AdminForSchools

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Quick Start Guide

The system, when it is first turned on for you, will come with default settings already set-up but no data. This guide will help you quickly setup your first Course and Class and register a student to it. For more detailed explanation of the various functions see the rest of this manual.

In addition, there is the built-in customer support option available by clicking the support icon in the top right of the screen.

This quick start section is not a complete guide to the various functions, but is instead a short tutorial on creating your first class within the system and assigning a student to it. See the rest of this manual for more detailed explanations of the various functions.

The following four steps should be completed in order they appear below:

1. Adding a teacher

- Go to **Management**->**Staff Management**
- Select the Staff Group called **Teaching Staff**
- Click on the **icon** next to the **No Staff in this Group** message
- Enter the teachers **Firstname**
- Create a system **LoginID** for the teacher, this must be at least 6 characters long
- Create an initial **Password** for the teacher this must be at least 6 characters long and contain a mix of upper and lowercase letters and at least 1 number. The field will turn green when a valid password has been entered
- Click the **[Save]** button

2. Creating a course

For this example, you are going to create a course of type **Per-Class**. Each lesson is **1 hour** long, there is no registration fee, and the cost for a single lesson is **24.50**

This is the course type for classes where the student has to pay a fee every time they attend a class. For more details of the different course types and other course options see the Courses section.

- Go to **Management**->**Lesson Management**->**Manage Courses**
- Click on the icon
- Type in a name for your course
- Click the [**Save]** button
- Change the **Payment Type** field to **Per-Class**
- Change the **Class Fee** to **24.50**
- Click the **[Save]** button

3. Creating a class

In the course we just created we are now going to create a class called English 101 that starts at 17:00, and occurs every Monday and Wednesday.

- Go to **Management**->**Lesson Management**->**Manage Classes**
- Click on +
- In the **Class name** field type **English 101**
- Change the **Start time** to **17:00**
- In **Staff Group** select **Teaching Staff**
- In teacher select the name of the Teacher you created
- Next to **Days** Click on both the **M** and the **W** to indicate Monday and Wednesday
- Click the **[Save]** button

4. Adding a student

Finally We are going to add the details for a new student called **Pedro Gomez Smith** who is **under 18** and has a Birthday on **18 July 2018**, and tell the system that he is enrolled in the course and class we just created. His Mothers Name is **Anne Smith**, and her Mobile number is **987654321**

- Go to **Students**->**Add New Student**

<u>Student Details</u>

- Make sure the **Course Field** is the name of the course you created
- Make sure the **Type** field says **Child**
- In **Firstname** type **Pedro**
- In **Lastname** Type **Gomez Smith**
- In **DOB** Select **18 July 2018**
- Click the **[Save]** button

<u>Contact Details</u>

- In the **Mother** Field type **Anne Smith**
- In **Mobile** field for the **Mother** type **987654321**
- Click the **[Save]** button

<u>Class Details</u>

- Click the + icon next to the Course name
- Select **English 101** from the class list
- Click the **[Save]** button
- Click the **[Next]** button

<u>Payments</u>

- At this time we are not going to process a payment so click **[Next]** again

Congratulations Pedro is now enrolled on your course in the English 101 class.

You can now continue to add more students if you wish.

Courses

Course Types

The AdminForSchools system allows you to create courses for classes with four different payment structures. For classes and courses where you are not going to accept direct payment from the student or their parents, you must still select the best fit payment type for that course.

For example, if you are delivering classes to employees of corporate client, and you will be invoicing the company directly rather than the students, the best fit payment type would be **Per Class** so you can still track the individual student's attendance, and if necessary, adjust the invoice to the company. In this example if you need to supply completed registers to the company with your invoice go to **Registers**->**Print Register Data**

Payment Types

Scheduled

These are classes that happen on a regular basis with a fixed payment timetable.

For example, a 1 hour class that occurs twice every week on a Tuesday and Thursday at 17:30. A fixed fee payment is due once a week or month for all the classes in that time. The AdminForSchools system will produce reports on any outstanding payments for past periods.

Full Fee

This is course containing classes where a single fee is due for the full course, but students (parents) can make part payments at any time.

For example, a Summer School that has total fee of 500 Euros for the whole course. Parents can come in at any time from initial registration and make part payments towards the total fee.

Per Class

These are classes where a payment is due every time the student attends a class.

For example, 1 to 1 private classes. Every time the student attends the class a payment is due/made. When competing the registers three options are available to the teacher **Present**, **Absent** and **Cancelled**. You have the option in the system configuration to decide if you want to automatically charge students for non-attendance due to un-planned absence or Cancellation. (see: **Registers->Register Settings**)

Per Hour

This is a type of Full Fee course where you are selling the classes based on blocks of time, and you need to keep track of both the amount of money paid and the amount of hours used.

For example, you have an on-going group class that you are selling in 10 hour blocks to the students. They buy 10 hours of classes, and when they have used 10 hours, they have the option of continuing by buying further blocks of hours. The system automatically, through the completion of the class registers, keeps track of the hours used and will notify Administration staff when a student is running low on available hours.

Creating a Course

- Go to **Management** -> **Lesson Management** -> **Manage Courses**
- Click on the [+] icon
- Type in a name for the course
- Click **[Save]**

Deleting Courses

Courses can only be deleted if there are no students currently assigned to that course. Once deleted a course cannot be recovered.

To delete a Course

- Go to **Management** -> **Lesson Management** -> **Manage Courses**
- Click on the [delete] icon next to course you want to delete
- Click **[Yes]** to complete the deletion.

Stopping a Course before the Year end

There may be times where a course needs to be stopped before the year end. For example you have a course that normally only runs for 3 months. Then ends, and then restarts with a new set of students.

Important: If you stop a course then all the classes and students in those classes are removed from the course. For any affected students if they were only registered to the one course those students details can be found by doing a search of "**All Students**" or via: **Information->Students->Students with no Class**

To stop the course:

- Go to **Management** -> **Lesson Management** -> **Manage Courses**
- Click on the [stop] icon next to course you want to delete
- Click **[Yes]** to confirm the action.
- Click **[Yes]** again to confirm you understand the implications.

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Editing Course Details

Course name:	This is the name you gave to this course
Start Date:	The day the course starts. Registers etc. are unavailable before this date
Track Course Payments:	If you don't want to track or accept payments from the individual students on the course then un-tick this option. For example you might have a corporate client who is paying for courses for their employees and you invoice the company directly Important: Once classes and students have been assigned to a course this option cannot be changed.
Default Class length:	How long is a single standard class for this course
Has registration fee of:	If this course has an initial registration fee, tick the box and enter the fee
Payment Type:	Here you select the payment structure to use for the course from Scheduled, Full fee, Per Class, Per hour. Important: If any students and classes are registered for this course this option can not be changed.
Fee/Payment	(this can appear as the following depending on course type) • Schedule Payment: The default amount you are charging for each of the regular payments • Course fee: The default full amount due for the course. • Class fee: The default amount the student has to pay for a single class • Hourly Fee: The default amount you are charging for 1 hour of course time
Tax Rate:*	The sales tax option to apply to fees for this course
Finance Code:*	The finance code you want to allocate for course fees received
Receipt Label:	The course name you want to appear on printed receipts if different to the course name used internally

Once all fields are completed/Amended click on **[Save]**

**These two options only appear if the Finance module is active*

For Scheduled Courses with Track Payments

You now have to define the payment schedule for this course in the current academic year.

Click on the +

Label:	This is the text you want to appear on screen and in receipts for this payment
Payment Date:	The Date the payment is due on/by
Amount due:	The amount of this payment

Click **[Save]** to save your data

Repeat the above for every payment that is due during the Academic year. If the course has a registration fee this is added to the schedule automatically with the Start Date as its Payment Due date.

Creating a copy of a course at another site

If you have the multi-site option enabled you can create of copy a course at another site. This only copies the basic course information and payment schedule information. It doesn't copy classes or students.

To copy a course

- Select **Management** -> **Lesson Management** -> **Manage Courses**
- Click on the name of the course you want to copy
- Click the **[Copy to Site]** button
- Select the site you want to create the copy at
- Click **[Save]**

Note: The course is copied with a temporary name you should now switch to the other site and update the name an any other details that are specific to that site.

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Classes

Within the AdminForSchools system a class is a unit of unique teaching time. Whether it is a group class for 20 students, or a 1-1 class for a single student. At the start of each academic year you will need to create the classes for that year.

Creating a Class

- Select on **Management** -> **Lesson Management** -> **Manage Classes**
- Select the Course you want the class to belong to
- Click on + icon

Selecting a class to edit or to delete

- Select on **Management** -> **Lesson Management** -> **Manage Classes**
- Select the Course the class to belongs to
- Click on the class you want to edit/delete

Editing Class Details

Class name:	The name for this class, the system will automatically add course, time and teacher details when displaying the class in other parts of the system. Typically, the class name is something that identifies this particular class. Possibly the name of the book being followed, or the level being taught.
Start time:	The time of day at which this class is scheduled to start. If the exact time isn't listed pick the nearest time before the start of the class (see the note below)
Length:	The length of the class, if the exact length isn't available pick the best fit that is slightly longer than the actual class (see the note below)
Payment Hours:	This only appears for Per-Hour courses, and is the default number of hours that a student will purchase for the class.
Time:	The system will populate this automatically from the details you entered for start time and length. However you can change this to the actual start and end times if different. It is the contents of this field that appears on the registers, student reports etc.
Fee per Hour:	This only appears for Per-Hour courses. This is the default amount the student has to pay for 1 hour of class time.
Fee per Class:	This field only appears if the course is of type Per-Class. This is the default amount the student has to pay for every class they attend.
Staff Group:	Select the group that the teacher who is going to teach the class belongs to
Teacher:	Select the name of the teacher who is going to teach the class

Days:	Click on the days of the week that this class is going to occur (you can select more than one)

Click **[Save]** to save your data

A note about Start Time and Length

The information from these fields is used for the staff timetabling and scheduling functionality only. For example if the class is 50 minutes long you will want to select a class length of 1 hour so the teacher has a few free minutes between classes.

Adding Students to a class

The AdminForSchools system has two main ways of adding students to a specific class.

1: Adding a single student to a class

This functionality is the normal method for adding a new student to a class.

- Go to **Students** -> **Student Information**
- Find the student you want to update
- Click on the Class tab
- Click on the + icon
- Select the class
- Click **[Save]**

2: Adding/removing students in bulk

Important: Do not use this function to move students between classes, by removing them from one class, and then adding to another. If you do this the system may lose track of some of their payment information for the current academic year.

This function is used when you generally want to add several new or returning students to a particular class.

- Go to **Management** -> **Lesson Management** -> **Manage Students**
- Select the course
- Select the class

Display Students: Here you can choose to display all students who are registered to your select course, or only those students who are registered to the course but aren't currently in a class.

Left List

By default the list on the left shows all the students whose first name begins with the letter A who aren't in the selected class. If you wish to see different students click the and select a letter

Right List

These are all the students currently in the selected class

To Add one or more students to a class

Click on their name in the left list, if you want to add more than one student hold down the [Shift] key on the keyboard, the click on the Right Arrow [->] between the two lists

To Remove one or more students from a class

Click on their name in the right list, if you want to add more than one student hold down the [Shift] key on the keyboard, the click on the left Arrow [->] between the two lists

Removing a student from a class

Use this function if you want to remove a student from a class, but keep their details active with the system because they are still enrolled with you.

If they are leaving your school use the Status button on the student information tab and change it to inactive instead of removing the student from all classes and courses first which isn’t necessary.

Remove from Class

- Got to **Students** -> **Student Information**
- Find the student you want to update
- Click on the class tab
- Click on the icon to the right of the class you wish to remove the student from
- Click **[Yes]**

Reports

Creating Report Layout Designs

The content of student reports can be customised to suit your specific needs, and can contain any number of

- Text boxes
- Teacher Comment boxes
- Integer 1-10 values
- Decimal Values
- Percentages (0-100%)
- Fixed text selected from a list (see Report Selection Lists below)

In addition the main body for the report the system will automatically add student and class information. Each of your courses can have a different report layout if required.

Creating a new Report Design

- Got to **Reports** -> **Create Report Layout**
- Select the Course the report is for
- Click the [+] to create a new layout
- Give the Layout design a unique name
- Select a paper layout to print the report on
- By default the system comes with default Landscape and portrait layouts with your logo in the top left corner. See Uploading Paper Types if you want to upload other blank page layouts.
- Click **[Save]**

Copying an existing design

- Select the course the current design is being used for
- Click icon to the left right of your chosen layout
- Select the course you want to attach the copy to
- Click **[Copy]**

Changing the name of a design

- Click on the design name you want to change
- In the pop up box change the name as required
- Click the close [xx] icon

Deleting a design

You can only delete report layout designs that have not been used for inputting and publishing data. Designs that are safe to delete have the to the right of their name.

Making a design live

In order to input data and publish reports to parents, a design must be made live. The current live design is marked by a [Tick] icon. If no designs are live or you want to change the live design click the [X] cross icon next to the name of the design you want to make live. Once a design is live it can then be used in report cycles. See Managing Report Cycles to see how to create a new report cycle.

Important: A design must be made live before the teachers start to input data. If you change which design is live after they have started to input data, data may be lost. It is strongly not recommended that you change a report design in the middle of an academic year as the student progress functionality then wont work correctly.

Editing a design

A report design consists of one or more items. These items can be of type

- **Header**

This is a fixed block of text that appears on all reports

- **Input Comment**

This is text that the teacher types in

- **Input 0-10**

This is an integer value 0-10 that the teach selects

- **Input 0-100%**

This is an integer percentage that the teacher types in

- **Input Decimal**

This is a positive (including zero) decimal value that the teacher types in, there is no upper limit on the value

- **List Select**

This is a static list of values that the teacher selects one off. See Creating report Lists below for details on how to create this lists. The list can contain any text and coupe be grades A_F or words like Excellent, Good etc.

To add a new report item

- Click on the + to Add a new item
- Select the type of element you want to add to the report
- Type in a label that will appear next to item on the report

  This label appears both on the final report that is sent to parents, and as an on-screen prompt for teachers when completing the student reports.
- Click **[Save]**

To change the order of the report items

- Simply drag the report item you want to move to the new place on the list

To delete a report item

- Click on the to the right of the item you want to delete

Important: If reports have been created using the item you want to delete, all data on any existing reports for that item will also be deleted. This can not be un-done. If you want to remove an item from a layout but keep the item on old reports you should copy the layout and delete the item from the copy.

Report Selection Lists

A report selection list is a list that you can create to allow teachers to select from a set of fixed text entries rather than type in a value or enter free form text. For Example you might want them to select from the Phrases **Excellent**, **Good**, **Ok**, **Poor**, **Very Poor** rather than type in a value from 1 to 10. These phrases will also appear on the term report that is sent to parents.

To create a selection list

- Go to **Reports** -> **Edit report Selection lists**
- Click on the +
- Type in a unique name for the list. This is the name that appears when creating a Report design layout. (Note: All selection lists are available to all report layouts regardless of Course)
- Click **[Save]**

Report List Items

A list item consists of three components:

Order	The order in which the items appear on the list
Label	This is the text that the teacher sees to select, and the text that appears on the published report.
Value	A numeric value for this label. This is used so the student progress function can compare reports. Higher values are better than lower ones. The numbers don't need to be continuous, but should be sensible. For example **Excellent** might be **10**, **Good** an **8**, **Ok** a **6**, **Poor** a **4** and Very Poor a **2**. You should not use zero.

To add an item to the list

In the bottom most line of the list:

- Enter a value in the order field. If this value is the same as an existing one the new item will be inserted at this position
- Type in a label for the list item
- Enter a unique value for the item

- Click on the +

Deleting items from a list

Click on the 🗑 to the right of the chosen item. Note you can only delete items if the list has not been used in a student report.

Managing Report Cycles

A report cycle is the processing of entering data and publishing it to parents. Typically, most centres would do this once per term, but there is no reason why it could not be monthly or annually instead. Different courses can have different cycle frequencies.

Creating a new report cycle

- Select the course you want to create a report cycle for
- Click on the + icon

Report Cycle	The name for this report cycle. Ie Term 1 2024
Issue date	The date on which you plan to publish these reports to parents. The issue date must be a date after today.
Report Style	The name of the current live report layout
Report editing open	Can teachers enter data for this report
Reports approval	The approval mechanism you want to adopt. Manual: A senior member of staff will look at each report and approve it for publication Automatic: The system will automatically approve each report as it is completed
Reports published	Have any of the reports in this report cycle been published?

- Click **[Save]** to save your data

Editing a report cycle

The reports cycle list shows all the report cycles for this course in the current academic year. The current cycle is shown by a red dot to the left of the name. To edit the details for a report cycle, click on its name.

Approving and Publishing Term Reports

Approving reports and then publishing them is two separate steps, and don't need to be done at the same time. If you have the manual Approval option set you can go through all the reports and approve them then come back on the Issue date and publish them to parents. If you have Approvals set to automatic (not recommened) then you can skip the approval step and go straight to the publish step.

Click on the [Publish] icon to the right of the cycle you want to Approve/Publish

You are now presented with a list of all the current classes in the course. To the right of the class name is three columns

Aprov	The number of reports for this class that have already been approved
Rpts	The number of reports for this class that have been completed by the teacher
Studs	The current number of students in the class

Note: It is possible that the number of Approvals and Reports is greater than the number of students, this happens if a report is created for a student who then leaves the class.

Approving Term Reports

This step allows you to look at each report and make any alterations before it is made available to parents. Once a report has been approved teachers can no long make changes to it, but senior staff can through the Reports Management option.

Click on the name of the class whose reports you want to Approve

From the list of students select a student report to approve by clicking on the student's name

You will now see the report information that was entered by the teacher. You can change any of it.

When you are happy with the contents of the report click the [Approve] button

Translating Comment text

If you have the translation option turned on (See Settings->System Setup) a translate button will appear next to each of the comment fields. Click on this to translate the teacher's text. In automatic mode this will automatically show you the text in the chosen language. If necessary, you can make amendments to the translated text before clicking on the [Save] button.

Note: Once the text has been translated and saved it cannot be returned to its original language.

Publishing Term Reports

Publishing Reports is the step where you make student reports available to parents in the parental portal, and if enabled sent directly to them by email (see below).

To publish the reports for a class once they are Approved but un-Published reports for a class a [publish] icon appears next to the class's name. Click on this to publish these reports to parents. If you have one or two missing reports for a class you can publish the completed ones and come back later to approve and publish the outstanding reports. The system will not resend emails for already published reports.

Sending Reports by Email

By default, initially this feature is turned off so you don't accidentally send reports to parents until you are ready. To enable this feature click on the icon in the top right of the main Reports Management page.

Send reports by Email?	Either On or Off
Email subject	The subject line of the email message when it is sent. Note the system automatically adds the students name to the end of the subject text
Email message	An optional message that you can add to the top of the email above the report when it is sent. Note the system will automatically include the personalised parent portal login information to the bottom of the email.

Important: the above email settings apply to all reports and are not course specific so you should not include any course specific information in the subject and message text.

Grade Books

Grade books are created by teachers to record the results of any in class assessments they have done. Senior staff can review the entries, and after review publish the results to the parents' portal.

Creating a new Assessment (Teachers)

- Select the class the assessment is for
- Click the + Create new assessment icon

Name	A name for this assessment
Max Mark:	The maximum possible mark the student can get for this assessment. For example if the total available marks was 72, this would be 72.
Pass Mark	This is the number of marks the student must get to pass the assessment. Based on the maximum mark and the pass % defined in the system settings this is automatically calculated. But can be changed
Allow Decimals	Allow marks to include decimal values.
Grading System	The grading system to use to display the results to parents. Available options are: **Calculated %** : The system will calculate the % score **Calculated 1-10**: The system will calculate an integer value between 1 and 10 **Calculated 0.0-10.0**: The system will calculate a decimal value between 0 and 10 **Raw XX/YY**: the system will show the actual number of marks awarded and the maximum mark available

- Click **[Save]** to save your data

Entering Grades

- Select the class you want to enter grades for
- Click on the name of the assessment
- For each of the students enter (or update) the actual number of marks they were awarded.
- Note after entering the mark the system will show the grade they will be awarded as seen by the parents.
- Click **[Save]** to save your data

Managing Assessments (Senior staff)

Three additional options are available to senior staff.

Locking an assessment
This allows you to prevent the teacher for updating or entering any grades in the selected assessment. To lock an assessment, click on the red [X] next to the assessments name in the locked column. To unlock an assessment, click on the Green [tick] icon.

Publishing an assessment
Publishing assessment results to the parents' portal is optional (currently assessment results aren't emailed to parents). To publish an assessment, click on the red [X] next to the assessments name in the Published column. To remove an assessment from the parents portal click on the Green [tick] icon in the Published column.

Sending assessment results by email
You can optionally send the results of assessments to the students listed contact email addresses. If the "Send by grades by email" option is turned on (see: Enabling Assessment Grades by Email) You can send the results by selecting the checkbox next to the assessment name and then clicking the [Email Selected] button. You can also choose to send the results of more than one assessment in the email by selecting multiple assessments before clicking the [Email Selected] button. **Note** assessments must be published in the parent portal before they can be sent by email. Unlike term reports assessments are **not** **automatically** sent out when they are published.

Complete?
This column indicates whether or not grades for all students have been entered.

Creating a new assessment for a whole Course (Management Only)
Site management have the ability to add an assessment automatically to all the classes of a selected course. This is especially useful if you have a set of standard exams that happen on a regular basis for all the students and saves the teachers having to individually create an assessment for each of their classes. The availability of this menu item is menu item is controlled in User Permissions (see: Controlling Access Permissions)

- Go to **Grade Book** -> **Create Course Assessments**
- Select the course you want the assessment to apply to
- Click on the [+] icon

Name	A name for this assessment
Max Mark:	The maximum possible mark the student can get for this assessment. For example if the total available marks was 72, this would be 72.
Pass Mark	This is the number of marks the student must get to pass the assessment. Based on the maximum mark and the pass % defined in the system settings this is automatically calculated. But can be changed
Allow Decimals	Allow marks to include decimal values.
Grading System	The grading system to use to display the results to parents. Available options are: **Calculated %** : The system will calculate the % score

	Calculated 1-10: The system will calculate an integer value between 1 and 10 **Calculated 0.0-10.0**: The system will calculate a decimal value between 0 and 10 **Raw XX/YY**: the system will show the actual number of marks awarded and the maximum mark available
Prevent Changes	If this is set to **Yes** then teachers will not be able to make any changes to the assessment. If this is set to **No** then teachers will be able to make changes to the assessment for each of the classes that they teach. For example if the pass mark or maximum mark is different for different levels of class.

- Click **[Save]** to save the assessment

Amending or deleting whole course Assessments

If you need to make changes to a whole course assessment, you can.

Important: if the Prevent changes option is set to No, and teachers have made changes to the assessment for some of their classes, making changes here will reset all the assessments back to the details you select here. Also, If a teacher has deleted the assessment from a class making a change here will not re-create the assessment in that class.

- Go to **Grade Book** -> **Create Course Assessments**
- Select the appropriate course
- Click on the name of the assessment you want to change

Enabling Assessment Grades by Email

By default, initially this feature is turned off so you don't accidentally send assessment emails to parents until you are ready. To enable this feature click on the icon in the top right of the main Assessments Management page.

Send assessments by Email?	Either On or Off
Email subject	The subject line of the email message when it is sent. Note the system automatically adds the students name to the end of the subject text
Email message	An optional message that you can add to the top of the email above the assessment details when it is sent. Note the system will automatically include the personalised parent portal login information to the bottom of the email.

Important: The above email settings apply to all assessment emails and are not course specific so you should not include any course or class specific information in the subject and message text.

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Lesson Plans

The lesson plans feature allows you to provide a standardised set of lesson plans for teachers to follow that are teaching the same subject and level. For example if you have several teachers teaching the same level using the same book you can provide pre-defined plans that follow your target pace, thus providing a consistent learning experience for all these students.

You will also then be able to track an individual classes progress through the lesson diary function (see Lesson Diaries)

Creating a Lesson Plan

- Click on [+] icon
- Enter a title for the plan. Eg. Advanced Maths Book 1
- Enter some optional notes about the plan that are important.
- Click **[Save]**

Deleting a Lesson Plan

- Select the plan you want to delete
- Click on the icon
- Click on the [Delete] button
- Select **[Yes]**

Note: The plan and all its elements are deleted and cannot be restored.

Printing a complete Lesson Plan

- Select the plan you want to print
- Click the icon in the top right

Lesson Plan Elements

Every lesson plan contains a number of elements. Each element should define the tasks and targets for a logical part of the course, where its an individual lesson, chapter in book or specific skill etc.

Creating Plan Elements

- Creating a Lesson plan Element
- Select the plan the element is going to belong to.
- Click the [+] icon to create plan element

Element Title	A unique name for this element within the current plan
In Class	Specific topics you want to be covered in class
Homework	Any homework tasks to set
Notes	Additional relevant notes, could be end of class filler activities for example.

- Click **[Save]** to save your data

Note: The In Class / Homework / Notes fields can contain text that is formatted (Bold, Underline, bullet points etc) so it looks better when printed out.

Re-Ordering Plan Elements

The individual elements within a plan can be re-ordered by dragging and dropping the plan elements on the elements list

Deleting Plan Elements

To delete a plan element click the to the right of the elements name

Printing a Plan Element

- Select the lesson plan
- Click the icon to the right of the Element name

Lesson Diaries

A lesson diary is the opposite of a lesson plan. They are completed by the teacher after the class to remind them what they covered in a particular class, and any other notes they might want to make about a class.

They are particularly useful if a teacher is unable to teach a particular class, and a cover teacher has to be brought in. The cover teacher can instantly see what the class was doing in the last lesson.

Creating a Diary Entry (Teachers)

- Select Planning->Write Lesson Diary
- Select The class you want to write the diary for

The system will now provide a list of the last 20 lessons for this class with a brief summary of the Diary contents. If a red warning [] icon shows next to a lesson it means there was no diary entry for that lesson.

- Click on the diary summary or Warning icon to write/edit an entry

If you want to create a diary entry for a class that occurred outside of the normal class schedule click on the [+] next to the class.

Plan:	(Optional) The name of the lesson plan you were following for this class
Plan Part:	(Optional) The lesson plan Element you were following for this particular lesson
Date:	The date of the class. If this is an out of schedule class change this to the date the lesson actually occurred on
Notes:	Any notes you want to make about the lesson

- Click **[Save]** to save your data

The system will also show you the names of all the students that were absent from the selected lesson. If you click on a students name it will show you the diary entries for all the lesson they have missed.

Printing a Class Lesson Diary

- Select the class you want to print the Diary for
- Click on the [print] icon in the top right.

Viewing Lesson Diaries (Senior Staff)

- Select Planning->View Lesson Diary
- Select the course
- Select the teacher
- Select the Class

- From the list of completed diary entries click on the one you want to see

Sending Lesson Notes to Parents

If desired the system can send a short note to all the parents of students in a particular class. To help with parent engagement in the course you might want to do this once a week or once a month. Parents of younger students particularly like this sort of information. The message is sent both as an email and is available in the Parent Portal.

Note: By default, this facility is only available to senior staff, however if you want to give the teachers the ability to send the messages in **System Setup** change "**Teachers can send Msgs?"** to **On** (See System Settings)

Sending a Parent note (Senior Staff)

- While viewing a chosen lesson diary entry type your message into the To Parents field
- Click the **[Send Message]** button

Sending a Parent Note (Teachers)

- Select the diary entry (lesson) that you want to send the note about
- Click the [Parent Message] button
- Complete the Msg for parents field
- Click the **[Send Message]** button

Finding classes with missing Lesson Diaries

This option will allow you to see and print a list of classes for a given course in a specific week that do not have lesson diaries associated with them.

- Go to **Planning** -> **Missing Lesson Diaries**
- Select the course
- Select the week
- To print a list of all the missing diaries click the icon at the top of the page
- To print a list of diaries missing for a specific teacher click the icon next to the teacher's name

Registers

The Registers function allows teachers to record student attendance directly into the system from a laptop or tablet in the classroom. Administration staff can also input student attendance information and provide printed copies of the register for teachers to use if they don't have online access to the system.

Recording student attendance (Teachers)

- Click the home screen register icon
- Select the correct course if applicable.
- A list of all the teachers' classes will be shown, Select the appropriate class
- Select from the list the date you want to record the attendance for
  - If there is a warning symbol [!] next to the date it means the register hasn't been completed for that lesson
  - If the date you want to record the attendance for is not on the list, enter the date into the date field and click the + when it appears
  - For Per-Hour courses, when the amount of time is being tracked a pop-up will appear to confirm the actual length of this lesson.
- A list of students that are enrolled in the selected class will then appear
- Click the box next to their name records them as being:
  - Present (first click)
  - Absent (second click)
  - Cancelled (third click)

    Note: Cancelled is only available for certain course types.

Teacher covering another Teachers class

If the teacher is covering for a class that is not their own, instead of using the Home page Registers Icon they should select Registers->Enter Registers (All) from the left menu. This will provide a list of all classes for the course. They can they select the appropriate class.

When the lesson date is selected the list of students appears a field called Alt teacher should show the current teachers name, if it doesn't change it to the correct one.

Recording student attendance (Administration staff)

Administration staff can manually enter registers from printed ones supplied by the teachers.

- Go to **Registers**->**Enter registers (All)**
- Select the course
- Select the class
- Select from the list the date you want to record the attendance for
  - If there is a warning symbol [!] next to the date it means the register hasn't been completed for that lesson
  - If the date you want to record the attendance for is not on the list, enter the date into the date field and click the + when it appears
  - For Per-Hour courses, when the amount of time is being tracked a pop-up will appear to confirm the actual length of this lesson.
- A list of students that are enrolled in the selected class will then appear
- If the class was covered by a substitute teacher, then select the substitute teacher from the Alt Teacher list

AdminForSchools

- Click the box next to their name records them as being:
    - Present (first click)
    - Absent (second click)
    - Cancelled (third click)

      Note: Cancelled is only available for certain course types.
- If the course is tracking payments and a payment is due for the lesson when the student is marked as Present a pay icon $ will appear next to their name. Click on this to process the payment. You can also require payments for Absent or Cancelled by changing the setting in Register Settings (see below)

Printing Completed Registers

If you need to print out a completed register, for example for a corporate client you invoice monthly. Go to **Registers**->**Print Register Data**

- Select the month you are interested in
- Select The appropriate course (If you want to print the registers for all the classes then click the icon next to the **Course** select)
- Select The appropriate teacher (If you want to print the registers for all the classes the teacher teaches then click the icon next to the **Teacher** select)
- Select the appropriate class teacher (If you want to print the registers for just this class then click the icon next to the **Class** select)

Register Settings

Go to **Registers**->**Register Settings**

Hide in-active students	If a student has left a class part way through a course, setting this option will remove their name from any past registers
Show photo permission	Display an indicator on screen and on printed registers if the student has got the photo permission option set
Show parent hold	Display an indicator on screen and on printed registers if the student has got the parent hold option set
Show age	Display the students age (if they have a Date of Birth entered) on screen and on printed registers
Show birthday	Display an indicator on screen and on printed registers if that particular day is the students
Pay on Absent	Setting this to **On** will cause an automatic payment if the Absent option is selected when a register is completed for non-scheduled course types
Pay on Cancelled	Setting this to **On** will cause an automatic payment if the Cancelled option is selected when a register is completed for non-scheduled course types

TimeSheets

The Timesheets function allows you to record the hours that the individual staff have worked. It can be updated manually by the Administration staff, but must of the data is automatically generated when the class registers are completed.

There is also the facility to manually record any non-teaching hours they have done.

Updating Timesheet Data

- Go to **Timesheets**->**Enter Timesheets**

By default the system will show the list of staff who have lessons scheduled for today. If you are entering data for a previous date, change the date field to your chosen date.

If the staff member whose details you want to update was not scheduled to teach on the chosen date you can include other staff by selecting additional staff from other staff groups.

- To select a staff member click on their **name**

The system will list any classes they were scheduled to teach on that date, you can update the status Present/Absent by clicking on the status indicator

Recording non-teaching hours

If they worked on non-teaching or non-scheduled activity:

- Complete the **Other hours** field with a short description of the work,
- Change the **time** to the amount of time they worked
- Click the **[Save]** button

External Exams and Certificates

With this functionality you can record the details of any external exams and certificates that your students have taken. You can also record any payments due for those exams from the students.

Details of the certificates/exam exist within logical groups. For example if you are a language academy teaching different languages you might have one group called English Exams, another called German Exams etc.

Creating an Exam Group

- Go to **Management**->**External Exams**
- Click on the + next to the page title
- Type in a name for the **Exam Group**
- Click the **[Save]** button

Creating an Exam/Certificate

- Click on the + to the right of the Exam Group name you want to create the exam in

Exam Name	The name of the Exam/Certificate
Exam Board	The name of the organisation responsible for administering the exam
Fee	The fee you will charge the students for the exam/certificate
Display After	If you have more than one exam in this group which one you want this exam to appear after in the list (You might want to sort the list by level rather than alphabetically)

- Click [**Save**]/[**Update**] to save your data

Deleting an Exam/Certificate from the system

If you remove an Exam/Certificate from the list, The exam will still appear for students who have done the exam in the past in their history, but it will no longer be available for students to be awarded it in the future.

- To delete click on the to the right of the exam name

Deleting an Exam Group from the system

If you delete an exam group all the exam/certificates in that group will also be deleted

- To delete a Group click on the group name
- Click the [**Delete**] button

Assigning an Exam/Certificate to a Student

- Go to **Students**->**Student information**->*{student name}*
- Click on the **Ext. Exams** Tab
- Click on + icon next to the tab title

Exam / Certificate	The exam or certificate you want to register the student for
Exam date	The Date they will take the Exam (or took the exam)
Fee to Pay?	A payment is due from the student for registering for this exam. Yes/No If you are using the system to recod exams that the student has done in the passed always set this to No for these

- Click the [**save**] button

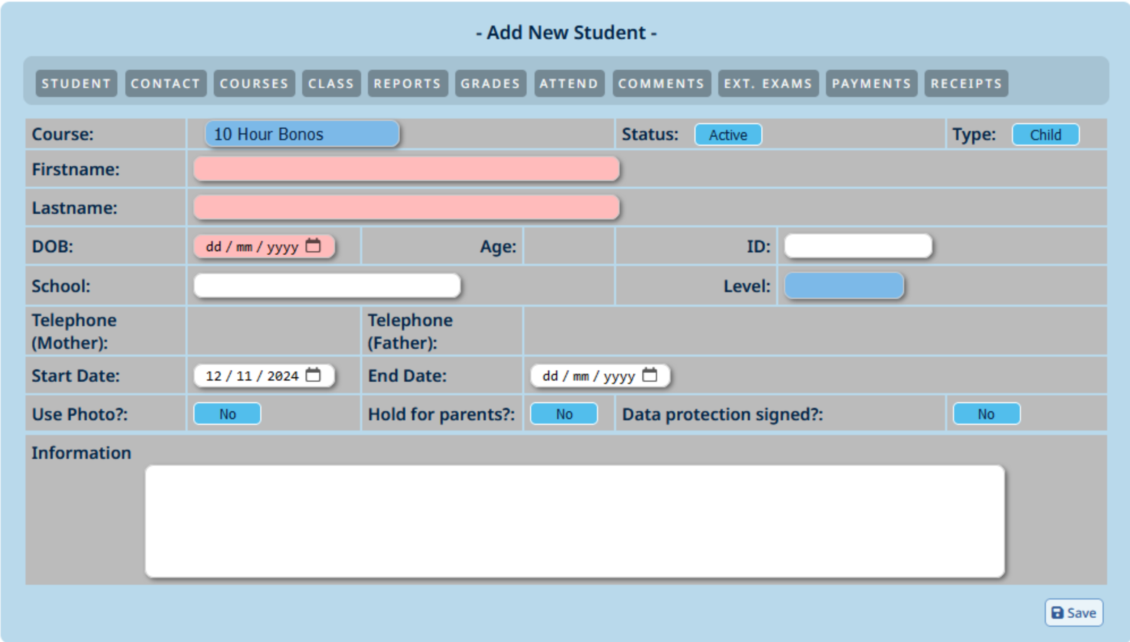
Recording Exam/Certificate Results

To record the results of an exam in the students record:

- Go to **Students**->**Student information**->*{student name}*
- Click on the **Ext. Exams** Tab
- Click on the name of the exam you want to record the results of
- In the **Results** text field type in the details of the results
- Click on **Pass/Fail** to indicate if they successfully passed the exam
- Click the **[Save]** button

Student Information

The core of the AdminForSchools system is the Student information functionality. All the Information about a student is accessible via a set of single click tabs from one location.



- **Student** Details
- **Contact** Details
- **Courses** they are enrolled on
- **Classes** they are enrolled in
- Historical term **Reports** for their entire history with you
- Grades**/Evaluations** they have done this year
- **Attendance** record
- **Comments** or concerns raised by Teachers or staff
- **External Exams** / Certificates results
- **Payments** for Classes
- **Receipts** issued for Payments

Searching for Specific Students

In the top right of the student page are three Search icons:

This icon allows you to find a student by selecting either the first letter or the First name or Last name. You can also type in their AdminForSchools Student ID number if you know it. In addition, you can search specifically for student details of students who are no longer enrolled.

This icon shows the details of any students who are siblings of the currently selected student

This icon allows you to search the contacts information based on part of the contacts name, state ID, telephone number or email address.

Setting a reminder

The information text can also be used to record reminders that you have to do something concerning this student. Once set a bell icon appears next to the students name in the student search lists, and the name is displayed in a list on the home page

To set a reminder, click on the [xxx bell] icon to the right of the information box. The information box will turn green to show the reminder has been set.

To clear a reminder, click on the [xxxx slash] icon

Student Details

Code	A unique code number for this student within your school
Status	Indicates if the student is currently enrolled (Active) at your school. If you make a student inactive the system will prompt you for a reason why they left, so you can do some analysis (see Leave Reasons Report). The list of reasons is totally customisable. See Data Lists
Type	Is the Student legally a Child or an Adult
Firstname	The student's First name(s)
Lastname	The student's surname(s)
DOB	Date of Birth
Age	Students age, automatically calculated from the DOB
ID	The students state Identity number if they have one.
School	The school the student attends if applicable
Level	The level the student is studying at, at their school. This is customisable. See Data Lists to setup the levels appropriate to you.
Telephone (Mother)	Shown for non-adult students
Telephone (Father)	Shown for non-adult students
Telephone	Shown for adult students
Mobile	Shown for adult students
Start Date	The date they first enrolled at your school
End Date	The date they left your school
Use Photo?	They (or their parents) have given permission for you to take their photograph
Hold for parents?	Indicates if they are to be held on site to wait for their parents arrival

Data protection signed?	Has a data protection form been signed that covers this student. Note Parents with multiple students at your school only need to sign a form once for all their children.
Information	General information about the student that your administration staff wish to record.

Contact Details

The AdminForSchools system can record three different types of Contact information, depending on the students age and relationship with your school

- **Parents**

  This contact information is for students who are not adults and have legally responsible parents

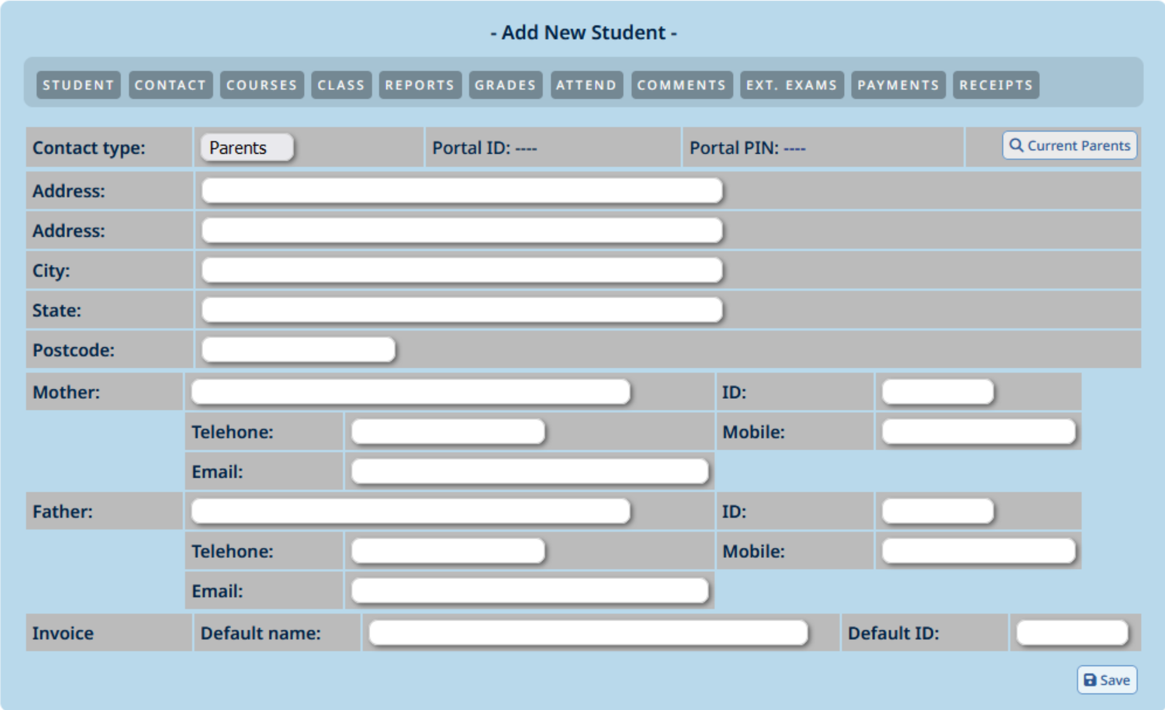
- **Self**

  This contact information is for adult students who have a direct relationship with your school

- **Corporate**

  This contact information is for adult students who have an in-direct relationship with your school. For example you may have a contract with a third party organisation to teach their employees/members. In this case your primary relationship is with the organisation not the students.

Parent Contact Information



Contact Type:	Parents
Portal ID:	The ID for these parents to use to access the parent portal
Portal PIN:	The PIN number the parents need to access Parent Portal. The PIN number can be changed by clicking on it
Address (x2)	Two lines to record the parents street address
City	The city the parents live in
State	The State or Region the parents live in
PostCode	The post code of the parents
Mother	The mothers name **ID** The mothers national ID number **Telephone** The mothers telephone number * **Mobile** The mothers mobile phone number * **Email** The mothers email address
Father	The fathers name **ID** The fathers national ID number **Telephone** The fathers telephone number * **Mobile** The fathers mobile phone number *

	Email	The fathers email address
Invoice	**Default name**	The name to appear on printed invoices for this student
	Default	The national/tax ID number to appear on printed invoices for this student

**Telephone number fields are restricted to the characters 0-9, space, +, and x*

Siblings

Linking Parents to Multiple Children

The way the AdminForSchools system knows the siblings or related students is by telling it they have the same set of parents.

- For the first child create the contact record normally by filing in the appropriate fields and clicking the [Save] button

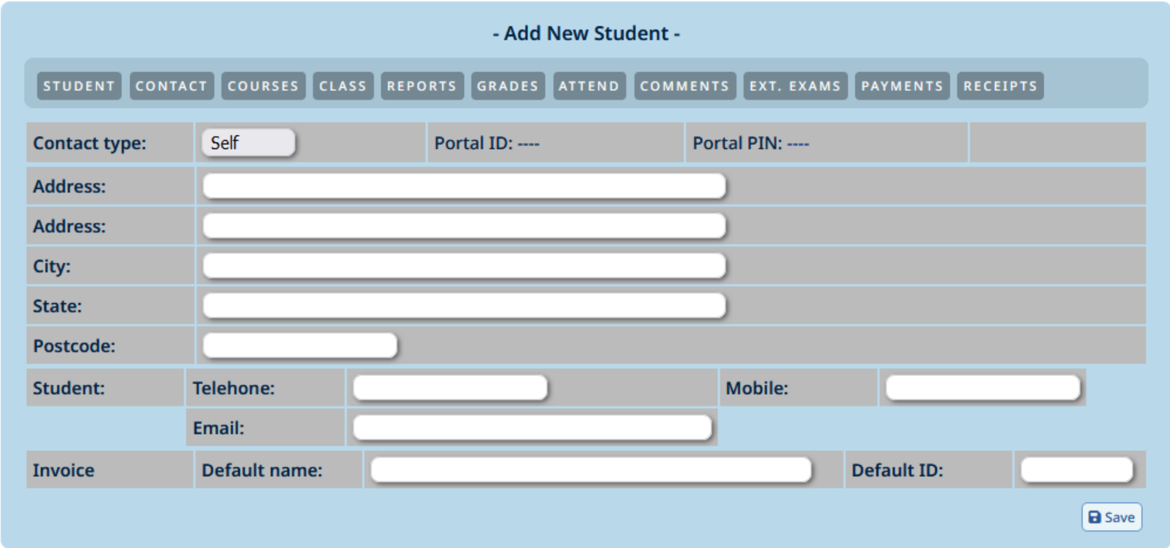
For the second and subsequent children:

- Instead on typing in the Parent information again
- Click on the [Current parents] / [Change Parents] button in the top right of the page
- Select either the mothers name or fathers name from the list
- Click the [Select] Button
- The system will now populate the fields with the previously stored information for the selected parents (if it is the wrong parents click the [Change]/[Current] button again.
- If the information is correct click the [Save] button

Finding a student's siblings

- In the Student information page click on the  icon near the top right

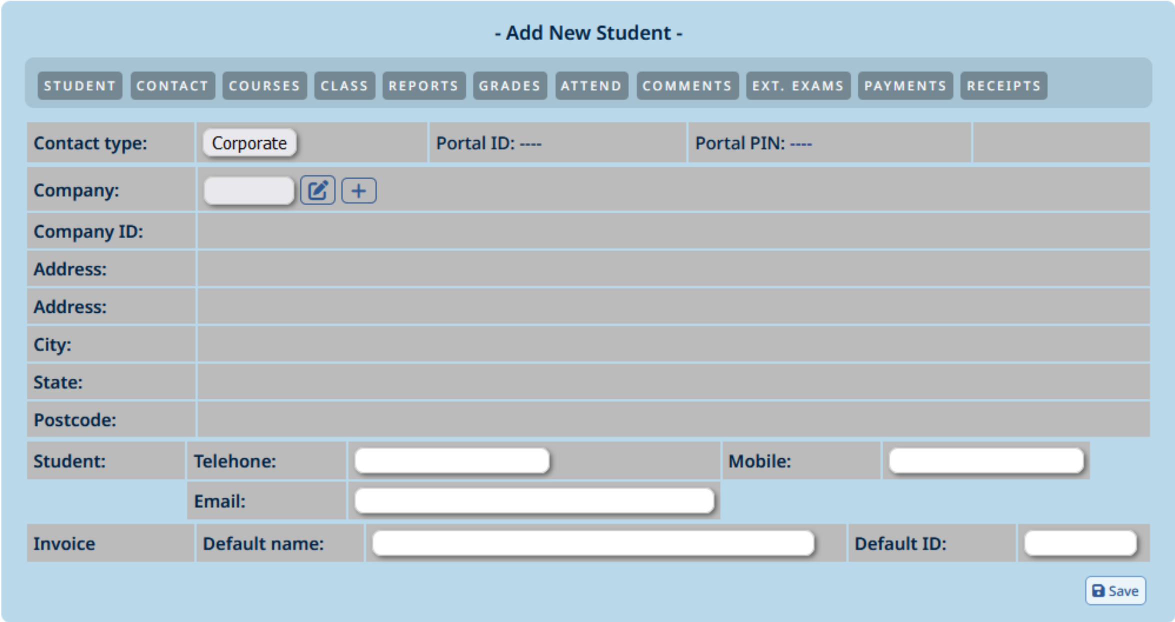
Self Contact Information



Contact type	Self
Portal ID	The ID for the student to use to access the parent portal
Portal PIN	The PIN number the student needs to access Parent Portal. The PIN number can be changed by clicking on it
Address (x2)	Two lines to record the students street address
City	The city the student lives in
State	The State or Region the student lives in
Postcode	The post code of the student
Student	**Telephone** The students telephone number * **Mobile** The students mobile phone number * **Email** The students email address
Invoice	**Default name** The name to appear on printed invoices for this student **Default** The national/tax ID number to appear on printed invoices for this student

**Telephone number fields are restricted to the characters 0-9, space, +, and x*

Corporate Student Contact Information



Contact type	Corporate
Portal ID	The ID for the student to use to access the parent portal
Portal PIN	The PIN number the student needs to access Parent Portal. The PIN number can be changed by clicking on it
Company	The name of the company/organisation the student works for (see below)
Company ID:	Automatically completed with the company information
Address (x2)	Automatically completed with the company information
City	Automatically completed with the company information
State	Automatically completed with the company information
Postcode	Automatically completed with the company information
Student	**Telephone** The students telephone number **Mobile** The students mobile number * **Email** The students email address *
Invoice	**Default name** The name to appear on printed invoices for this company **Default ID** The tax iD to appear on printed invoices for this company

**Telephone number fields are restricted to the characters 0-9, space, +, and x*

Company client Information

To add or edit the details for new corporate clients click on the [edit] or [+] icons in the company field of a student with type Corporate.

Company	The company's full name
Company ID:	The company's Tax ID number
Address(x2)	Two lines for the company street address
City	The city the company operates from
State	The State/Region the company operates from
Postcode	The Postcode the company

Courses

Here you can tell the system which courses a student is enrolled in.

Enrolling a student on a course

From the list of courses click the [+] to the right of the course name

Note if any registration fees are due, they are not allocated to the students record until you add the student to a class within the course.

Removing a student from a course

From the list of courses click the [delete] to the right of the course name

Note: Removing a student from a course will also automatically remove them from any associated classes.

Removing a student from all courses will not remove them as an active student at your school. If the student has left the school you should change their **status** to **Left** on the Student Details Tab

Classes

Here you can see all the courses and classes the student is part of.

Adding a student to a class

- Click on the [+] to the right of the course name
- Select the class from the list
- Click the [save] button

Removing a student from a class

- Click on the [delete] icon to the right of the class you want to take the student out of. (**Important** see below about moving students between classes)

Moving a student between classes

Important: If you need to move a student between classes it is important that you use the move icon [move] rather than removing a student from the original class, and then adding them to the new class. If you were to do this the payment information associated with the original class will not be correctly moved with the student

- To move the student click the ⇄ to the right of the class they are leaving
- Select the new class from the list
- Click the **[Save]** button

Reports

On this tab you can see all of the students past and current end of term reports.

Viewing a report

- Click on the title of the report

Printing a report

- Click on the icon to the right of the report you want to print

Grades/Evaluations

The Grades tab allows you to see the results of all the evaluations this selected student has done in the current academic year.

Printing an Evaluations summary

- Click the icon to get a summary of all of the student's evaluations

Attendance

The attendance tab shows the students attendance in all their enrolled classes for the current academic year

Printing the attendance record

- Click the icon to get a summary of the student's attendance

Comments

The AdminForSchools system contains a facility for the teacher to make notes about individual students either for their own use or to let the administration staff know they need to take a specific action, also the Administration staff can leave student specific notes about the student for the teachers.

The comments tab shows the complete history of comments and actions for the selected student.

Comments can have one of four status indicators shown by a coloured dot next to the entry

- [red] Action required
- [yellow] Being actioned
- [Green] Issue resolved and closed
- [no indictor] No action required, for information only

Creating a comment

- Click on + icon
- Set the required status by clicking the [] icon
- Write the comment in the Information field
- Click the **[Save]** button

Updating/responding to a comment

- Click on the [xxx] icon next to the comment you want to update
- Set the required status by clicking the [xxx] icon
- Write the update message in the Information field

- Click the **[Save]** button

Printing a student's Comment History

- Click the icon to get a summary of the student's comments

External Exams / Certificates

This tab shows all the external exams/Certificates the student has been registered for along with any results obtained. In addition it show the status of any money that they may need to pay for those exams.

Registering a student for an Exam/Certificate

To register a student for an exam/certificate Click on the icon

Exam/Certificate	Select the exam/certificate the student is going to do (See External Exams to create new exams in the system)
Exam Date	Enter the date the exam will take place or the certificate will be issued
Fee to Pay?	If the is a fee to be paid by the student for this exam select Yes. The current fee for an exam is set in the External Exams manager

- Click the **[Save]** button to save the data

Accepting payment for an Exam

The system shows the total amount of outstanding payments for the exams the student is registered for. They don't need to make a full payment at once if not required.

- Click on the icon

Student	The students name
Total	The total amount due for all the registered exams in the current academic year
Outstanding	The amount the student still owes for the exams
Payment	By default this show the outstanding amount, however you can change it to a smaller amount if they are making a part payment
***Payment Type**	The type of payment the student is making
***Tax Rate**	The sales tax percentage to apply to the payment
***Finance Code**	The finance code you want to record the payment under
Concept	The description you want to attach to the payment that will appear on receipts etc

- Click the **[Save]** button to save your payment

**These fields are only available if the Finance Module is active*

Recording Exam/Certificate results
Click on the name of the exam/certificate

Result	The details of the students results
Pass/Fail	Indicate if the student Passed or failed the Exam. Selecting the empty option will clear the result information

Click the [Save] Button to save your data

Deleting an Exam/certificate
If you want to delete an exam/certificate from the students record

- Click on the name of the exam
- Click on the **[Delete]** button

Important: Deleting an exam will not remove the record of any payments made, but will remove the amount owed for the exam from the total so the student will retain the credit for the payments to apply against other exams.

Changing the Date of an Exam/Certificate
If you need to change the date of an exam click on the date associated with the exam and enter the new date. Note you can only change the date if no results have been recorded

Payments for Classes
This tab allows you to see the history of Payments the student has made for all of their currently enrolled classes.

If the student is currently enrolled in more than one class you can see the details for each of their classes by selecting the appropriate class from the **Class:** drop down.

The details shown for each of the four course payment types are different:

1 Scheduled payment Courses
Here the information is presented as a table showing all of the anticipated payments, when the due date is for each payment, the amount of the payment, and whether the student has made that payment.

To make a scheduled payment
- Click the $ icon next to the payment the student wants to make

***Payment By**	The type of payment the student made. Cash, Card etc
Amount	The amount the student paid. By default this is the full amount the student is expected to pay. Note if there is an active voucher then the system will automatically apply any relevant discount. See Voucher Management
Paid on	The date the student actually made the payment
Active Voucher	This only appears if the student has a voucher that is applicable to the course

**This option is only available if the Finance module is active*

- Click the **[Pay]** button to record the payment

To Print a receipt for payments

If you need to print a receipt for the student's payment

- Tick the box(es) next to the Payment(s) you want to include in the receipt (you can select more than one payment).
- Click the icon in the bottom right of the table

To change the amount, type or date of a scheduled payment

- Click on the payment amount of the payment you want to change
- Change the appropriate payment detail
- Click on the **[Update]** button

2 Full Fee

To make a payment

- Click the $ icon

Class date	The date the payment is being (or was) made.
Amount	The amount the student is paying. The default is the full amount outstanding. But the student can make smaller part payments if necessary.
Payment method	The type of payment (card, cash etc)

- Click the **[Pay]** button to record the payment

To print a statement of payments and account balance

- Click on the icon at the top of the table

To print a receipt for a payment

- Select the tick box(es) to the right of the payment(s) you want to include on the receipt
- Click the icon at the bottom of the table

3 Per Class

To make a payment

- Click the $ icon

Class date	The date of the class the payment is being made for.
Amount	The amount the student is paying. The default is the full amount outstanding. But the student can make smaller part payments if necessary.
Payment method	The type of payment (card, cash etc)

- Click the **[Pay]** button to record the payment

To print a statement of payments and account balance

- Click on the icon at the top of the table

To print a receipt for a payment

- Select the tick box(es) to the right of the payment(s) you want to include on the receipt
- Click the icon at the bottom of the table

4 Per Hour

To make a payment

- Click the icon

Class date	The date of the class the payment is being made for.
Amount	The amount the student is paying. The default is the full amount outstanding. But the student can make smaller part payments if necessary.
Payment method	The type of payment (card, cash etc)

- Click the **[Pay]** button to record the payment

To add additional hours for the student

- Click the icon

Hours to add	The number of hours you want to add to this students account. If you are offering an initial 1 hour trial lesson this should be 1
Cost per hour	The cost per hour of the hours you are adding. If you are adding a single trial lesson this amount might be different to the default cost.

- Click the **[Save]** button to add the hours

To alter the amount of a payment or amount owed

- Click on the amount you wish to change
- Change the payment amount
- Click the **[Save]** or **[Pay]** button to update the value

To print a statement of payments and account balance

- Click on the icon at the top of the table

To print a receipt for a payment

- Select the tick box(es) to the right of the payment(s) you want to include on the receipt
- Click the icon at the bottom of the table

Using Vouchers

The vouchers functionality is only available if the finance module is active. See also section Vouchers

Not all course types can have vouchers applied to them, and not all voucher types can apply to all course types. (See Voucher Types for an explanation about voucher types)

To sell or allocate a voucher to a student

- In the payments tab click on the icon next the academic year
- Select the voucher you wish to apply to this student
- Click on the icon

- Click on the **[Pay]** button

If the voucher is free (has no cost to the student) you have to record a payment of zero. The zero payment isn't recorded in your Financial transactions, but the voucher is allocated to the student.

Automatic voucher use for payments

Any active vouchers for a student are automatically applied to student payments for the appropriate course. If the student has more than one voucher active, each one is used in the order they were allocated to a student until the coupons on that voucher are exhausted. Only one voucher can apply to any given payment.

Receipts

The receipts tab shows you all the receipts that the system has generated for the student.

Re-printing a receipt

To re-print a receipt with the original date etc, click on the icon to the right of the receipt you wish to re-print.

Recording student reservations for the next academic year

The AdminForSchools system can record requests from students to reserve a place for them in the next academic year. At the time of the reservation you will probably not know the details of the classes for the next academic year, the system simply holds their reservation in a list, and then at the end of the academic year when you know the class details you can run a function to process the reservations. See: Year End Processing Reservations

When a student wants to make a reservation

- On the payment Tab of the student's information page click the icon
- First Click on tick box under **Reserved**. This records the reservation has been made
- If they are paying a reservation fee
- Make sure the amount is correct (by default the current registration fee)
- The method of the payment is correct
- Click the icon to record the payment
- If they want a receipt for the payment click the icon

When a student wants to cancel a reservation

- On the payment Tab of the student's information page click the icon
  And the reservation details will be shown
- Click on the tick box under **Reserved** to remove the tick. This removes the reservation from the list

Note if you have the Finance module and you want to refund the reservation payment go to **Finance**->**Transactions**->**Refunds** to issue the refund.

Vouchers

The option to implement and use vouchers is part of the Finance Module and only available if this is enabled.

The AdminForSchools system supports the use of four different voucher types. Not not all voucher types are available for all course types. The details are below.

There are two components to a voucher. The voucher itself and a fixed number of coupons on the voucher. Once a student has been sold or given a voucher, the system will automatically apply it to the selected course only for the number of coupons that are on the voucher.

Vouchers can be a chargeable item (i.e. the student pays for it) or they can be free with a zero charge.

While students can possibly have multiple active vouchers, the system only allows them to be used one at a time (i.e. only one voucher can apply to a payment). If a student has multiple active vouchers they are used in the order they were bought/allocated.

Multi-Site users: Vouchers are specific to each site, so if you want to run the same promotion at different sites you will need to create the voucher separately at each site.

Voucher Types

1. **Pre-Pay**

   These are vouchers where the student has pre-paid for a fixed number of classes. These could also be used if you were using a promotion where you were giving a number of free classes.

2. **% Discount**

   These vouchers can be used where you want to give a fixed % discount to a student for a fixed number of classes. For example, a promotion where the first 3 classes have a 50% discount.

3. **Free course**

   This is a single coupon voucher that allows you give a complete free course (one academic year) to a student. You could also use them if you wanted to charge a special reduced rate for a course. For example if you had a promotion that said the first 10 people to sign up for a course get it for half price. In this example you would charge the student the half price fee for the voucher, and the actual course payments would be zero

4. **Free Class**

   This is a voucher that gives a student a fixed number of classes for free.

Creating a new voucher

- Go to **Finance**->**Voucher Management**
- Click the + icon

Voucher name	A Unique name for this voucher at this site
Voucher type	The type of voucher this is going to be

Expiry Date	The date this voucher expires. After this date the voucher can not be issued or used. This date must be in the future. By default the system generates a date 6 months after today, but this can be changed.
Short Code	A unique short code for the voucher that you could use in your advertising. The system automatically generates this for you but you can change it if you want
Cost	The cost to the student for this voucher. If this is set to zero then the voucher is free. When allocating a voucher to a student you will still need to click the [Pay] button to complete the process but no charge will be made.
Tax Rate	The sales tax percentage to use for this voucher
Finance Code	The code in the finance system to record sales of the voucher to.
Coupons on Voucher	This is the number of times the student can use the voucher. **Note** for the Free Course voucher type this can only be 1.
Notify At:	The system can automatically notify admin staff on their home page when a student has used most of the coupons on their voucher. The number here is the point at which the number of remaining coupons should generate the message.

- Click the **[Save]** button to create the voucher

Activation: Applying a voucher to a course

Once created a voucher needs to be attached to a specific course to become active. If you want to run the same promotion for different courses, a voucher will need to be created for each course.

- Go to **Finance**->**Voucher Management**
- Click the ✕ icon to the right of the vouchers name
- Select the course to which the voucher is to be applied.

De-Activation: Stopping a promotion early

If you need to stop a promotion before the expiry date of the voucher

- Go to **Finance**->**Voucher Management**
- Click the course name to the right of the vouchers name (under Active?)
- Select the **– Not Active –** option

Selling/Allocating a voucher to a student

The process of selling a voucher to student is done via the **Payments** tab of the **students profile**, see here for more details: Using Vouchers

Voucher Usage Information

To get a summary of all current vouchers:

- Go to **Information**->**Vouchers**->**Voucher Status**

To get detailed information about voucher usage for a specific course:

- Go to **Information**->**Vouchers**->**Issued Vouchers by Course**
- Select the course you are interested in

To get a summary of issued vouchers that have recently expired because of the expiry date or the number coupons that have been used

- Go to **Information**->**Vouchers**->**Vouchers Expiring or Expired**
- Select the voucher you are interested in

Finance Module

The AdminForSchools system contains an optional simple finance system that allows you to record all the income and expenditure for your sites, and produce some customisable informative reports and extracts based on it.

By default all income from sales of classes, vouchers and external exams is automatically recorded for you. Using the Finance module you can also record details of any expenses you incur to get a complete picture of the Financial cashflow position of your business. Note the system isn't a fully fledged accounting package and cant produce balance sheets, profit and loss reports etc. But using the export options you can quite easy export the captured data into such a system.

Finance Settings

- Go to **Finance**->**Settings**

This is where you can set up the basic financial related information about your business such and the full business name, tax code etc.

Company Name	The official name of your business
Company Tax code	The official tax code for your business as it needs to appear on receipts and invoices
Tax Code name	Different countries have different names or abbreviations for the name of their business tax codes. For example in the UK it might be **Reg. Number**, and in Spain it is **NIF** or if you are a sole trader it is **DNI**
Sales Tax Label	This is the official name or abbreviation for sales tax in your country/state. For example in the UK it would be **VAT**, in mainland Spain and Mexico it is **IVA**.
Tax included?	This controls how the system generates invoices and receipts based on the cost you tell it to charge for classes. **Tax Included = Yes** If you charge **50** for a class and the sales tax to apply is **10%** then the cost to the student will show on the invoice as **45.45+4.45=50** **Tax Included = No** If you charge **50** for a class and the sales tax to apply is **10%** then the cost to the student will show on the invoice as **50+5=55** **Note** this is a global setting for the entire system.
Default Tax Rate:	The is the default sales tax rate to apply to all fees in the system. You can set up multiple different tax rates (see below). The system is supplied with a single 0% entry but once you have created additional rates you can change this
Default Payment type	This is the default payment type to display when accepting payments for classes etc. It should be the one that your students use the most. The system is supplied with three types but you can create others. See below
Paper Layout	This is the uploaded pre-printed stationary to use for the printing of invoices and receipts. And can be different from that used for

	Student reports etc. See Paper layouts section for details on uploading blank pre-printed pages into the system
Receipt footer	This is some optional text that you can have appear at the bottom of every printed invoice and receipt. It could be information about your policy on refunds, or data privacy etc.

- Click the **[Save]** button to save any changes

Creating Multiple Sales Tax rates

Many Countries/States have tax rules that say that different sales tax rates apply to different products and services. For example, different rates might apply to children's classes than to adult classes, or Exam fees might have a different rate to any classes.

The AdminForSchools system can easily support this and allows you to automatically apply the different rates based on the service or course.

- Go to **Finance**->**Settings**
- Click on the [+] icon to the right of the Default Tax rate
- Enter a label for the tax rate which you be as simple as **7%** or **Education 2%**
- Enter the actual numeric percentage to apply (ie 7.0 in the above example)
- Click the **[Save]** button

Accounts (Payment Types)

The AdminForSchools system treats the various different payment types like a type of bank account with Credits and Debits. The default system is supplied with three payment types called **Bank**, **Card**, and **Cash**. You can easily create others depending on your needs. For example you may have multiple real bank accounts and want to accept transfers for corporate classes into one account and transfers for normal classes into another. Or you might want to create a payment type called Free for recording the value of any free classes you may be giving.

Creating a Payment type

To create a new payment type

- Go to **Finance**->**Accounts and Codes**
- Click on the [+] icon to the right of the **Accounts** line
- Type in a unique name for this Account/payment type
- If the Account is only to be used for making payments, for example it is a company credit card for expenses. Click the Make payments only box
- Click **[Save]** button to create the account

Finance Codes and groups

The finance module allows you easily record and identify income and expenses by recording them against specific codes. You can then produce customised reports based on those codes and groups.

A code Group is a logical collection of associated individual codes. For example You might want to create a code group called Classes, and then inside that group create individual codes for the income from each of your different course types. Or a code group called Office Expenses which contains individual codes for Electricity, Stationary, Furniture etc.

Important: The names of the groups and codes do not need to be unique, but every one must have a unique number. It is strongly recommended that you give the code groups unique names to prevent confusion when using them.

Creating a Finance Code Group

- Go to **Finance**->**Accounts and Codes**
- Click on the [+] icon to the right of the **Code Groups** line
- Enter a unique Group ID, the system will suggest one automatically, but can change it
- Enter a name for this code group
- Click **[Save]** to save the Group

Creating a Finance Code

- Go to **Finance**->**Accounts and Codes**
- Click on the [+] icon to the right of the **Finance Codes** line

In Code Group	Select the Finance code group this code is to belong to
Code ID	Enter a unique ID for the code
Code Name	Enter a name for the code. We suggest this is unique withing this group, but could be the same as a name in another group (ie. Payments)
Income/Expense	Indicate if this finance code is going to contain income or expenses

- Click **[Save]** to save the Code

User Defined Financial Reports

You can create your own financial reports based on selected Code Groups and or individual Finance codes and/or selected Accounts (Payment Types).

Creating a Financial report

- Go to **Finance**->**User Reports**
- Click on the [+] icon
- Enter a name for the report
- Click on the icon to create the empty report

  You can now choose to add all the Codes from a selected group or add individual codes from different groups (or a combination of the two)

Adding all the codes from a Group to a report

- Select the desired code group
- Click the icon to the right of the Code Groups line
  If there are any Codes you don't want to include you can remove them by clicking the icon to the right of the code.

Adding individual codes to a report

- Select the desired code group
- Select the desired financial code
- Click on the icon to the right of the code

By default, the transactions from all accounts that match the selected groups and codes are included in your report. If you want to restrict the information to a specific Account (Payment Type) you can select this on the **Accounts** line

Running a user defined financial report

- Go to **Finance**->**User Reports**
- Click on the name of the report you wish to run
- Select the range of dates you want the information for. By default, the system shows the data for the last month. If you change one of the dates the system will automatically re-run the report for the new time period
- If you want a printed copy of the report, click on the icon
- If you want to download and save a copy of the report, click on the icon

Transactions

This is the heart of the finance module where you search for and record individual financial transactions including the automatic ones generated by payments in in other parts of the system. You can also move money between accounts (reconciling the systems knowledge of transactions with statements from your bank), Issue refunds for payments and generate formal invoices to give to students or your financial advisors.

Expenses

On this tab you search for any expenses recorded for any given time period. By default the system shows the last month. You can also record any expenses you have made

Searching for expenses

- Go to **Finance**->**Transactions**->**Expenses**
- Select the date range you are interested in
- To see the details of an Expense, click on it

Recording an Expense

- Go to **Finance**->**Transactions**->**Expenses**
- Click on the icon

Date	The date the expense occurred, by default it is today
Account	The account the expense is to be recorded against (Cash, Bank etc)
Finance Group	The appropriate finance group for this expense
Finance code	The appropriate finance code for this expense. Note the system will only allow you to select Finance codes that are marked as expense codes
Concept	A description of the expense
Amount	The amount of the expense

- Click **[Save]** to save your data

Deleting an Expense

If you need to delete an expense:

- Go to **Finance**->**Transactions**->**Expenses**
- Select the date range you are interested in
- Click on the expense you want to delete
- Click the [**Delete**] button
- Click [**Yes**] to confirm the deletion

Income

On this tab you search for any income records in the system including all the automatically generated ones for any given time period. By default the system shows the last month. You can also record any additional one-off income receipts you have received.

Searching for Income records

- Go to **Finance**->**Transactions**->**Income**
- Select the date range you are interested in
- To see the details of the income record, click on it

Recording a manual Income receipt

- Go to **Finance**->**Transactions**->**Income**
- Click on the + icon
- Click [**Save**] to save your data

Date	The date the payment was received, by default it is today
Account	The account you received the payment in (Cash, Bank etc)
Finance Group	The Finance Group you want to record the payment against
Finance Code	The Finance Code you want to record the payment against. Note the system will only show codes that are marked as type payment
Student	Optional: If the payment is from a specific student, you can select them here
Concept	A description of the payment
Amount	The amount of the payment (see the note below about sales tax)
Tax	The amount of sales tax associate with the payment
Reference	Optional: If you have an external reference that you want to link the payment to you can enter the details here

Note: Sales Tax and Recording Income Receipts

If you have set the system to treat financial transactions as sales tax **included**, the amount you should enter here is the full amount of the payment including tax, and then select the appropriate sales tax percentage (i.e. the payment was **45.45** and there was a **10%** sales tax of **4.55** you should enter **50** here)

If you have set the system to treat financial transactions as sales tax **excluded**, the amount you should enter here is the amount of the payment excluding tax, and then select the appropriate sales tax percentage (i.e. the payment was **45.45** and there was a **10%** sales tax of **4.55** you should enter only **45.45** here)

Deleting an income record

Note: The system records automatically generated income records internally in two places. Once in the Finance module, and once in a location associated with the automatic payment type. For example a payment for a schedule class will be recorded as a general financial transaction and as a record of a payment for a specific payment (i.e. the registration payment). When you delete a income payment in the Financial module both records are deleted.

- Go to **Finance**->**Transactions**->**Income**
- Select the date range you are interested in
- Click on the income record you want to delete
- Click the [**Delete**] button
- Click [**Yes**] to confirm the deletion

Refunds

In the event that you need to issue a student with a refund for a full or part payment you can do it from the refunds tab. Note a refund is purely a financial transaction and does not appear in a student's record of payments.

Searching for previous Refunds

- Go to **Finance**->**Transactions**->**Refunds**
- Select the date range you are interested in
- To see the details of the refund, click on it

Creating a refund

- Go to **Finance**->**Transactions**->**Refunds**
- Click on the + icon

Date	The date the refund was issues, by default this is today
Account	The account the refund is to be taken from
Finance Group	The Finance Group you want to allocate the refund to
Finance Code	The finance code you want to allocate the refund to. Note because refunds are an expense, only finance codes of type expense are shown
Student	If you want to allocate the refund to a particular student select them here
Concept	A description of the reason for the refund
Amount	The total amount of the refund.

- Click [Save] to save the data

Printing a Receipt/Invoice for a refund

- Go to **Finance**->**Transactions**->**Refunds**
- Select the date range you are interested in
- Click on the refund you want the receipt for
- Click on the [**Invoice**] button
- Ensure the Client name and ID are correct (the person/entity you are issuing the refund to)
- Click the [**Print**] button

Deleting a Refund

If you need to delete a previously issued refund:

- Go to **Finance**->**Transactions**->**Refunds**
- Select the date range you are interested in
- Click on the refund you want to delete
- Click the [**Delete**] button
- Click [**Yes**] to confirm the deletion

Account Statements and Balances

If you need to see the current balance of an account, or produce a statement of the transactions to/from that account this can be done at the accounts tab.

Note if you need to create a new account/Payment type go to **Finance**->**Accounts and Codes**

Viewing the current balance of all your accounts

- Go to **Finance**->**Transactions**->**Accounts**

Viewing the transactions to/from and Account

- Go to **Finance**->**Transactions**->**Accounts**
- Click on the name of the account you are interested in
- Select the date range you want to view. By default the system shows the last month of transactions
- To see the details of a particular transaction, click on the appropriate concept text
- To print a statement of your selected date range, click on the icon
- To export to a file the selected transactions click on the icon

Correcting the balance of an account

If you need to correct the balance of an account because it doesn't match the records from your bank, but don't want to do this by moving money from another account follow these steps.

Important: Because this function is open to abuse it is only available to system super users, and not regular staff.

- Go to **Finance**->**Transactions**->**Accounts**
- Click on the name of the account you are interested in
- Click on the + icon
- Enter the date in the financial record you want to adjustment to happen on (by default today)
- Enter the corrected (new) balance you want the account to show at this date.
- Click the [**Save**] button

Transferring money between accounts

This tab allows you see all the movements of money between accounts and to make those transfers. The most common use for this would be for example if you receive periodic payments from a card services provider, rather than the payments in real-time. When you receive the payment from the provider you can move the money from the internal AdminForSchools card account to the appropriate bank account so the real word accounts and the AdminForSchools accounts are correctly reconciled.

Searching for money movement records

- Go to **Finance**->**Transactions**->**Transfers**
- Select the date range you are interested in
- To see the details of the transfer record, click on it
  Note the amount shown on the details is always negative as it is shown as having been taken from the source account. The destination account will show it as a positive amount

Making a money movement between accounts

- Go to **Finance**->**Transactions**->**Transfers**
- Click on the [+] icon

Date	The date on which the transfer took place, default is today
From Account	The account you want to take the money from
To Account	The account you want to credit the money to
Concept	A description of the transfer
Amount	The full amount to transfer

- Click the [**Save**] button to save your transfer

Searching for a transactions

The AdminForSchools finance system has a powerful built in search function that rather than looking for just a single transaction can return a list of all transactions with a given common parameter

- Go to **Finance**->**Transactions**->**Search**

Between	The dates you want to search between
Course	Select a course to see all the payments from that course
Student	Select a student to see all the associated transactions for the student
Account	Select an account to see all the transactions for that account
Finance Group	Select a finance group to see all the transactions for that group
Finance Code	Select a finance code to see all the transactions for that code

You don't have to supply information for all the fields, only the one(s) you are interested in, and you can combine fields to narrow down the search.

For Example, if you wanted to find the **Card** payments that **Fred Smith** made between **Jan 1 2023 and March 31 "2023** you would enter **01/01/2023** and **31/03/2023** in the date range, Select **Fred Smith** from the student list, and the account **Card** from the accounts list. Then click the [**Search**] button

Invoices

The AdminForSchools system can generate two types of printed receipt to give to students in response to you receiving a payment. The day-to-day receipts that simply acknowledge a payment was made, and a more formal printed Invoice that you might want to give students or organisations for tax purposes.

In some locations when you are preparing you accounts for review by your financial advisor, they want to see copies of invoices for all the payments you have received even if you didn't give the students a physical copy. The AdminForSchools system can bulk create these for you on a monthly basis if you need them.

Creating an invoice for a specific payment

- Go to **Finance**->**Transactions**->**Income**
- Select the date range you are interested in
- Click on the transaction/payment you want the invoice for
- Ensure the **client name*** is correct. In the case of a payment for a child student this should be the name of a parent.
- Ensure the Client ID is correct if required. This would normally be the Tax ID of the person in the field above
- Click on the **[Print]** button

Client name

A default client name and ID can be set on the Contact Tab of the student's information pages

Creating bulk Invoices for accounting purposes

- Go to **Finance**->**Transactions**->**Invoices**
- Click on the [xx] icon
- Select the month you want to create the invoices for
- Select the Accounts and Courses you want to include (by default all are selected)
- Click on the **[Create]** button

Re-Printing an Invoice

In the event that you need to re-print a previously created invoice

- Go to **Finance**->**Transactions**->**Invoices**
- Find the invoice you want to print
- Click on the icon to the right of the concept text
- If you want to check it is the correct invoice, click on the concept text to display the details then click on the **[Print]** button

Exporting Financial Information

You may need to periodically export a list of all the transactions and or invoices for a specific period of time.

Exporting Transactions

- Go to **Finance**->**Transactions**->**Accounts**
- Click on the icon
- Select the Accounts you want to include in the Exported file (by default all are selected)
- Select the date range of transactions to be included
- Click on the icon

Exporting Invoices

- Go to **Finance**->**Transactions**->**Invoices**

- Select the date range you want to export the invoices for
- Click on the icon

Information Reports

The AdminForSchools system can generate a number of informational reports both on screen and printed to help you manage your centre day-to-day. Most of these are found on the **Information** menu item.

Missing Payments

This sections shows all students who have outstanding payments for classes

Missing Payments for Scheduled Courses

This page shows students who have outstanding payments for the selected scheduled payment. You can:

- Click on **their name** to make the payment
- Click the icon to print the list of names
- Click the icon to download the list along with the email addresses of the parents
- Click the [xx] icon to generate a list of email addresses to cut and paste into the BCC field of your email software

Missing Payments for Per-Class Courses

This page shows students who have outstanding payments for the classes of type Per-Class.

It shows the students name, the class, the date of the class and the attendance status for that class

- **P** = Present
- **C** = Cancelled
- **A** = Absent

Cancelled and Absent are only included if you have set these as requiring a payment in the register settings (see Register Settings)

On the list of students, you can:

- Click the **students name** to see their contact information
- Click the **class name** to make a payment
- Click the **status letter** (P/C/A) to remove them from the list

Missing Payments for Per-Hour courses

This list shows students who have outstanding payments for classes of type Per-Hour.

On the list of students, you can:

- Click the **students name** to see their contact information
- Click the **balance amount** to make a payment
- Click the icon to remove their name from the list

Students – General Information

This section has a range of general reports about the students

- ### Students with no class

  These are students who are active in the system, but are not assigned to a class. You can allocate them to a class, or make them inactive by clicking o n their name

- Students leaving reasons
  This is a printed report showing students who have been made inactive in the current academic year and the reason you recorded they left. The leaving reasons available can be customised. See Data Lists

- Students Photo Permission
  This is a list of students sorted by course and class that either do or don't have the photo permission indictor set on their profile. You can print out a list of students in a class to give to teachers.

- Students Hold for Parents
  This is a list of students sorted by course and class that have the hold for parents indictor set on their profile. You can print out a list of students in a class to give to teachers.

- Students with no Data Protection form
  Most countries/states require students or their parents to complete a data protection form. You can indicate that student has one of these on their profile. This report shows all the students who have not returned a signed form.

- Reservations for the next Academic year
  This is a list of students who have reserved a place in a class for the next academic year, it also indicates if they paid a reservation fee

External Exams

This section produces some reports about students performance in external exams

- Pass/Fail Summary
  This is a printed report showing a list of students who took external exams in the current academic year and if they passed or failed

- Student Results
  This report allows you to select any of the academic years the system knows about, and see which students took an external exam that year, what their results were, and if they passed or failed.

Vouchers

This section shows some general information about any vouchers you have created and are issuing

Voucher Status

A printed report showing the details of all active vouchers and the number of each sold/issued

Voucher Usage

An on-screen report showing, by course, the students that have bought a voucher and the coupons they have used.

- Select the course
- To see the actual usage by the student, click on their name

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Vouchers Expiring soon or expired

An on screen report that show students who have used all the coupons on bought vouchers, or if the notification was set in the voucher definition (see: Creating a new voucher), students with only a few coupons remaining.

Course Registration Payments

An on-screen report showing for courses that have a registration fee, the month that individual students made the payment.

- Select the course
- Select the month you are interested in
- Indicate if the report is to contain currently active or inactive students

Per-Hour Class Summary

An on-screen report showing all the students registered for a select per-hour type course and the total number of hours they have used and hours they have purchased. Students shown in red have reached or exceeded the number of hours they have purchased.

- Clicking on a student name will show their contact information
- Clicking on the hours used will show the class dates that they had classes and the length of the class.
- Clicking on the [xxx] icon will remove their name from the displayed list

Staff Login History

An on-screen report showing all staff login attempts to the system. By default the list is sorted by time starting with the most recent. A red warning symbol next to a staff member's entry indicates the login was un-successful.

Sorting the list

- To sort the list by time click on the **Time** heading
- To sort the list by user name click on the **User** heading
- To sort the list showing un-successful attempts first click the **Login Ok** heading

Finding the entries for a specific user

- Click the `[xxx] icon next to the User heading
- Select the staff member
- Click the [xxx] icon

Trimming the List

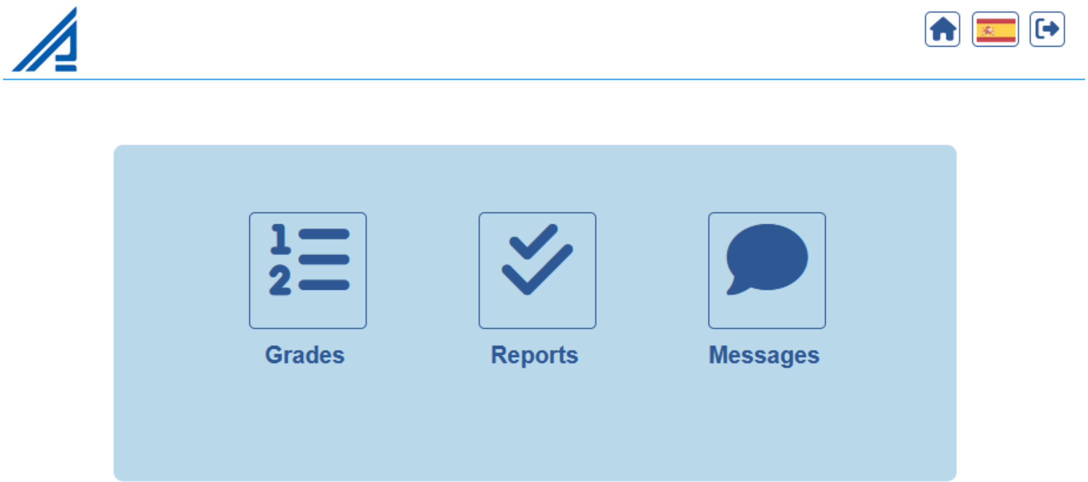
Over time, if you have a lot of staff the list can get quite long. If you want to remove some of the older entries:

- Click on the [xxx] icon
- Select the time period (older than ...) that you want to remove.

Parent Portal

The AdminForSchools systems has a built in parent portal branded with your logo that parents can log into to see their children's progress. The portal can be found at **https//***[yoursite]***.adminforschools.net**

Every parent has their own unique login ID and PIN number. To make it easier for you to distribute these to parents they are included in the automatic emails sent to parents with the student term reports.



Parent User Code and PIN

The user code and PIN for a parent can be found on the contacts tab of the students information page.

- Go to Students->Student Information
- Select the student
- Click on the [**Contact**] tab

The details are shown at the top in the fields **Portal ID** and **Portal PIN**

Changing a parent's PIN number

If for any reason you need to change the login details for a parent, you can ask the system to create them a new PIN number

- Go to Students->Student Information
- Select the student
- Click on the [**Contact**] tab
- Click on the **4 digit PIN number** in the Portal PIN field
- Click on [**Yes**] to create the new PIN

The Portal PIN field will now be updated with the new PIN

Exporting Parent Login Details for a Mail Merge

If you want to send a customised letter using a mail merge process (in Microsoft Word for example) you can obtain a data file containing the parent names, email addresses, Portal ID and Portal PIN.

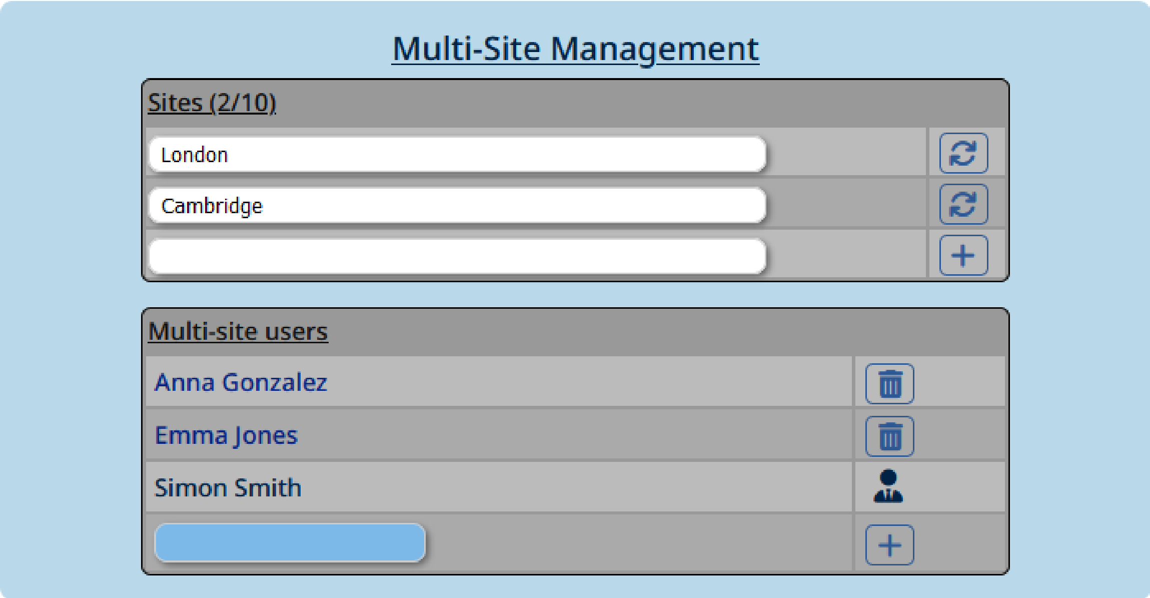
You can get the list for a whole course, or all the students being taught by a particular teacher on a course, or just the students in a specific class

- Go to **Email**
- Select the **Course**
- Select the **Teacher** (optional)
- Select the **Class** (optional)
- Click on the [**Get Addresses**] button
- Click on the icon to download the file

Multiple Site/Centre Option

The AdminForSchools system can easily support originations that have centres in more that one location. This is the Multi-Site option. When the system is first turned on for you your initial site will be already setup in the system and its name will show at the top of the page next to your logo.

Important: In a situation where you have more than one centre, each centre will have its own courses, students and staff. Each centre effectively operates as a stand alone unit however the system does allow for the possibility of staff working in more than one location, so you don't need to enter their details separately for each site.



The top box shows you the list of sites that that have been created in the system, and the size of your licence (10 in this example).

The bottom box shows you the staff members that have been enabled to access data at more than their home site.

Accessing other sites

If you are a multi-site enabled user you will see a icon in the top right of the screen click on this to see a list of all the sites you can access. To access another site click on its name on the list. The xxxx icon shows the site you are currently attached to.

Super users indicated by a xxx icon on the multi-site users list automatically always have access to all sites

Adding a new centre

You can add as many centres as you want up to your licence limit. If you need to increase the size of your licence, please contact us.

- Go to **Settings** -> Site **Management**
- In the empty Field at the bottom of the top **Sites** box type in the name of the new site
- Click on the icon on the right to activate it

Enabling a staff member to work at multiple sites

By default staff member can only work at and access information at their home site. However you can easily enable a staff member to work at all or just some of your sites.

Important: A staff members system access permissions are the same at all the sites they are attached for. For example if they have Finance options available to them at their home site they will have the same options at all the other sites you attach them too.

- Go to **Settings** -> Site **Management**
- In the empty Field at the bottom of the top **Multi-Site Users** box type select the name of the staff member you want to activate
- Click on the + icon on the right to activate them
  Now they will have the option to access other sites, but initially only permission for their home site.
- Click on the staff members **name** on the list
- Select the sites you want them to access data for
  Important: if you de-select all sites for a user, their home site will always remain available to them. If you want to de-activate a login ID see: Deleting Staff Members

Removing Multi-site capability from a staff member

- Go to **Settings** -> Site **Management**
- In the bottom Multi-Site users box click on the icon next to their name

User Management

There are two parts to user management

1. Managing Login details and personal information
2. Controlling access permissions to site functionality

Managing Login details and Personal Information

User (staff) accounts exist in logical groups, four of which are supplied by default

1. **Management**
   Staff who have day to day management responsibly for a complete centre
2. **Senior Staff**
   Staff who are responsible for directly managing teachers and courses
3. **Administration**
   Your administration staff in a centre
4. **Teachers**
   The teachers in a centre

You can create others as the need arises. Each of the four pre-defined groups comes with a set of access permissions appropriate to that role.

There is a fifth type of user called a **super user**. This user has full un-restricted access to the system, and some additional functions that aren't available to other users (e.g. Access to the online payment for the system licence fee). Normally there will only be one super user and that is the person who originally contracted the AdminForSchools system. For your protection if you want to promote another member of staff to super user status, please contact us via the online support mechanism.

Adding a new staff member

- Go to **Management**->**Staff Management**
- Select the staff Group they will belong to. If you need to create a new staff group see below
- Click on the icon above the list of staff names

Firstname	The staff members first name
Lastname	(optional) The staff members last name(s)
Login ID	The username they will use to access the system. Usernames must be minimum of 6 characters, unique across all your sites and only contain the characters A-z 0-9 and . When they login the username is not case sensitive
Password	An initial password for them to use to login, it must be a minimum of 6 characters and contain a mix of upper and lower case letters and at least one number
Email	(optional) The staff members email address
Mobile	(optional) The staff members mobile phone number
ID/Passport	(optional) The staff members national ID or passport number
Weekly Hours	(optional) This is only used in the timetabling functions and should be the number of weekly contracted hours for this member of staff
Interface Language	The language the new staff member would prefer to use the system in.

Deleting a staff member

Note: You can only delete staff members if they are not currently teaching any classes. If you have a staff member who leaves and another one joining as a replacement. Enter the new staff members details first, then using the class management function assign the old staff members classes to the new one (or other teachers). Then you can delete the staff member who left.

- Go to **Management**->**Staff Management**
- Select the Staff Group the staff member belongs to
- Click on the staff member's name
- Click the [Delete] button (the delete button is only available if they are not currently teaching any classes)

Re-activating a deleted staff member

If you need to re-activate a deleted staff member

- Go to **Management**->**Staff Management**
- Click the [Active Staff] button on the top right to see the list of all the currently deleted staff members at this site
- Click on the selected staff members name
- Make sure the staff group name is correct (this may have changed from their original group)
- Click on the [Make Active] button

Note: By default, the staff member will be re-activated with the same login ID and password they had originally, but the staff group name will default to Administration.

Controlling Access Permissions

Access permission controls what parts of the AdminForSchools system users see and can use. If they don't have permission to use a function it doesn't appear on their menu.

The system is supplied with default sets of permissions that are appropriate to the different roles users may have.

1. **Manager** *(default for group Management)*
2. **Director of Studies** *(default for group Senior Teacher)*
3. **Administrator** *(default for Group Administration)*
4. **Teacher** *(default for group Teaching Staff)*

When a new user is created, they are automatically given the default permissions for the Staff group they have been assigned to. If they subsequently change groups you will need to re-assign their permissions.

Once a user has been assigned a default permission set you can tailor the actual permissions the user has to include or exclude any as appropriate.

Changing a User's Access Permissions

Important: A user's current permissions are applied when they log in. If you change the permissions of a user who is already logged in the change won't take effect until they log out and back in again.

Note: Only super users can change the permissions for themselves or other super users

- Go to Management->User Permissions
- Select the user you want to update

File Storage	Files Read Only	User has read only access to the shared file space
	Files Read/Write	User has full access to the shared file space
Finance	Transactions Limited Access	User can see and create Income, Expenses, Refunds. Can see Account Balances and Statements. Can create and see official Invoices
	Transactions Full Access	Full access to the Transactions option, with the exception of being able to correct an account balance.
	Accounts and Codes Edit	Can create and edit Accounts and Finance Codes
	Finance Settings	Access to the general Finance settings page
	Finance Reports	Can create and run custom financial reports
	Voucher Creation	Can create new vouchers
	Voucher Management	Can apply created vouchers to courses
Lesson Diaries	Write Lesson Diary	Can write a lesson diary only for the classes they are teaching
	View All Lesson Diaries	Can view lesson diaries for all classes at the centre.
Lesson Plans	Edit Lesson Plans	Can create and edit lesson plans
	View Lesson Plans	Can only view lesson plans
Management	Lesson Management	Can create new courses, classes and bulk assign students to classes
	Holiday Calendar	Can update the internal holiday calendar
	Staff Management	Can add and delete staff and change their access permissions
	Staff Message	Can create homepage messages for staff
	Management Info	Access to the Management Information reports
MarkBook	Create Assessment	The ability to create new assessments (normally for teachers)
	Create Course Wide Assessments	The ability to automatically create an assessment for every class in a course
	Manage Assessments	Management of all created assessments
	Enter Grades	Ability to enter grades into previously created assessments
Misc	Enter Comments	Create comment messages about students (normally for teachers)
	Comments Management	Management of the student comments system, see all created messages, and reply to them
	Staff Directory	Show the staff information directory
	Email	The functionality to get email addresses for bulk mailing etc
	Help	Access to the online help and user manuals

Registers	Enter My Registers	Enter student attendance registers for only the classes a teacher is assigned to teach
	Enter Any Registers	Enter student attendance registers for any class and course. If the user is management or administration it also allows to accept class payments
	Print Registers	Print out blank and completed registers
	Student Attendance	Show and print information about student attendance by course and class
Reports	Create Report Layout	The ability to create new student term report layouts
	Reports Management	Full management of student reports, including initiating report cycles, approving reports and publishing them to parents
	Write My Reports	Complete student reports for assigned classes by the teacher
	Print All Reports	Generate printed versions of completed reports
Students	Add Students	Add new students to the system
	Student Details	Full access to the student information function. Normally only for administration and management
System	User Permissions	Edit user permissions
	Year End	Run the academic year end processing functions. Including seting the new academic year, moving students between classes etc.
	Data Import	Import data from external systems in the adminforschools system. Only necessary when the system is first enabled
Timesheets	Timesheet Entry	Manual entry of staff attendance data.
	Timesheet Data	Show staff attendance information
	Staff Timetables	Show staff time allocations

Student Comments

The student comments function allows teachers to write comments/message about their students that they think are important for the administration staff or management to see, and if appropriate indicate that some action is required. For example a teacher might want to send a message like "Anna has constantly not done any homework, please call her parents".

Writing comments (Teachers)

- Go to **Comments**
- Select the appropriate course
- Select the appropriate class
- Click on the student you want to write the comment about.
- Click on the + icon
- **Action Required?:** Indicate if the administration staff/Management should take an action based on the comment
- **Comment:** The message you want to write
- Click on the **[Save]** button

Managing teacher comments

From here you can see all the comments that teachers have written, identify any new ones, and respond to them if necessary

- Go to **Comments**
- Select the time period you are interested in, by default it's the last 7 days
- Select the status of the comments you want to see. By default, it is set to **All** comments, but you can change this to select only ones that currently need an action, or are awaiting an update
- Click on the students name to see the message
- If all you want to do is change the status of a comment click on the icon until your chosen status is shown. And you can now close the window.
- If you also want to write a follow up message back to the teacher in addition to changing the status, write your message in the Information field and click the **[Save]** button.

Settings

System Settings

It here that you can setup some basic settings for the AdminForSchools system so it behaves in a way appropriate to your business. You can also change the logo that appears in the top left corner of the screen and as the default logo on printed documents.

- Go to **Settings**->**System Setup**

Academic Year Format	The format the academic year appears as throughout the system. For example, if you are in Academic Year 2023 it can appear as either **2023** or **2023-24**
Academic Year First Month	The first month of your Academic year
Day First Hour	The normal first working hour of a day
Day Last Hour	The normal last working hour of a day
Date format	The format that dates are presented in in the system. For example, if it was 16 October 2023 tit could be shown as either **16/10/23** or **10/16/23**
Export Type	Currently the default is XLS for most exports
Teachers can send Messages	Can teachers send messages from the lesson diary function? Default is NO, so facility is restricted to Management and Administrators
Registers Compulsory	Do teachers need to complete student attendance registers?
Diaries Compulsory	Do teachers need to complete lesson diaries?
Assessment Pass %	What percentage do you consider as a pass mark for internal assessments/exams?
Payment warning amount	If the value typed in when accepting or modifying payments from students exceeds this amount an error message will be generated.
Printing/Email Language	Which Language to use for headings and labels when printing receipts and invoices etc.
Reports Translation	Controls the availability of the automatic translation facility for the comment sections of student term reports Off: No translation available Manual: You will manually translate the text Automatic: The translation icon is available and clicking it will automatically translate to the selected language
Extended Login time	For security reasons, by default after an hour of in-activity the system will automatically log a user out. This can be extended to four hours by selecting this option. It is not recommended that you enable this function
Logo Image	Clicking this button allows you to upload a new logo image to display on screen in the system for staff and parents. The logo should be a minimum of **200px** x **200px** and not have a height to width ratio of more than **1:3** i.e. If the logo is **200**px high it shouldn't be more than **600**px wide. Ideally it should be on a **white** or **transparent** background.

Data Lists

The AdminForSchools system has a number of built-in data lists to save you time when entering data, and to provide consistent information for the associated data field.

School Level

On the student information page this is the "Level" field associated with the School you have entered

Leave Reasons

On the student information page when you make a student inactive (i.e., they are no longer enrolled in a class) the system presents you with the option of recording why the student left.

Editing Data Lists

- Go to **Settings**->**Edit Data Lists**
- Select the list you want to update

To add a list item

- On the bottom line of the list:
  - Type in the position on the list you want the new item to appear in
    Note: If you think you will be inserting items in the future do not number the appearance order consecutively (i.e. use 10,20,30,40 not 1,2,3,4)
  - The text for the item
  - Click the + icon

To change one or more list items

For the item(s) you wish to change:

- Type in the new order position if necessary
- Change the text if necessary
- Click on the **[Save]** button

To delete a list item

- For the item you want to delete click the icon to its right

Purge Contacts

Over time it is possible to amass contact details that are no longer attached to specific students. Normally this will happen if two siblings are registered in the system, and the contact details for each is entered separately, and then subsequently they are linked as siblings (The second set of data would be then orphaned)

The option allows you to see the contact details that are no longer attached to a student

- Go to **Settings**->**Purge Contacts**
- If you are happy to remove the contacts click the [Delete All] button at the bottom of the list
- Click Yes when prompted to confirm the deletion

Year End Processing

At the end of an Academic year and in order to start a new one there are some tasks that need to be performed to prepare the system for the new academic year. These tasks include:

- Deciding if an existing class is to continue in the new academic year
- Creating Classes for the new academic year
- Moving students from their current class to a new class in the new year
- Processing student reservations for the new year
- Telling the AdminForSchools system that the new academic year has started

Be aware that some of these tasks may take you some time to complete, especially if you have a lot of students and classes, and functionality like student attendance registers, may not be fully available until all the tasks have been completed. Ideally as far as possible the tasks should be completed while your centres are closed for a holiday.

Does a class continue in the new Academic year?

You may have Full fee and Per Hour courses/classes that will continue in the new academic year with the same students, and importantly you wish to preserve the payment information for them.

Important: This function can only be run in the first or last months of an academic year

To indicate a class continues:

- Go to **Settings**->**Year End**->**Continuing Classes**
- Select the appropriate **course**
- Ensure the link (**Continue class from**) between years is correct

You will now see a list of possible classes

- To continue a class in the new academic year, click the icon next to its name

Creating classes for the new academic year and moving Students to the classes

For classes where for example the students maybe are changing a level, and there is a new timetable and teacher you will have to create those classes in the new academic year. To help you with this process the AdminForSchools system can generate some printed class lists of your current classes and students where you can fill in the basic details for the new class (Name, Teacher, Schedule) and indicate if a student is going to that class, will be transferred to a different one or is not continuing.

To generate these lists:

- Go to **Settings**->**Year End**->**Print Student Move Sheet->*(Course Name)***

When you have completed the information on paper first create the classes for the new academic year.

- Go to **Settings**->**Year End**->**Create New classes for ….**

This will take you to the standard class management function, but you should see the academic year shown is the next one. Once the classes have been created you can move to the next step. You do not need to create all the new classes and move the students at the same time, you can return to these two functions as required until complete.

To move the students into the new classes

- Go to **Settings**->**Year End**->**Move Students**
- Select the appropriate course
- Ensure the Academic year move is correct (Move classes from)

You will now see a list of all the classes in the current academic year, and next to each one a selection list containing the new classes

- For each class you want to move first select the new class the students are going to move to
- Once select an icon will appear click on it
  You will now see a list of the students in that class

  For each student either:
  - Click the check box under the icon to indicate they will move to the class
  - Click the check box under the icon to indicate they won't be returning
  - Select the alternative class that they are going to
  - If you don't know what the student will be doing do not select anything for them

- Click the [Save] button to save your decisions
- The system will then generate a message confirming your choices, click [Yes] to confirm them

For students who you didn't know which class they were going to move to, or if they would be returning, after the start of the new academic year:

- Go to **Information**->**Students**->**Students with no class**

There you will see a list of students with no class allocation and by clicking on their name you can select a class for them or make them inactive.

Students with reserved places in the new academic year

Before the start of the academic year students may have made reservations for a place in the next academic year. (See Student Reservations) However it is unlikely at the time you will have known the details of the class they would be doing. All the students who made a reservation exist in a reservations list that now needs to be processed to allocate them to a class. To see this list

- Go to **Settings**-> **Year End** -> **Process Reservations**
- Select the course as appropriate
- For each student who's name appears in blue, click on their name
  - Select the class they will be going to
    Or
  - Make them inactive

Once you have done this for all the students who's details you know (now coloured green)

- Click on the **[Process Students]** button to actually put them into the class or make inactive

If the course has a registration fee, and the student paid a reservation fee the system will automatically allocate the reservation fee amount to the course registration fee.

User Profile

Every user of the system can edit their own personal details, change their password, and change the language the AdminForSchools system interface is presented to them.

To do this click on the icon in the top right of the screen

FirstName and **LastName**: These are used when displaying class names within the system (Sometimes abbreviated as firstname plus first letter of the lastname. Eg. Susan Jones might appear as SusanJ), and are automatically added in full to student reports as the Class teacher.

Email/Mobile/ID/Passport: These are only used in the internal staff directory function and are optional.

Help bubbles: these are small popup informational bubbles that appear when a user moves the mouse over one of the (i) icons. Normally they are found in functions that change system settings as a prompt to explain the functionality of a particular option.

Interface Language: By changing this a user can change the language the system uses for menus etc. to that user it doesn't change the language for other users or how external communications are sent.

Uploading Pre-Printed Stationary

The AdminForSchools system allows you to upload pre-printed paper to use for the generation of printed student reports, payment receipts and invoices. For each of these you can have a different layout if you want.

By default the system comes with two internal types that are a blank A4 page, one is in a Portrait orientation the other is a landscape orientation. Both of these will auto insert your uploaded logo onto the top left of the page.

Uploading Paper

- Go to **Settings**- > **Manage Paper Types**
- Click on the + icon

Name	A unique name for this paper type
Background File	The file that contains the paper layout. To upload a file first click the [Browse] button to find the file on your computer. Then click the [Upload] button. Currently the file must be a PDF file of size A4
Header image	If your paper layout does not contain a logo image and you want the system to add one, then you can by uploading the image here. To do this click the [Browse] button and then the [Upload] button. Note the image must be JPG or PNG file, and will be auto inserted in the top left or the page.
Orientation	Indicate if the paper is to be used in Portrait or landscape mode
Pages	Indicate the number of pages in the uploaded PDF file. See the note below about number of pages
Margins	These are the margins that define the printable area of your paper layout
Font	The system font to use for printing text on your documents. Note it not possible to upload additional fonts
Default Font Size	The default size of the text on a page.
Show page numbers	If **Yes** then page numbers will be shown on the bottom of any documents printed with this layout
Show printed date	If Yes then the date the document was generated will be shown on the bottom of any documents printed with this layout

- Click **[Save]** to save your document

Number of pages in a layout

Normally the number of pages in a paper layout will be 1, as most documents you print with the layout will be a single page. However, if you think that some documents may have more than 1 page then you might want to upload a PDF file with two pages. The first having you logo, address and other information on it, and the second being blank. If you upload a two page document but tell the system it only has 1 then only the first page will be used.

File types for paper and image upload

For the paper layout only PDF files are accepted. Ideally you should create your page layout in a word processing package of your choice and then either save the document as a PDF file or use a Print to PDF function. Use of a scan of an existing piece of pre-printed stationary is strongly **not** recommended.

For the logo file it must be a JPG or PNG file and for best results be between 200 and 1000 pixels high and ideally have a width no more than 3x its height (i.e. if its height is 200 pixels the width should be no more than 600 pixels) The system will automatically scale its height to fit the space. The logo will look best if it is on a transparent or pure white background.

[Print Layout] button

This button will generate a blank test page showing you where the logo will be inserted, where the margin positions are, and examples of the available fonts

[**Print Test] Button**

This button will print a test page using your layout and font, and completely fill the printable area with dummy text. The test document has two pages so you can see the effect of having a layout with more than one page