

Incident Tracker User Guide



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Incident Tracker

Path: Utilities → Incident Tracker

The Incident Tracker can be used for various incidents, almost anything that involves 'Identities'. The use of it is individual to each school and it can be set up to suit your own requirements. The Incidents can be Escalated to another level if necessary recording a train of events.

There are two prerequisites before you can use the Incident Tracker;

- Maintenance Codes need to be created for the groups of Incidents you wish to track.
- Incident Codes for the groups need to be entered.

Prerequisites;

Maintenance Codes	Incident Code Maintenance
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Creating Incidents;

Entering Incidents	Running Reports
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Maintenance Codes

Path: Utilities → maintenance Codes

A Maintenance Type of Incident needs to be created if it is not already available and Codes created for the various groups of Incidents you may wish to track.

The screenshot shows a window titled "Maintain Code Files". It has two main sections. The top section, "Code Types", contains a "Type:" field with "INCIDENT" and a "Description:" field with "Incident Categories". The bottom section, "Code Master File", contains a table with two columns: "Code" and "Description". The table has several rows, with the first row highlighted in yellow. The "Code" column of the highlighted row contains "Maint" and the "Description" column contains "Grounds maintenance".

1.	If you do not have the Type of INCIDENT create it.
2.	Enter a description and tab, when asked click Save.
3.	Enter a unique code; this can be Alpha, Numeric or a combination of both.
4.	Enter a meaningful description Tab off the line to save.

You will need to refresh the screen to view the changes.

Incident Code Maintenance

Path: Debtors → System → Incident Code Maintenance

Or Path: Scholastic → System Functions → Incident Code Maintenance

The screenshot shows a window titled "Incident Code Maintenance". At the top, there is a "Category:" dropdown menu set to "Homework". Below this is a table with columns: "Code >>", "Desc", "Alert Identity >>", "Alert Level", and "Email". The first row of the table has "MATHS12" in the "Code >>" column and "Maths Year 12" in the "Desc" column.

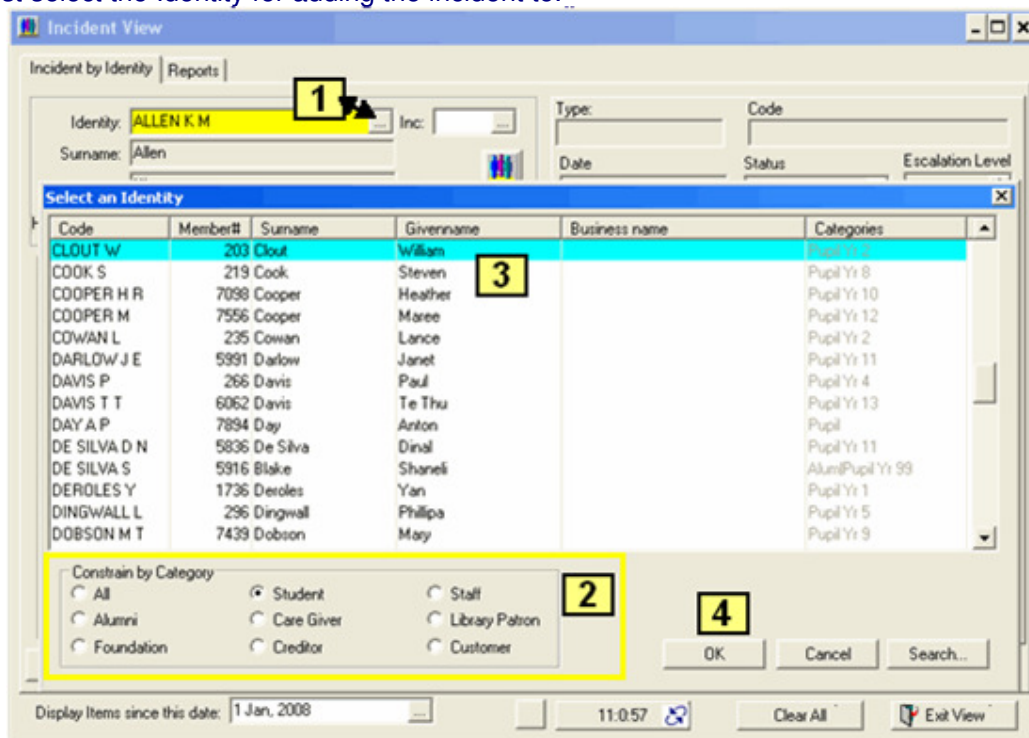
1.	Select the Category to add Incidents to.
2.	ON the next free line enter a unique code for this Incident.
3.	Enter a meaningful description.

Entering Incidents

Path: Utilities → Incident Tracker

Select the Identity

You must select the Identity for adding the incident to.



1.	Click on the Identity Selection Box.
2.	Optional: check a category to view the Identities.
3.	Highlight the Identity.
4.	Click OK.

Add the Incident Details

Incidents can be added as necessary to the Tracker.

1.	Click New Incident to create an Incident.
2.	The incident number will be created automatically when the Incident is saved.
3.	Click to View Family details.
4.	Select the Type of Incident.
5.	Select the Code.
6.	The date will default. Can edit.
7.	The Status will default. Can select an alternative from the drop down list.
8.	Escalation Level will default with every Sub Incident Added.
9.	A Reminder Date can be entered.
10.	The Contact Person will default from the Identity selected.
11.	Enter a brief description of the Incident.
12.	Optional: Enter comments about the Incident.
13.	Will default to the person logged onto PCSchool. Can Edit.
14.	Optional: Select the Identity that will be attending to this Incident, this can be emailed to them.
15.	Save The Incident.
16.	The Incident can now be viewed.

Follow up an Incident

You can add follow up records of the Incident.

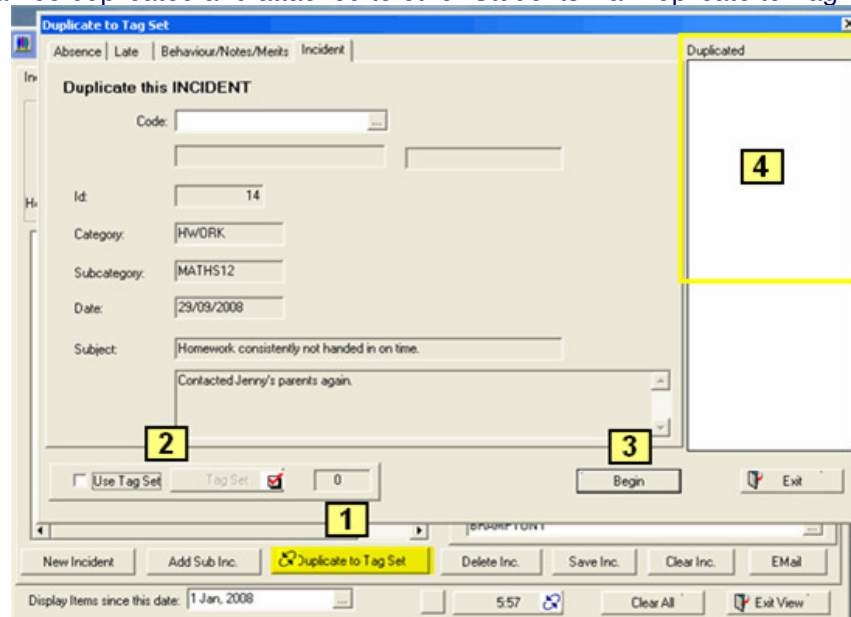
The screenshot shows the 'Incident View' window with the following details:

- Incident by Identity | Reports**
- Identity: BRADSTREET J Inc: 14
- Surname: Bradstreet
- Known As: Jenny
- Home: 03 432 4435 Mobile:
- Type: HWORK Code: MATHS12
- Date: 29/09/2008 Status: Initial Escalation Level: 1
- Reminder Date: 03/10/2008 Contact: Jenny Bradstreet
- Subject: Homework consistently not handed in on time.
- 12-22/09/2008 - Homework consistently not handed in on time.
- 14-29/09/2008 - Homework consistently not handed in on time.
- Contacted Jenny's parents again.
- Individual recording incident: PCSCHOOL
- Passed To: BRAMPTON I
- Buttons: New Incident, Add Sub Inc., Duplicate to Tag Set, Delete Inc., Save Inc., Clear Inc., Email
- Display Items since this date: 1 Jan, 2008
- 14:058 Clear All Exit View

1.	Highlight the Incident to add the Follow Up to.
2.	Click Add Sub Inc and information from the first entry will default.
3.	Optional: Select a new Status.
4.	Escalation level will default to the next number.
5.	Optional: A reminder date can be selected.
6.	Enter the new details.
7.	Optional: Select a person to pass this to.
8.	Click to Save the Incident.

Duplicate to Other Students

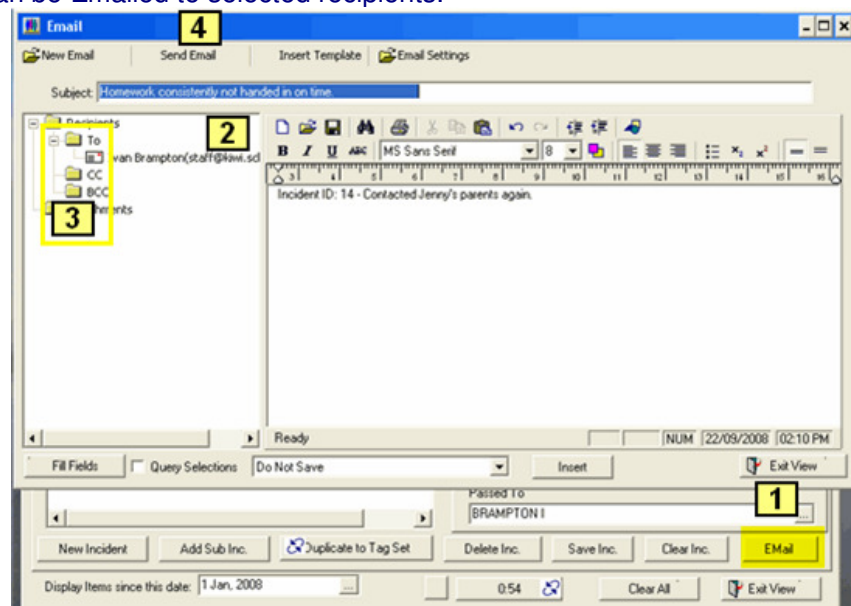
The Incident can be duplicated and attached to other Students via 'Duplicate to Tag Set'.



1. Click Duplicate to Tag Set.
2. Check the Use Tag Set box.
3. Click Begin.
4. A list of the Students the Incident has Been added to will be populated.

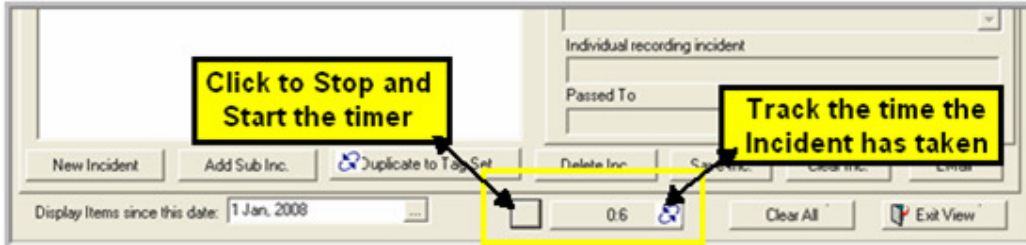
Email the Incident

The Incident can be Emailed to selected recipients.



1. Click Email.
2. The teacher this is Passed to will default as the email address.
3. Select any other method of adding more Email addresses.
4. Click Send Email.

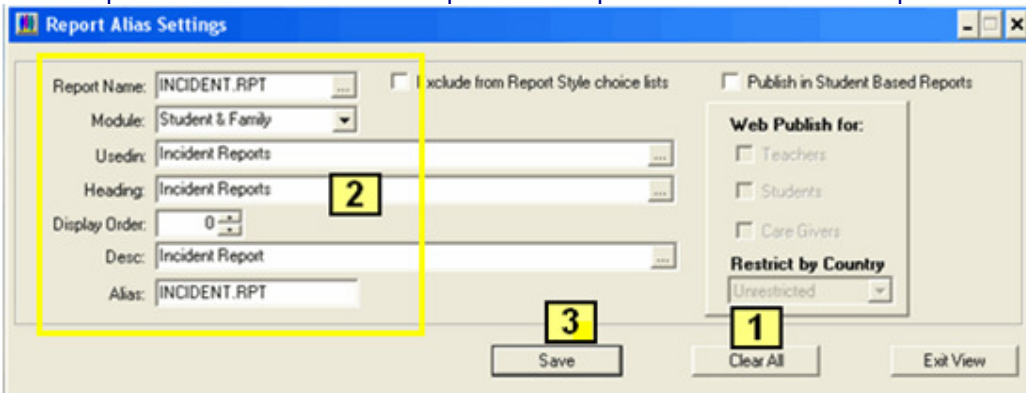
You can keep a track of the time and make a note of it for future reference.



- You can keep a record of the time taken by the Incidents.
- The timer can be stopped and restarted from the same place.
- Click the Timer Button to reset the timer.
- You can record the time in the Incident.

Running Reports

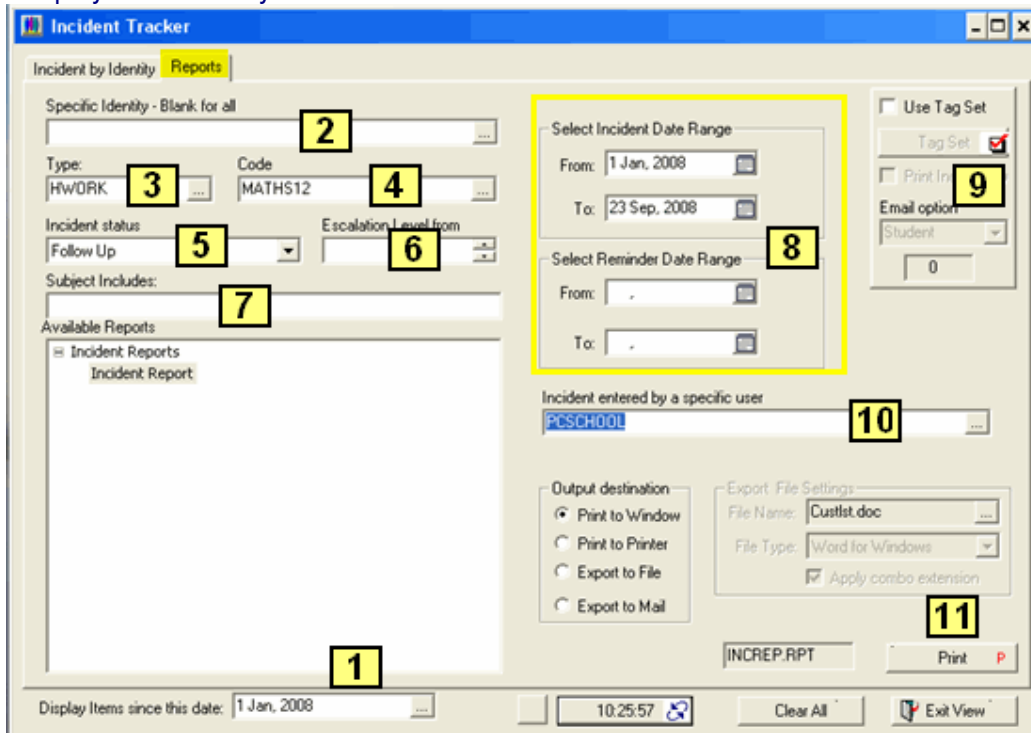
If you have no report available in Incident Reports set it up as below in Utilities/Report Alias Settings.



1. Click Clear All.
2. Enter Details:
 - Enter Report Name.
 - Select Module.
 - Select Usedin.
 - Heading will default.
 - Optional, enter display order.
 - Enter Description.
 - Alias will default.
3. Click Save.

Path: Utilities → eMerge

All Filters are Optional; you can just click Print and get all the Incidents the Date Range will default from the Display date to today's date.



1.	Will Default, can edit.
2.	Optional: Select a single Identity.
3.	Optional: Select the Type of Incident.
4.	Optional: Select an Incident Code.
5.	Optional: Select an Incident Status.
6.	Optional: Select an Escalation Level.
7.	Optional: Enter the Subject; this must be exactly the same as entered. You can copy and paste the Subject.
8.	Optional: Select Date Ranges.
9.	Optional: use a Tag Set for selecting the students.
10.	Optional: Select a User Code.
11.	When any or all the filters are in place, click Print.

Example of an Incident Report.

