Reporting Date 39
    - Student Groups 37
    - Student Numbers 36
    - Transportation 38
  - Student Address Format 12
  - Student Age Reporting Date 39
  - Student Groups 37
  - Student Numbers 36
  - Symbols
    - » 6
  - System administrator 8
  - System Passwords 8
- T**
- Tabs
    - Custom Tabs 40, 43
    - Importing and Exporting 46
    - Multi-Data Tabs 43
  - Tabs Menu 43
  - Teacher Course Load 21
  - Teacher Position 36
  - Teachers Menu
    - Teacher - Position 36
  - Technical Support, contacting 2
  - Timetable Structure for Attendance, without Scheduler 21
  - Titles 18
  - Tracks 16
  - Trailing Spaces report 4
  - Transfer Recording 15
  - Transportation 38
  - Troubleshooting
    - Unassigned Relative Days error message 48
- U**
- Unassigned Relative Days 48
  - User passwords 9

User-defined

codes 33

fields 33

flags 33

lists 33

**W**

Website for Chancery 2

Win School

standardizing data 5

Withdrawal Inactive Day 16

**Y**

Year Round School 16

Year Round Tracks 16

Yearly Updating 7