

## Foundation Tech Tip 1



**Transfer Student Information to the Foundation**

When departing Students and sending them to the Alumni information can be taken with the Students and mailing lists created using this information.

This Tech Tip is for two Feature of the Foundation:

1. How to create a mailing list for Students who attended year 10 and also for Students who attended year 12. The same Students may be in both year levels.
2. How to create a Sporting History in the Scholastic Module and transfer it to the Foundation with the Student.

This same method can be used for gathering many types of information.

**Table of Contents**

**Transfer Student Information to the Foundation .....2**

***Year of Students .....3***

**Mailing List for Year of Students .....3**

    Create an Activity .....3

    Add a Student to User Defined.....4

    Add the Year of to the Student Code.....5

**Add the codes to the Students .....6**

    Create a Tag Set for Departed Students. ....7

    Create a Tag Set for Current Students .....8

    Adding the User Defined Field to the Students.....9

    View the Details ..... 10

**Send the Departed Students to Alumni..... 11**

    Manually Tag the Students..... 11

    Finish the process ..... 12

**Prepare your Mailing List ..... 13**

    View the details..... 13

    Tag the Members ..... 14

    Create a Word Merge File ..... 15

***Sporting History Record ..... 16***

**Sporting History Record..... 16**

    Create Activity Codes..... 16

**Create your Sporting Codes..... 17**

    Add the Codes to Students ..... 18

    View the details in the Foundation..... 18

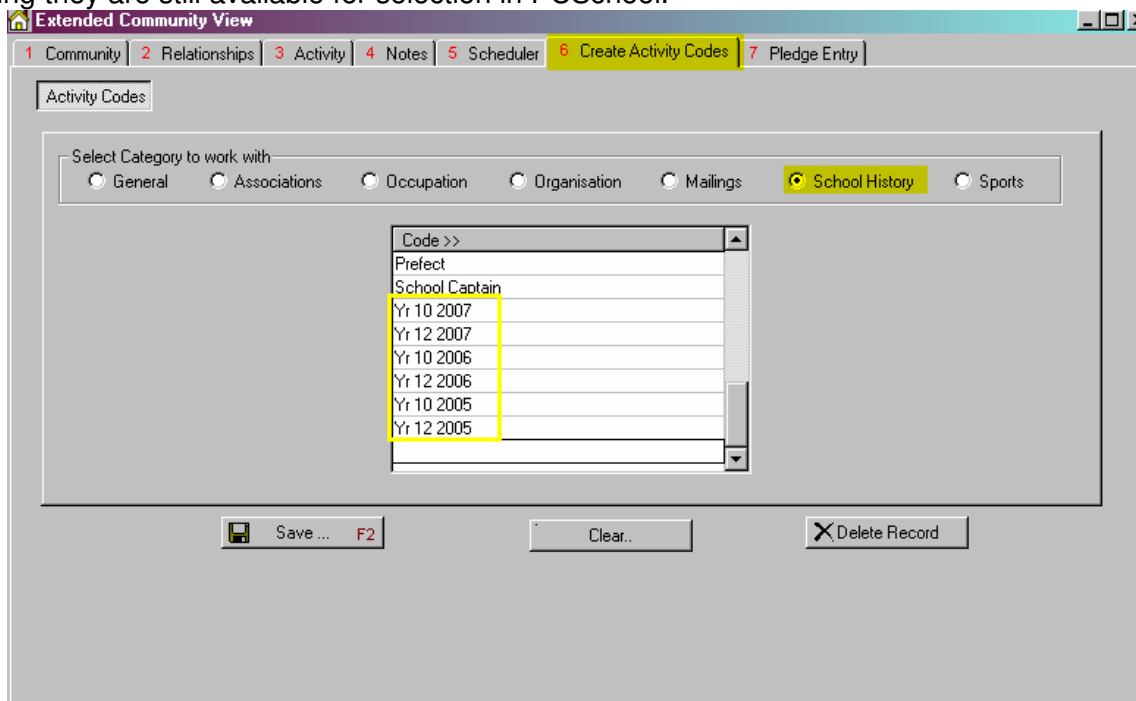
## Year of Students

### Mailing List for Year of Students

#### Create an Activity

**Path:** Foundation → Community → Extended Community View → Create Activity Codes

Create an Activity for each Year that you will need you can add year 99 students to the codes providing they are still available for selection in PCSchool.



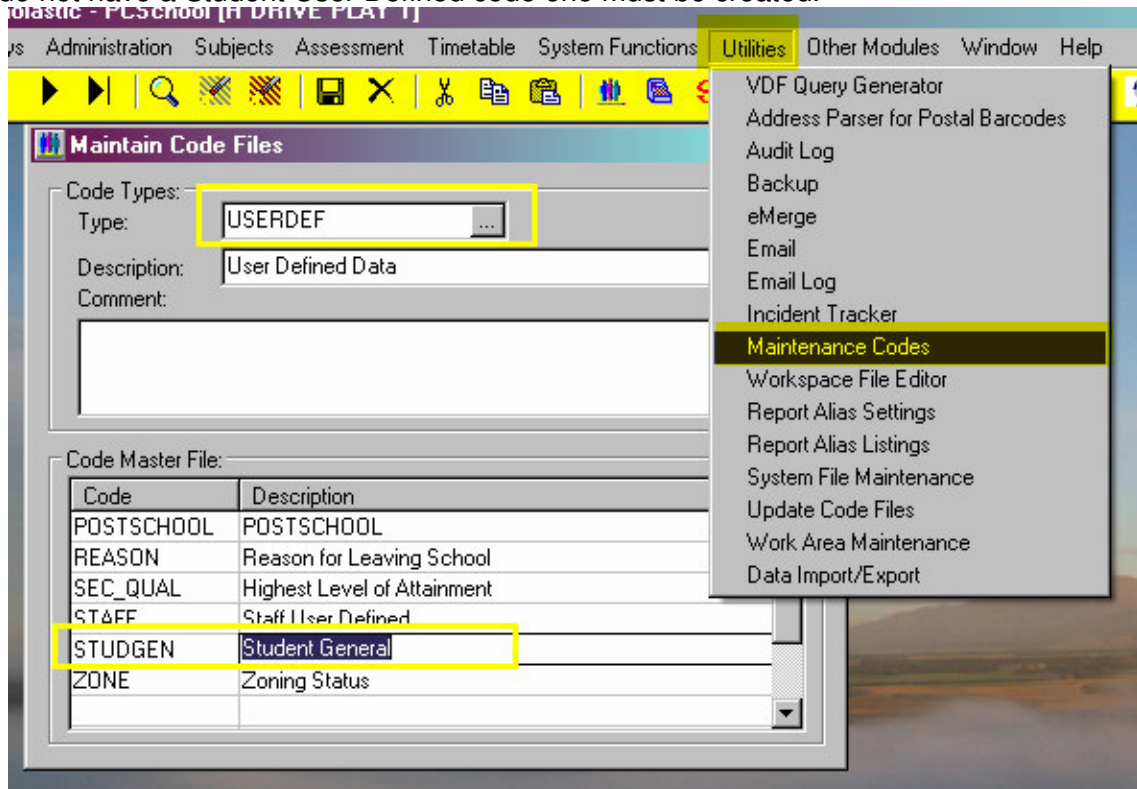
#### Create Activity Codes

•	Category	Select School History.
•	Code	Enter the code name you wish to use.
•	Save	Click to save or tab off the line.

### Add a Student Category to User Defined

**Path:** Scholastic → Utilities → Maintenance Codes

If you do not have a Student User Defined code one must be created.



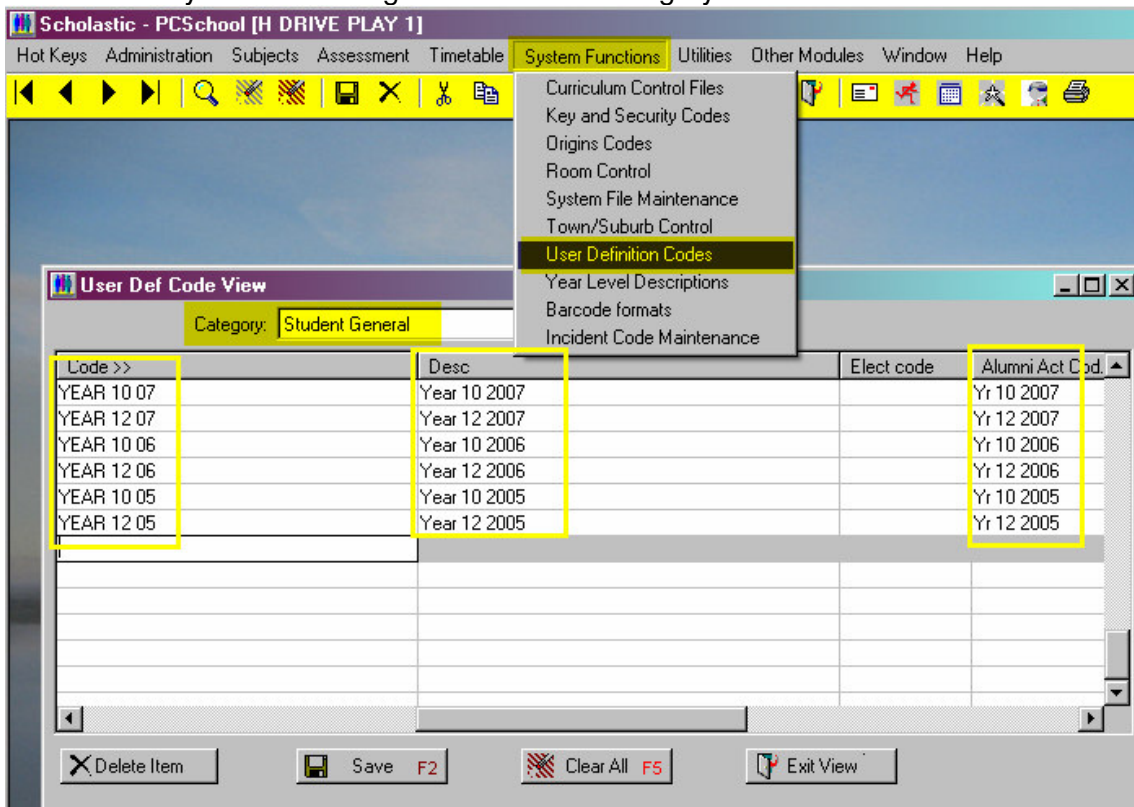
Create a Student User Defined Code;

- |   |   |
|---|---|
| • | From the drop down list select USERDEF.                   |
| • | Scroll to the last line.                                  |
| • | Tab to the next free line.                                |
| • | Create a Student Code.                                    |
| • | Tab off the line.   |
| • | Refresh the Scholastic View in order to see the new code. |

### Add Year of to the Student Code

**Path:** Scholastic → System Functions → User Definition Codes

Create all the codes you will be using in the Student Category.



Enter the Codes and attach to the Foundation;

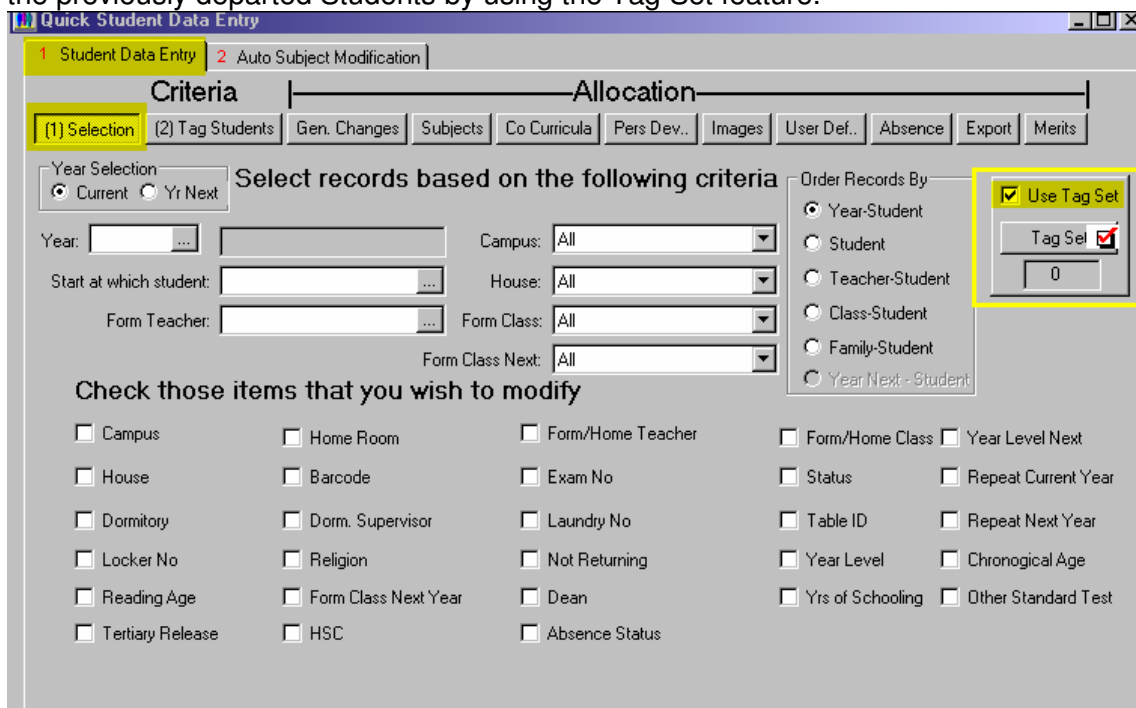
- |   |  |
|---|--|
| • | From the drop down list select the Student Category you created. |
| • | Enter a Code to be used.   |
| • | Enter the Description.   |
| • | Select the Alumni Code from the Foundation List.                 |
| • | Tab off the lines to save.                                       |

### Add the codes to the Students

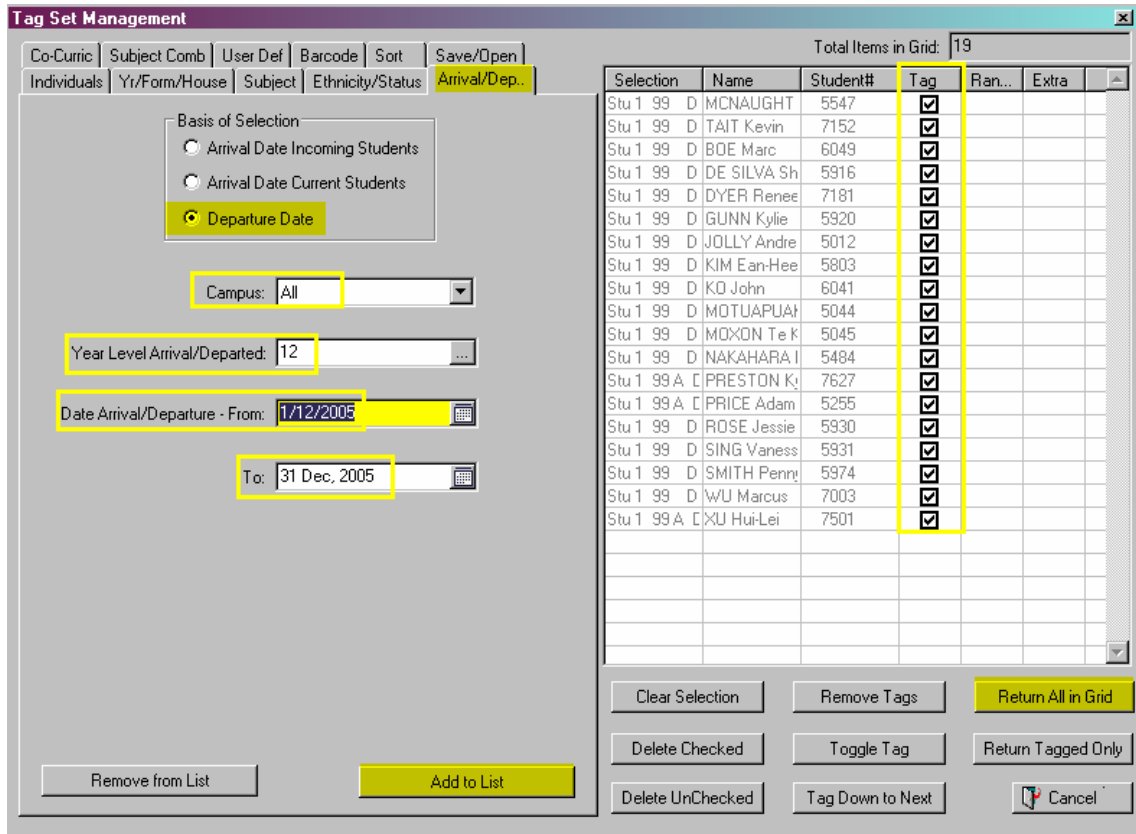
The Codes can be added to Student Globally through Quick Family Accounting Adjustments or individually through Student View, Enrolment then User Defined.

**Path:** Administration → Quick Student Data Entry

Select the previously departed Students by using the Tag Set feature.



**Create a Tag Set for Departed Students.**

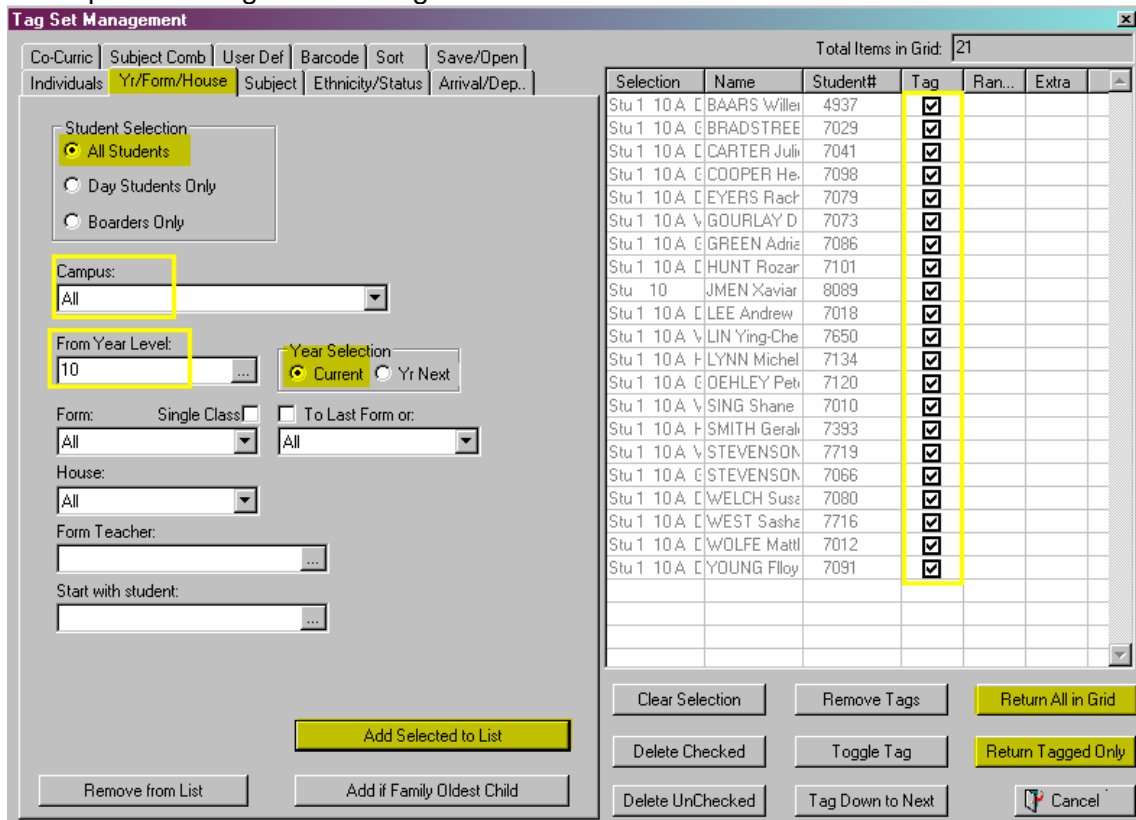


Select filters for creating a Tag Set of previous year levels;

•	Check Departure Date.
•	Select a Campus if applicable.
•	Select the Year level the Students were in prior to departing.
•	Select the Departure date From.
•	Select the Departure date To.
•	Click Add to List.
•	Check or uncheck the Students.
•	Click Return All in Grid to select all the Students regardless of Checks.
•	Click Return Tagged Only if you are not selecting all Students.

### Create a Tag Set for Current Students

Tag Sets for Current Students can be created in the same way you can only work with one Tag Set at a time but you can keep adding to the Tag Set through the different tabs, this list could have been added to the previous Tag Set if adding the same User Defined Field.

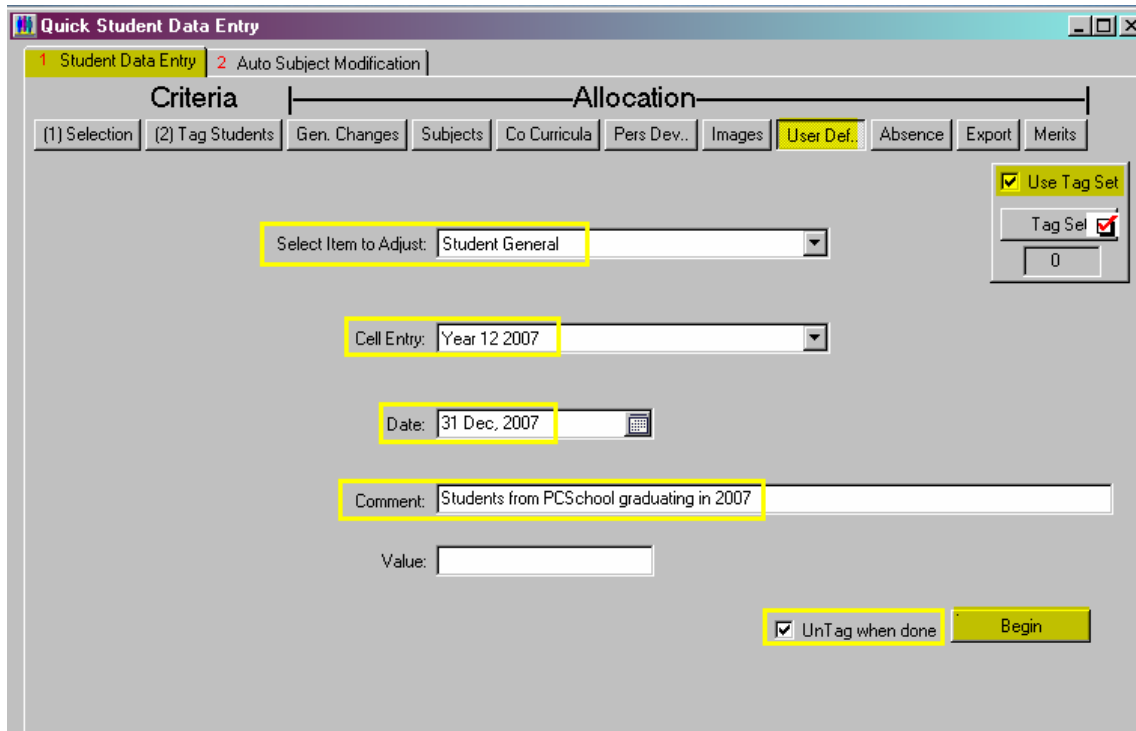


Select the filters for the tag Set for current year levels;

•	Select All Students.
•	Select a Campus if applicable.
•	Select the Year level of the Students.
•	Click Add Selected to List.
•	Check or uncheck the Students.
•	Click Return All in Grid to select all the Students regardless of Checks.
•	Click Return Tagged Only if you are not selecting all Students.



### Adding the User Defined Field to the Students



Select filters for adding User Defined fields;

•	Select Item to Adjust from the drop down list.
•	Select the Code you want to add to the Tagged Students.
•	Select the correct Date for the departure of the Students.
•	The comment will Transfer to the Alumni.
•	Leave the tick in UnTag when done if you will not be working with the same group of Students again.
•	Click Begin to start the process.
•	When the Students finish school and are sent to the Alumni this record will transfer with them.

### View the Details

The details can be viewed in Student View, Enrolment Tab, User Defined field.

Student VACCINE AT FRONT OFFICE - BEE STINGS

Student Key: ALLEN K M    Regn: 7655    Gender: Female

Surname: Allen    Given: Kate

Known As: Kirsty    Middle: Maree

Current Year: 99    Birth Date: 11/02/1991    Age Today: 16.09    Age As at: 06/08/2007    16.05

1 Care Givers   2 Address   3 Family Misc...   4 Enrolment   5 Scholastic   6 Personal   7 Medical   8 Med History   9 Comments   0 Misc.

Enrolment   User Defined   Boarding

User Defined Categories

Type	Code >>	Desc	Value	Date >>
STUDGEN	YEAR 12 0;	Year 12 2007		31/12/2007

Migrant  
 Visa  
 Overseas  
 Interstate  
 Birth Cert. Sighted  
 Tag For Alumni  
 Sent to Alumni

Save   Clear   Delete

Restrict by Year: Left School    Restrict by Campus: All    Link to New Family L    Save F2    Clear All F5    Name Search S    Exit View

## Send the Departed Students to Alumni

Students can be globally set to the Alumni with the End of Year process by checking **Transfer Departed Students to Alumni**, or they can be manually tagged and sent.

### Manually Tag the Students

Students can be tagged manually through the User Defined field in Student View, click save once you have tagged the Students.

The screenshot shows the 'Student View' window for a student with the following details:

- Student Key: XU H
- Regn: 7501
- Gender: Female
- Surname: Xu
- Given: Hui-Lei
- Known As: Harriette
- Middle:
- Current Year: 99
- Birth Date: 14/06/1986
- Age Today: 21.05
- Age As at: 06/08/2007

The 'Enrolment' tab is active, and the 'User Defined' sub-tab is selected. The 'User Defined Categories' section shows a table with the following data:

Code >>	Desc	Value	Date >>
YEAR 12 0:	Year 12 2007		31/12/2007

On the right side of the 'User Defined Categories' section, the following checkboxes are visible:

- Migrant
- Visa
- Overseas
- Interstate
- Birth Cert. Sighted
- Tag For Alumni
- Sent to Alumni

At the bottom of the window, there are three buttons: 'Save', 'Clear', and 'Delete'.

### Finish the process

Then run the Housekeeping procedure to send the students to Alumni.

Year	Description	Next Year	Depart ...
9	Year 9	10	<input type="checkbox"/>
10	Year 10	11	<input type="checkbox"/>
11	Year 11	12	<input type="checkbox"/>
12	Year 12	13	<input type="checkbox"/>
13	Year 13	99	<input checked="" type="checkbox"/>
PS	Pre School	0	<input type="checkbox"/>

**Year End Procedures**

- Update Student Year Levels
- Update Student Form Class with Class Next
- Transfer Departed Students to Alumni

Departure Date: . . .

**Incoming Students**

- Roll in Yet to Come Students

Arrival Date From: . . . Arrival Date To: . . .

Accept. Date From: . . .

Acceptance Status: All

**Check Update Yr/Yr Next to Access** ↑  
 Student's will change year levels as indicated.

**Housekeeping**

- Zero Absence/Lates
- Zero Both
- Zero Behaviour/Merits
- Recalculate Absence/Lates/Merits
- Recalc Subj. Absence
- Recalc Absent Day Interval

Date From: . . . Date To: . . .

Transfer 'Tagged for Alumni' to Alumni

Name Update

Update Student Year Level Next

Arrival Date From: . . . Arrival Date To: . . .

Accept. Date From: . . .

Acceptance Status: All

**Begin Process**

**Exit View**

## Prepare your Mailing List

### View the details

**Path:** Foundation → Community → Extended Community View → Activity

Once the Students have been departed you can view the information in the Foundation Module.

The screenshot shows a software window titled "Extended Community View" with a menu bar containing: 1 Community, 2 Relationships, 3 Activity, 4 Notes, 5 Scheduler, 6 Create Activity Codes, 7 Pledge Entry. The main area contains a form with the following fields:

- Member: XU H
- Surname: Xu
- Givenname: Hui-Lei
- Category: ALL

Below the form is a table with the following data:

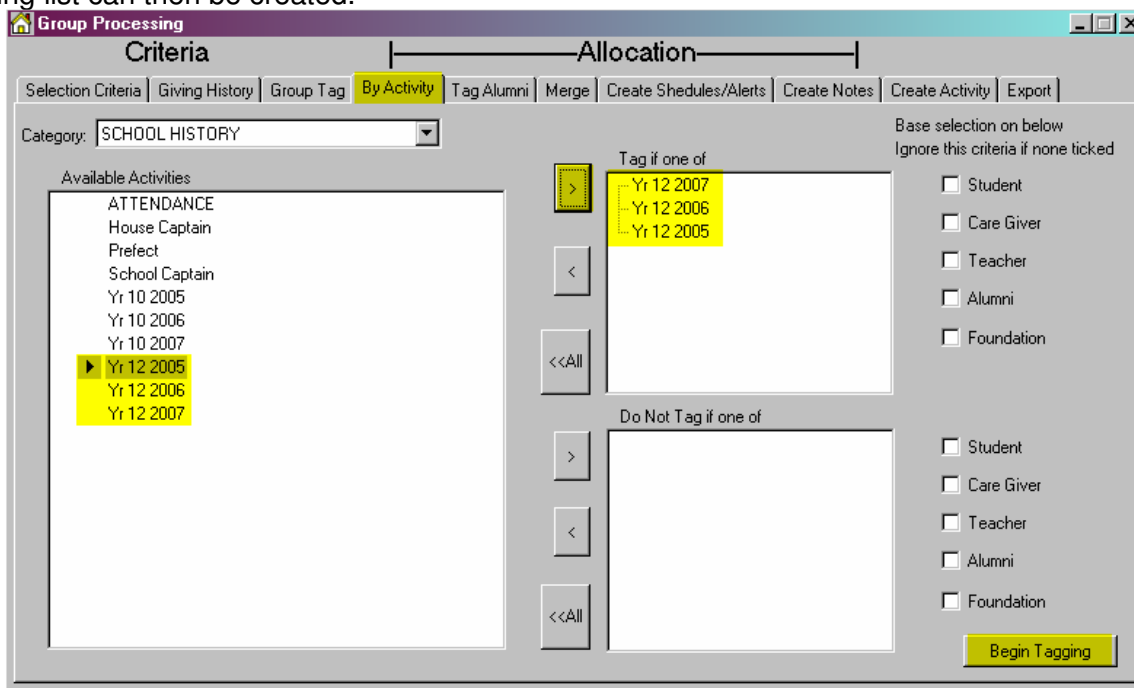
Code >>	Category	Short Comment	Date From >>	Date To >>
Yr 12 2007	SCHOOL HIS		31/12/2007	
ATTENDANCE	SCHOOL HIS	LEFT SCHOOL	31/12/2007	

Below the table is a "Comment:" field with a text area. At the bottom of the window are four buttons: "Clear Act.", "Save Act.. F2", "Delete Act.", and "Clear All F5".

## Tag the Members

**Path:** Foundation → Community → Group Processing Inc Mail Merge

A Mailing list can then be created.

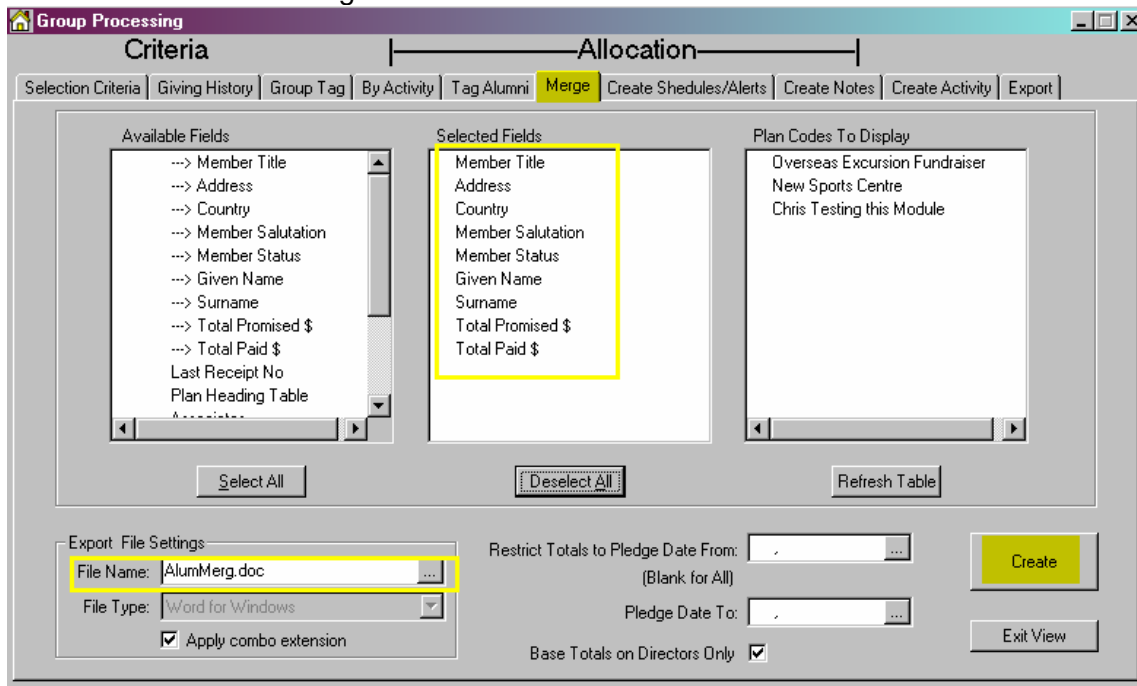


To create a mailing list follow the steps below;

•	Select the Correct Category.
•	Highlight the Activity for the mail Merge.
•	Click the Arrow button.
•	You can have multiple Activities selected.
•	Click Begin Tagging, you will be asked to Untag first, click Yes.
•	This process will tag all the Members in the Activity.

### Create a Word Merge File

You can now create a Word Merge file.



To create the Word Merge follow the steps below;

- |   |   |
|---|---|
| • | Select the Fields you want to send to Word Merge.                         |
| • | Create a name for the file and save it where you will be able to find it. |
| • | Click Create to create the document for merging.                          |

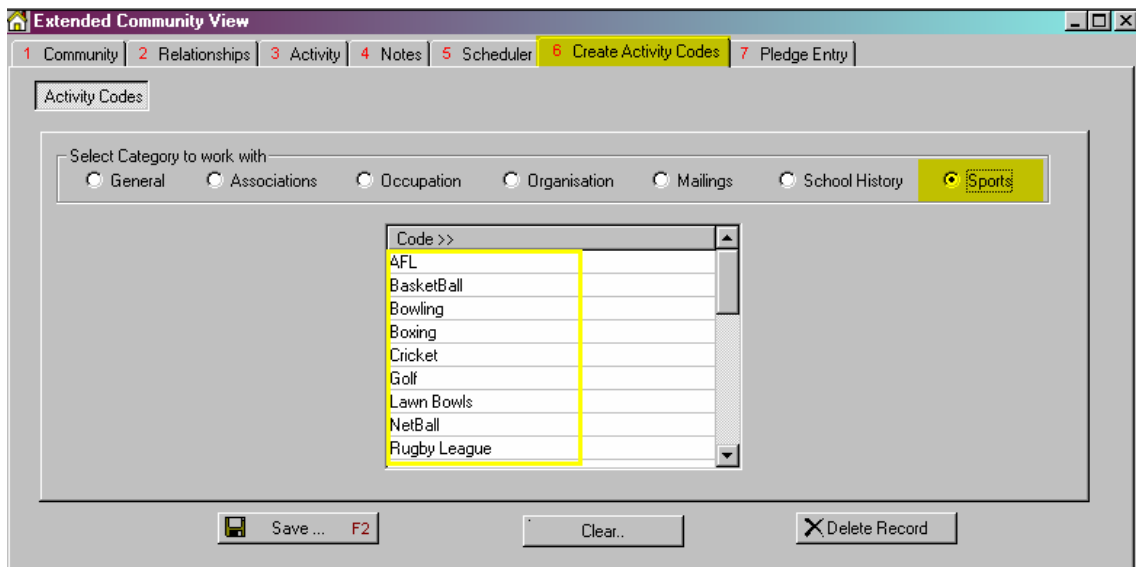
For Further information on Word Merge please read the Foundation Manual.

# Sporting History Record

## Sporting History Record

### Create Activity Codes

**Path:** Foundation → Community → Extended Community View → Create Activity Codes



Create Activity Codes;

•	Category	Select School History.
•	Code	Enter the code name you wish to use.
•	Save	Click to save or tab off the line.



## Create your Sporting Codes

**Path:** Scholastic → Other Modules – Personal Development

Code Setup.

The screenshot shows a software window titled "Personal Development" with four tabs: "1 Certificate Launch", "2 Entry", "3 Code Setup", and "4 Housekeeping". The "Code Setup" tab is active. The form contains the following fields:

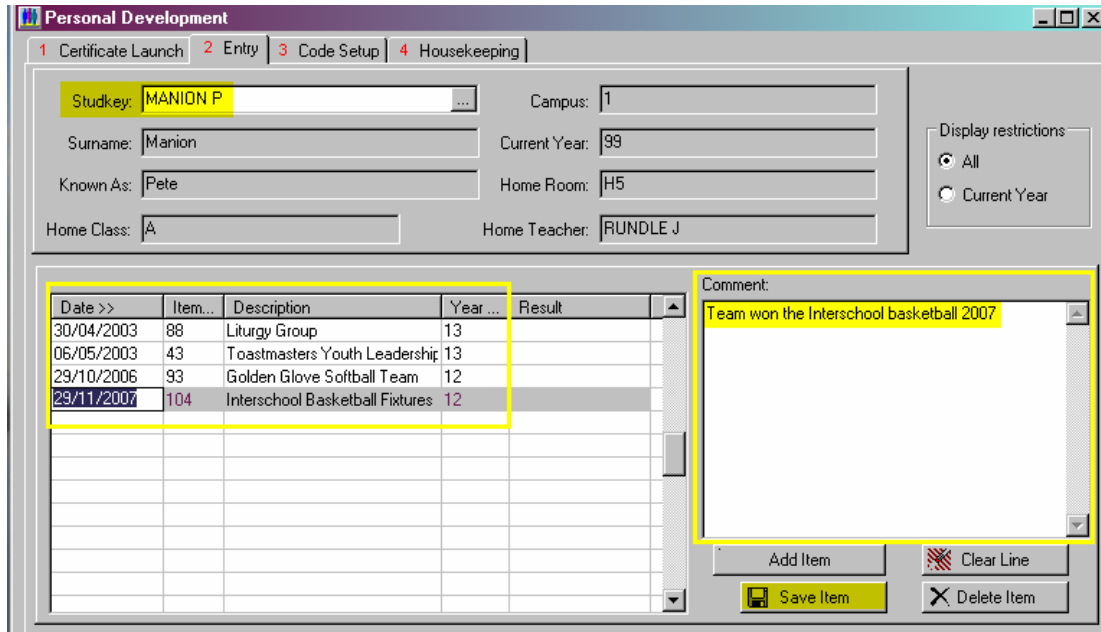
- Code:** 104
- Sort Code:** SP4
- Desc:** Interschool Basketball Fixtures
- Default Year:** 0
- Type:** General
- Category:** SPORTS
- Code:** BasketBall

At the bottom of the window, there are three buttons: "Save", "Clear All", and "Delete".

To create your sporting codes follow the steps below;

•	Enter a unique Code; alpha, numeric or a combination.
•	Optional; enter a sort code. This does not transfer to the Foundation.
•	Enter your description. This does not transfer to the Foundation.
•	Optional; Select a Current Year Level. This does not transfer to the Foundation.
•	Optional; Select Student Based. This does not transfer to the Foundation.
•	Select a Foundation Category this does transfer to the Alumni.
•	Click Save.

### Add the Codes to Students



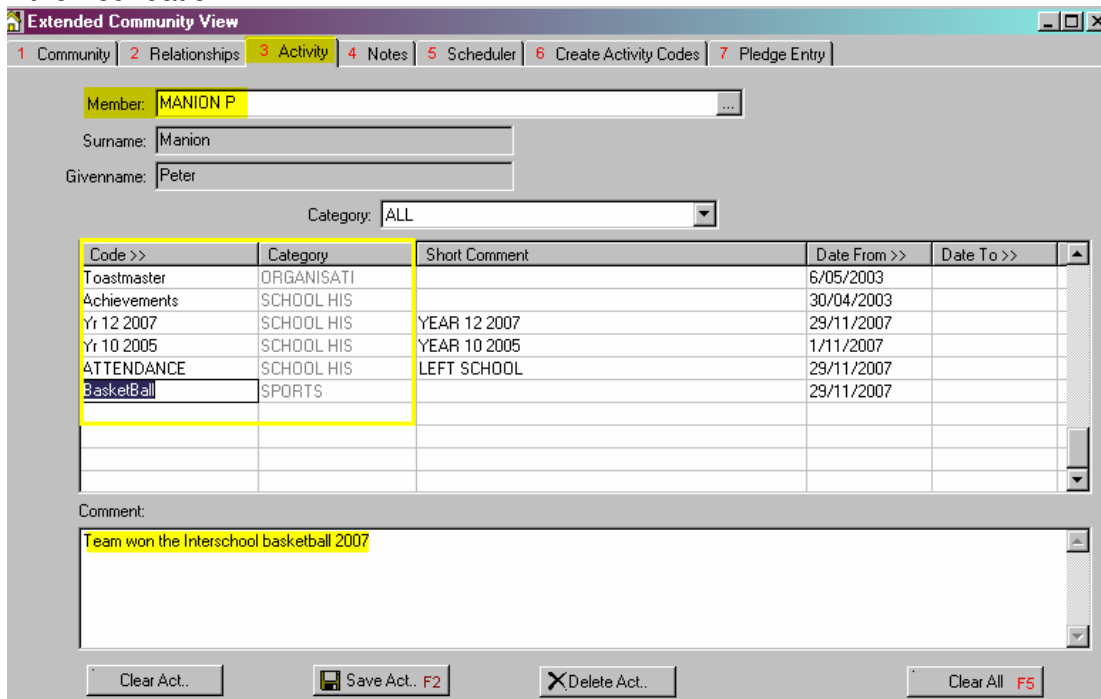
Add the codes to the students;

- Select a Student.
- Select the details to be recorded in the Foundation.
- The comment entered here will transfer to the Foundation.

### View the details in the Foundation

**Path:** Foundation → Community → Extended Community View - Activity

The Students must be Departed, Tagged for Alumni and sent to Alumni for the information to be viewed in the Foundation.



A Word Merge document can be created as for the Year of Students.