

SM-Reports Guide

Page

SM-Reports outline	1
SM-Reports process in detail	
Make an archive of the database	2
Backup the outcomes and definitions	2
Clear the database	2
Import the class lists with the File Import School data command	2
View the lists of classes for each student checking for obvious mistakes	2
Print the class lists with the Print Class lists command	2
Import the outcomes with the File Import Outcomes command	3
Import any new statements for the teacher comment databank with the File Import Statements command	4
Follow the steps in the Help School information command to set up the Report Definition command	5
Print an empty report for each subject	5
Make a single work file to check for obvious mistakes	5
Make a work file for each teacher on the network	6
Make a new Setup diskette with the Tools Create diskette Workstation installation command for teachers who work at home	6
Give out teacher passwords and announce when the work files must be completed ..	6
Wait while teachers do their work	6
Correct any problems with class lists	6
Fix any problem work files with the Tools Synchronise work files command	6
Update from the work files regularly	7
Use the File Report Information command to monitor teacher progress	7
Repeat steps 15 to 19 while teachers are doing reports	7
Make the year adviser's work file	7
Make the administrator's work file for absences or any other information not entered by year adviser	7
Update from the year adviser's work file	8
Update from the administrator's work file	8
Check the spelling of all teacher entered text with the File Report Edit command ...	8
Use the File Report Information command to check the reports are complete	8
Check the dates and headings shown in the Print Report page setup command	8
Print preview the reports looking for obvious mistakes Return to any previous step to fix problems	8
Print the final reports	9
Start planning the next set of reports	9
Solving problems and questions answered	10
Database	
Importing from SM-Timetable	12
Warnings in the Report Definition	12
Importing more than once	12
Multiple databases	13
Cleaning the database	14
Reusing outcomes	15
Changing data	
Adding new students	16
Editing classes	16
File Report Edit	19
Getting and adding new templates	19
Spell checking the entire year	19

SM-Reports Guide

Page

Printing

Text not fitting -----	20
Bottom of page not fitting -----	20
No ticks -----	20
No outcomes -----	22
Print two reports in final print -----	23
Students with subjects from other years -----	23
Roll class, cover page, subject order -----	23
Outcomes that don't fit in a box -----	23
Using printers with a separate paper bin for the cover -----	24

Problems

Cannot open locked database -----	25
Why are classes incomplete? -----	25
Recovering a bad work file -----	26
Work files that don't update Tag classes -----	26
Getting technical support sending ZIP files -----	27
Program thinks it is a trial copy -----	27
With a new template the help is not updated -----	27
Tools Advanced Quick fix command -----	28

SM-Reports outline

This supervisor's checklist gives the essentials sequence of steps you need to know to successfully use SM-Reports. Using SM-Reports is a process that should be done in a particular order to ensure the best results. Each school will have it's own variation on what is listed here, but in general the key points are the same.

1. Make an archive of the database.
2. Backup the outcomes and definitions.
3. Clear the database.
4. Import the class lists with the *File/Import/School data* command.
5. View the lists of classes for each student checking for obvious mistakes.
6. Print the class lists with the *Print/Class lists* command.
7. Import the outcomes with the *File/Import/Outcomes* command.
8. Import any new statements for the teacher comment databank with the *File/Import/Statements* command.
9. Follow the steps in the *Help/School information* command to set up the *Report/Definition* command.
10. Print an empty report for each subject.
11. Make a single work file to check for obvious mistakes.
12. Make a work file for each teacher on the network.
13. Make a new Setup diskette with the *Tools/Create diskette/Workstation installation* command for teachers who work at home.
14. Give out teacher passwords and announce when the work files must be completed
15. Wait while teachers do their work.
16. Correct any problems with class lists.
17. Fix any problem work files with the *Tools/Synchronise work files* command.
18. Update from the work files regularly.
19. Use the *File/Report/Information* command to monitor teacher progress.
20. Repeat steps 15 to 19 while teachers are doing reports.
21. Make the year adviser's work file.
22. Make the administrator's work file for absences or any other information not entered by year adviser.
23. Update from the year adviser's work file.
24. Update from the administrator's work file.
25. Check the spelling of all teacher entered text with the *File/Report/Edit* command.
26. Use the *File/Report/Information* command to check the reports are complete.
27. Check the dates and headings shown in the *Print/Report page setup* command.
28. Print preview the reports looking for obvious mistakes. Return to any previous step to fix problems.
29. Print the final reports.
30. Start planning the next set of reports.

SM-Reports process in detail

1. Make an archive of the database

By making an archive you are make a *snapshot* of all the reports. This allows you to clear the current data, while still keeping the archive to allow the reprinting of old reports.

1. Choose the *File/Archive/New* command.
2. Enter a name for the archive.
3. Choose OK.

In step 2, the name is allowed to be a descriptive name with punctuation. For example you might enter a name of 2004 Semester 1 reports.

2. Backup the outcomes and definitions

The *File/Outcomes/Store* command stores all the information in the *Report/Outcomes and Report/Definition* commands. You can choose to store the outcomes and report definition at any time and give them any convenient name.

Later you can use the *File/Outcomes/Restore* command to get the outcomes and report definition back. When you choose the *File/Outcomes/Restore* command you must first select the name of the stored outcomes and definition and then you select the year you want restored.

3. Clear the database

If it is the start of the year you would normally choose the *File/Database/Clear* command and select the *Everything, except statements and outcomes* option. This clears the database ready for a new school year.

If it is the start of the second semester you would normally choose the *File/Report/Clear* command, with the *All reports* option. If reporting is staggered and some report are still being produced from the previous semester, you can select the *Only reports in a single year* option, to clear just the year you are preparing for semester two.

In both cases, you need to enter the Supervisor's password, which is initially set to sunshine.

4. Import the class lists with the File|Import|School data command

The details of doing this varies depending on the source of the class lists. Refer to the separate section for details.

5. View the lists of classes for each student checking for obvious mistakes

Here you are not expecting to know if every student has the right classes, but instead you are looking for obvious problems. For example, does every student have the expected number of classes? Do the class codes look sensible? Is the correct number of students for the year shown below the student list?

1. Choose the *School/Students' classes* command.
2. Select the year.
3. Select the first student in the list.
4. Not using the mouse, instead using the keyboard, press the down arrow key to select the next student.
5. Repeat step 4, checking the number of classes each time.
6. Choose OK when finished.

6. Print the class lists with the Print|Class lists command

It is important to check the class lists after importing. SM-Reports may have incorrectly interpreted some information or the

timetable lists may not be accurate.

The importance of checking the class lists and getting head teachers or class teachers to sign off on them cannot be emphasised too much. In terms of time involved, it takes approximately only one tenth of the effort to fix inaccurate information now, than later in the process.

At this stage it is usually best to make any changes in your timetable program and import again.

7. Import the outcomes with the File|Import|Outcomes command

Details on entering outcomes directly into SM-Reports with the *Report/Outcomes* command is always included in the *Help/School information* command topics and should be referred to. Alternatively, outcomes can be entered into a word processor or spreadsheet and then imported with the *File/Import/Outcomes* command by first saving the document as a plain text file.

Word processor

Each line in the text file should have the following format. Note that when a word processor is used with word wrap, then each line appears as a single paragraph.

Year,Subject,Outcome name,Outcome number,Full Outcome Text

For example,

Year 9,English,Reads,1,Reads a variety of texts with understanding, enjoyment and appreciation

Year 9,English,Writes,2,"Writes effectively in a variety of registers"

Year 9,English,Listens,3,"Listens for meaning and effect to a range of speakers and contexts"

Year 9,English,Speaks,4,"Speaks articulately and expressively on a range of topics"

Year 9,English,Appreciates,5,"Appreciates a variety of literary texts"

In this example, strands one to five, which may be used to store the first five outcomes of English are imported. Looking at the first outcome, Reads is the short outcome name. The choice of this is important, as it is only the outcome name that appears in the work file when the teachers are entering their data. Some schools choose to have generic names such as Outcome 1, Outcome 2, etc.

This pattern repeats for each subject and all outcomes can be stored as a single document. There doesn't need to be any blank space between each subject.

The year and subjects must match the years and subjects in SM-Reports. Any items of text that can include a comma should be enclosed in quotations.

- A single comma must separate each field, with no extra spaces after each comma.
- The "quotes" must surround any field that has a comma in it. In my example, the full text of each outcome does not have commas in the sentences, but I have begun and ended with the quotation marks, just in case any outcome does require a comma and you want all lines to follow the same format to make it simpler for the person doing the typing.

If you were to put commas between the key words then that field would also need the quotations.

- There shouldn't be any formatting of the text. The file must be saved as a Text only file from Word (or whatever word processor is used), so any character formatting is lost anyway.

The field with the outcome wraps to the next line when shown on screen, this is normal. The only time the Enter key is used is at the end of the outcome to force a new line for the next outcome. So in effect the five fields are a single paragraph for each outcome.

- In the examples shown here, the outcomes always begin at number 1. This may not be the case in all instances and you should refer to the information about entering outcomes supplied with the report template before starting to enter the outcomes.

Spreadsheet

Entering the outcomes in a spreadsheet is similar to the above, but instead of having a paragraph for each outcome with commas separating the different fields, you can use the rows and columns to arrange the data.

Year 9	English	Reads	1	Reads a variety of texts with understanding, enjoyment and appreciation
--------	---------	-------	---	---

Year 9	English	Writes	2	Writes effectively in a variety of registers
Year 9	English	Listens	3	Listens for meaning and effect to a range of speakers and contexts
Year 9	English	Speaks	4	Speaks articulately and expressively on a range of topics
Year 9	English	Appreciates	5	Appreciates a variety of literary texts

This has two advantages:

1. You can use the Fill down command to copy duplicate data such as the year and subject.
2. You do not need to enter the commas or quotes, as you use different columns in the spreadsheet to separate the fields.
 - By entering it into Excel you must later save it with the *File/Save As* command and choose a File Type as CSV (Comma Delimited).
 - To enable the data to be imported into SM-Reports with the *File/Import/Outcomes* command. First choose the *File/Import/Outcomes* command and then you must type:

* .csv

on the File name line so the file saved from Excel will be visible.

8. Import any new statements for the teacher comment databank with the *File/Import/Statements* command

The *File/Import/Statements* command reads information from a text file into the SM-Reports databank of statements. A file of statements can be entered into a word processor and checked and then imported with this command by first saving the word processor document as a plain text file.

Entering statements in this way can be more convenient than using the *Report/Statements* command. Probably the easiest way to add statements to SM-Reports is to enter them into Word, or similar, and then import them.

This way you have the advantage of a better spell checker etc. To do this, you would enter the statements into a document in the following format:

```
New category,"This is the first statement in the new category."
New category,"This is the second statement in the new category."
New category,"This is the third statement in the new category."
New category,"This is the fourth statement in the new category."
Another category,"Blah blah blah, blah blah blah, blah blah, blah blah blah, blah blah, blah blah blah, blah blah, blah blah blah,
blah blah, blah blah blah, blah blah, blah blah blah, blah blah, blah blah blah, blah blah, blah blah blah."
Another category,"Another long statement blah blah, blah blah blah, blah blah, blah blah blah, blah blah, blah blah blah, blah blah,
blah blah blah, blah blah, blah blah blah, blah blah, blah blah blah, blah blah, blah blah blah, blah blah, blah blah blah."
```

This file can then be saved as a Text only file from Word and imported into SM-Reports with the *File/Import/Statements* command.

In this example two new categories are added to the statement databank of SM-Reports. They are New category and Another category. You can have as many categories as desired and they can be in any order.

- Each line must begin with a category name.
- Don't put any spaces before the quote marks
- Each statement should be enclosed in double quotes.
- Each statement must be a single paragraph, i.e. let long statements word wrap onto new lines.
- The document must be saved as a text file to import. Use the *File/Save As* command in Word and choose Text only in the Save as type list.

9. Follow the steps in the Help|School information command to set up the Report|Definition command

The details of the setting of the *Report/Definition* command vary from school to school according to the layout the template. This means a different help file is supplied to each school and must be followed carefully to ensure the template will work.

10. Print an empty report for each subject

1. Choose the *Print/Reports* command.
2. Select a year.
3. Turn on the *Print only selected subjects* option.
4. Don't select any students.
5. Choose OK.
6. Choose Yes.
7. Turn on the *Print sample report* option.
8. Select all subjects.
9. Choose OK.

11. Make a single work file to check for obvious mistakes

1. Choose the *File/New* command.
2. Select the year.
3. Enter the name for the work file, for example 10CHECK
4. If necessary, change the drive and folder.
5. Turn off all options.
6. Choose OK.

This makes an empty work file that includes all classes in the year. You can now open this from the main SM-Reports with the *File/Open* command.

7. Choose the *File/Open* command.
8. If necessary, change the drive and folder.
9. Select the work file with the name from step 3.
10. Choose OK.

Since you have opened this work file from the main SM-Reports program you do not need to enter a password.

11. Scroll to the left and right to view all the columns.
12. Scroll up and down to view all the students.

You are looking to see if the class looks right. For example, are all the students shown for the class and are the columns what you expect to see?

13. Try entering a long comment for the Teacher's comment in the large statement box. Keep typing until the box turns red.

Is the number of characters shown sound sensible?

14. Select another class, and repeat any checks you think are necessary.

You are not trying to test every class here. But instead do a *spot check* to catch any obvious problems that could affect all teachers.

12. Make a work file for each teacher on the network

It is assumed here that the necessary folders already exist on the network to hold the work files for each year of reports.

1. Choose the *File/New* command.
2. Select the year.
3. Enter a name for the work file, for example 10HALF04.
4. If necessary, change the drive and folder.
5. Turn on the *Create work file for each teacher in the year* option
6. Turn on the *Only classes for one teacher in each work file* option
7. All other options should be off.
8. Choose OK.

In step 3 the name entered is given to a single work file that includes all classes, but the option turned on in 5 means that as well as the file with this name a separate file based on the name of each teacher is also made.

13. Make a new Setup diskette with the Tools|Create diskette|Workstation installation command for teachers who work at home

This is only necessary, if staff are working at home or on stand alone workstations and if the statements in the *Report/Statements* command have had changes made.

- The *Tools/Create diskette/Workstation installation* command is used to make a diskette that will be used to install a copy of the SM-Reports Work File program onto a PC.

There is no need for every teacher to be given one of these diskettes as the installation Setup program only needs to be used once to get the program or statement databank on a PC, and then the Setup diskette can be passed on to another staff member to do the same thing.

14. Give out teacher passwords and announce when the work files must be completed

The *Print/Teacher passwords* command prints the list of passwords that each teacher needs to open his or her work file. Making sure the teachers know when the work files must be completed is important, because while SM-Reports allows changes to be made to the reports at anytime, late work done teachers after the year adviser has started his or her comments can add to the work of the administrator.

15. Wait while teachers do their work

Time to put your feet up and relax?

16. Correct any problems in the class lists

Once you reach this stage, further importing of class lists is usually not recommended. Instead it is recommended that all changes be made with the commands in the School menu. Examples of doing this are later in these notes.

17. Fix any problem work files with the Tools|Synchronise work files command

The *Tools/Synchronise work file* command can be used in any these cases:

- The teacher of a class has been changed.
- The list of students in a class have been changed.

- The spelling of a student's name has been changed.
- The report definition has been changed in a way that affects the columns in a work file.

To do this:

1. Use the commands in the School or Report menus to fix the data.
2. Use the *Tools/Synchronise work file* command on the work files of the affected teachers.

18. Update from the work files regularly.

1. Choose the *File/Report/Update* command.
2. If necessary, change the drive and folder.
3. Turn on the *All work files* option.
4. Choose OK.

This reads the information entered by each teacher from each work file and copies it into the main database.

If a teacher is using a work file when this is done, that work file is skipped and will need to be updated later.

19. Use the File|Report|Information command to monitor teacher progress.

This command is useful to make sure the work is proceeding to schedule. You do not want to be in the situation of only doing an update on the last day and finding work is not been completed. Doing this and the previous step regularly helps you maintain a schedule.

20. Repeat steps 15 to 19 while teachers are doing reports

21. Make the year adviser's work file

1. Choose the *File/New* command.
 2. Select the year.
 3. Enter a name for the work file, for example 10ADV04.
 4. If necessary, change the drive and folder.
 5. Turn on the *Include report information* option
 6. All other options should be off.
 7. Choose OK.
- The year adviser is then instructed to open the work file under the Staff name of for example Year 10, and you give them the password found in the *School/Years* command.
 - From there they can view and enter their information in the Roll class row for any student, and if they wish to can use the *Print/Summary* command to print a summary for each student.

22. Make the administrators work file for absences or any other information not entered by year adviser

1. Choose the *File/New* command.
2. Select the year.
3. Enter a name for the work file, for example 10ADMN04.

4. If necessary, change the drive and folder.
5. Turn off all options.
6. Choose OK.

Depending on whether the information to be entered is organised on roll classes or by a single list of all students in the year. This work file will be opened by the Administrator work name, or the year name.

23. Update from year adviser's work file

If the year adviser makes any changes or enters new information you do this.

1. Choose the *File/Report/Update* command.
2. If necessary, change the drive and folder.
3. Select the adviser's work file, for example 10ADV04.
4. Turn off all options.
5. Choose OK.

24. Update from the administrator's work file

This is exactly the same as updating from the year adviser's work file.

25. Check the spelling of all teacher entered text with the File|Report|Edit command

You would hope that any spelling mistakes have been found before now and are someone else's responsibility, but a final check is recommended.

1. Choose the *File/Report/Edit* command.
2. Select the year.
3. Choose the All button.

26. Use the File|Report|Information command to check for missing information

If you find classes are listed that you are certain are complete, refer to the problems section in the next chapter.

27. Check the dates and headings shown in the *Print/Report page setup* command

Dates and items of text that change each semester or calendar year are not usually part of a template. Instead such text is entered in the *Print/Report page setup* command. Details of this are always included in the *Help/School information* command.

28. Print preview the reports looking for obvious mistakes. Return to any previous step to fix problems

1. Choose the *Options/General* command.
2. If necessary, turn on the *Preview reports before printing* option.
3. Choose OK.
4. Choose the *Print/Reports* command.
5. Select a year.
6. Don't select any students.

7. Turn off all options.

8. Choose OK.

Doing this will result in a preview of all pages of all reports. Depending on the size of your screen and the *zoom* setting, you will not be able to read each report, but you are looking for obvious problems.

Repeatedly clicking Next will allow you to scan each page for problems. Unless you want to print the pages, choose the Close button in the preview window.

29. Print the final reports

Be sure to double check all dates and titles. Also print a few sample students to make sure the page is centred and nothing is cut off before loading the good paper.

30. Start planning the next set of reports

All over again.

Solving problems and questions answered

In this section commonly problems and questions are answered. The questions are grouped in four general areas.

- Database
- Changing data
- Printing
- Problems

There is some overlap between all four areas and it is recommended that you become with all the information here.

Database

Importing from SM-Timetable

Warnings in the *Report/Definition*

Importing more than once

Multiple databases

Cleaning the database

Reusing outcomes

Changing data

Adding new students

Editing classes

File/Report/Edit

Getting and adding new templates

Spell checking the entire year

Printing

Text not fitting

Bottom of page not fitting

No ticks

No outcomes

Print two reports in final print

Students with subjects from other years

Roll class, cover page, subject order

Outcomes that don't fit in a box

Using printers with a separate paper bin for the cover.

Problems

Cannot open locked database

Why are classes incomplete?

Recovering a bad work file

Work files that don't update Tag classes

Getting technical support sending ZIP files

Program thinks it is a trial copy

With a new template the help is not updated

Tools/Advanced/Quick fix command.

Database

Importing from SM-Timetable

SM-Timetable has its own Guide, but here are the basic steps that you can follow to copy the class lists from SM-Timetable into SM-Reports.

To create class lists that can be imported into SM-Reports, a Year is dragged onto the SM-Reports item in the Utilities Export folder. To do this you should also have a blank floppy diskette because this is where the files are put.

1. Open the Year folder.
2. Select the Scratchpad page.
3. Click and drag the Year folder onto the Scratchpad page.
4. Insert a blank diskette into drive A.
5. Open the Utilities folder.
6. Open the Export folder.
7. Click and drag the year on the Scratchpad onto the SM-Reports item in the School view.

After doing this, the three files are put on the diskette:

- ACLASS.CSV
- ASTUDENT.CSV
- ASTUDY.CSV

These files are in a format that can directly imported into SM-Reports with the *File/Import/School data* command. In SM-Reports:

1. Choose the *File/Import/School data* command.
2. If necessary, select a: in the Drives list.
3. Select Delimited files in the List files of type list.
4. Select aclass.csv in the file list.
5. Choose OK.

Wait for the data to be imported.

Warnings in the Report|Definition

The *Report/Definition* command checks what options are set when you choose OK.

- While it is not foolproof, by comparing each option with those that are on with the before and after options can detect simple mistakes. For example for an outcome report, if one outcome does haven't the *Automatic outcomes* option turned on a warning will appear as it is different from the adjacent outcomes.

On some report templates, it may be necessary for two adjacent options to be set differently. If this is the case, a warning can be ignored if after checking the options set you know they are correct.

- In the *Report/Definition* command if warnings are shown when choosing OK, choosing OK for a second time will save the settings you have made.

Importing more than once

SM-Reports is designed to allow importing of school class lists more than once. Importing does not clear the information that you have already entered, so you can import additional times to ensure the lists are accurate.

But there are some conditions you need to know about.

- The outcomes are associated with the subject names shown in the *School/Subjects* command. This means if the subject names have changed in the data you are importing you may lose the outcomes of those subjects that have changed.
- If the names of the students are altered in the external database when you import again there will be doubling up of student names. When importing SM-Reports is not able to determine when a student's name has been altered and it will treat a different spelling as a new student.
- If you have edited the teacher and subject names in SM-Reports because they are not in a suitable format in your external database you can turn off the *Update courses and teachers* option in the *Options/General* command. If this option is off, whenever the *File/Import/School data* command is used only the class lists are updated.
- When the *File/Import/School data* command is used, SM-Reports does not remove old students from the database. If any student that is not in the external database were removed from the SM-Reports database there is a potential for serious data loss if incorrect or wrong files were imported.

What this means is that as students leave the school they need to be explicitly deleted from SM-Reports with the *School/Students* command.

Multiple databases

When using the main SM-Reports program there can only be one Supervisor (or Administrator) using the program at a time. This is because the main database is only a *single user* system. There is a way around this limitation on all copies of SM-Reports dated on and after the 1st of February 2001.

When set up to allow multiple access you could, for example, be updating the main database with year 7 work files, while also editing data in the main database for year 11.

- The approach detailed below only works if the student years are independent. i.e. students are not in academic classes from more than one year - vertically streamed. Although, see the notes at the end for having more than one year in a database.

More than one database

The key to allowing work on separate years is to use the *File/Database/New* command to create a separate database for each year that you want to work on independently. This must be done before importing class lists and setting up the reports.

Once this is done, each time you start SM-Reports you can use the *File/Database/Use* command to switch to the database (year) you need to work on. Then by running SM-Reports again you can use the *File/Database/Use* command to switch to another year. Each running copy of SM-Reports can be doing different actions on each database.

Preparing

To set up multiple database access, do the following:

1. Run SM-Reports.
2. Choose the *File/Database/New* command.
3. Enter the database name, for example YEAR7. The name must have no spaces or punctuation and is limited to eight letters.
4. Choose OK.

Repeat steps 2 to 4 for each year.

Then each time you use SM-Reports you must do the following:

1. Run SM-Reports.
2. Choose the *File/Database/Use* command.
3. Select the database you want to work in.
4. Choose OK.

Continue to work with SM-Reports as you normally would. You can switch to another database at anytime by using the *File/Database/Use* command.

Multiple Users

The above technique can be used by a you, a single user, to have more than one copy of SM-Reports running on a single workstation to allow more than one action to be done at once. In the same way, if SM-Reports is on a network, different supervisors can be working on separate years at the same time.

SM-Reports Versions

Versions of SM-Reports dated on, or after, the 19th of February 2002, have a new feature in the SM-Reports Login box that allows you to select the database you want to use when the program is started. This is a convenience when working with more than one database.

Running SM-Reports more than once

If the copy of SM-Reports that you are using is dated before the 19th of February 2002, and you want to run more than one copy of SM-Reports from a single workstation you must make the following change to the SM-Reports shortcut on your Windows Desktop. In the Properties of the shortcut, the text /m must be added to the Target. For example, if the Target is currently:

```
R:\REPORTS\Smreport.exe
```

you must change it to:

```
R:\REPORTS\Smreport.exe /m
```

The m stands for multiple. This change is not required to allow different users to access the program more than once on a network, or if the newer version of SM-Reports is installed.

- When using SM-Reports with more than one database, each database is independent and you cannot collate and print reports from different databases as a single group.
- A database can have more than one year, for example, you could choose to have three databases. One for years 7 and 8, another for 9 and 10, and one for years 11 and 12. This allows three users to work simultaneously.

Cleaning the database

Sometimes it is possible for old information to be hidden in the main report database, it is unused and not referred to, but it may be affect reports that show the number of students in a course.

- In such a case, choose the *File/Database/Clean* command use the *Report information without a student* option.

While SM-Reports is very conservative about deleting old information - just in case it is needed - the Clean command is very useful for keeping the database trim.

The Clean Database command clears information from the SM-Reports database that is not used. This can be used to remove students and classes that are old and may not be in use. You must select the types of information that you want to remove from the database. After selecting the options choose OK to begin removing the old information.

If the *Subjects not assigned to any class* option is on, any subject that does not have any classes associated with it, then that subject is deleted from SM-Reports. Warning: do no use this option should not be used when you have outcomes stored in the *Report/Outcomes* command, or the *Report/Definition* commands. Doing so may clear you outcomes and definitions.

If the *Teachers not assigned to any class* option is on, any teacher that is not teaching a class, and is not a head teacher or year adviser is deleted from the SM-Reports database.

If the *Classes without any students* option is on, any classes that are empty, i.e. have no students, are deleted from SM-Reports.

If the *Students without any classes* option is on, any students not in a class are deleted from SM-Reports.

If the *Report information without a student* option is on, old report information is deleted from the SM-Reports. Sometimes old report items can accumulate in the main report file, which may lead to an overflow of internal information. Using this option will clear the old information.

Reusing outcomes

Once a set of outcomes have been entered into SM-Reports there is no need to re-enter them if the same set of reports are produced again and have the same outcomes. There are three ways you can do this from:

- An archive
- Stored outcomes and report definition
- Exported outcomes

Archive

The *File/Archive/Extract outcomes* command will re-read the outcomes from a selected archive and a selected year. To do this you must have made an archive at the end of a set of reports. This is done with the *File/Archive/New* command. An archive is a *snapshot* of all the reports and should be made at the end of each semester. This allows the reprinting of old reports.

When you use the *File/Archive/Extract outcomes* command, the following happens:

1. The selected archive is searched for subjects in the archive that match those in the year of the current database.
2. If a subject is found in the archive that matches a subject shown in the *Report/Outcomes* command any outcomes in the archive are copied into the current database.

The idea behind this command is that if you made an archive at the end of semester one last year, if the outcomes are largely the same in semester one this year, you can extract them and then make any necessary changes in the *Report/Outcomes* command.

- For this to work the subjects shown in the *Report/Outcomes* command of the current database must be identical to those in the archive. If the subjects are different, the outcomes will not be copied from the archive.

Stored outcomes

The *File/Outcomes/Store* command stores all the information in the *Report/Outcomes* and *Report/Definition* commands. You can choose to store the outcomes and report definition at any time and give them any convenient name.

Later you can use the *File/Outcomes/Restore* command to get the outcomes and report definition back. When you choose the *File/Outcomes/Restore* command you must first select the name of the stored outcomes and definition and then you select the year you want restored.

- For the restoring to work, the subjects shown in the *Report/Outcomes* and *Report/Definition* commands must be identical to those that were previously stored. If the subjects are different, the outcomes will not be copied back.

Exported outcomes

The *File/Export/Outcomes* command creates a file of all the outcomes in the *Report/Outcomes* command as a single text file that can later be read back into SM-Reports with the *File/Import/Outcomes* command. The *File/Import/Outcomes* command will read all the outcomes into SM-Reports. If you only want to import specific outcomes you could open the text file and edit or delete the data as necessary.

- Files created with the *File/Export/Outcomes* command can be opened in a word processor such as MS Word for editing or checking, but must be saved as a Text only file before importing back into SM-Reports.
- Exporting and importing outcomes is the most flexible way of reusing a set of outcomes, if you do not need the report definition to be restored. For example, by editing the created file you could export the outcomes from one year and then import them back into a different year. Also, you could also edit the subject names in the exported file if the subject names have changed.

Notes

- With the *File/Archive/New* and *File/Outcomes/Store* commands when you name the archive or the stored outcomes and definition you can enter any name you like. The names can be longer than eight characters and can include punctuation.
- When using the *File/Archive/New* command the archived copy of the database is stored in a subfolder called ARCHIVE that is in the folder where the main database is stored.
- When using the *File/Outcomes/Store* command the copy of the outcomes and report definition is stored in a subfolder called OUTCOMES that is in the folder where the main database is stored.

- With the *File/Export/Outcomes* command you must make a note of the name and where the file is being exported to. SM-Reports allow you to export the file to any location.

To successfully import and export outcomes you must have a copy of SM-Reports dated on, or after, the 10th April 2001. Previous versions of SM-Reports did not export the outcomes in the correct format.

Changing data

Adding new students

When you create a new student in SM-Reports they do not have a *year* until they are put in at least one class. This means that a new student that has just been created will not be visible unless the All Years are selected in the Year selection of the *School/Students* command.

The procedure to follow when adding a new student is:

1. Use the *School/Students* command.
2. Select All years in the year list.
3. Choose New.
4. Enter the details of the new student.
5. Choose Post.
6. Choose OK.
7. Use the *School/Students 'classes* command.
8. Select All years in the year list.
9. Select the student created in steps 1 to 6.
10. Choose Edit.
11. Choose Add.
12. If necessary, select the year of the classes you want the student to be in.
13. Select the classes for the student - you can hold down the Ctrl key to be able to select more than one class while clicking with the mouse.
14. Choose OK.
15. Choose Post.
16. Choose OK.

From this time on the student will appear in any lists for the year that was selected in step 12.

Editing classes

Here are some general techniques for working with classes.

Adding a Subject that is missing

1. Choose the *School/Subjects* command.
2. Choose the New button.
3. Type the course name in the Name line. SM-Reports uses the term subject and course interchangeably. Usually the course name line is what is printed on the report and can be thought of as the subject.
4. Enter a password for the subject. This is a password head teacher may use to access all the classes doing that subject. The password is only shown is using SM-Reports as the Supervisor.
5. Select the subject head teacher from the Head Teacher *drop-down* list.
6. Enter a subject name in the Subject name line. Usually this line can be left blank, unless you are told it must be filled in.
7. Choose the Post button.

8. If you want to create another subject, repeat from step 2.
9. Choose OK after creating all subjects.

Adding a Class that is missing

1. Choose the *School/Classes* command.
2. Select the year the class is in from the *Year drop-down* list.
3. Choose the New button.
4. Type the class code in the Name line.
5. Select the class teacher from the *Teacher drop-down* list.
6. Select the class subject from the *Teacher drop-down* list.
7. If the class is a senior course, enter the number of units in the Units line.
8. Choose the Post button.
9. If you want to create another class in the same year, repeat from step 3.
10. Choose OK after creating all classes.

Remove a student from a class

1. Choose the *School/Class Lists* command.
2. Select the year of the class in the *Year drop-down* list.
3. Scroll though the list on the left and select the class with the unwanted student.
4. Choose the Edit button.
5. Select the student in the details list. If you want to remove more than one student from the class hold down the Ctrl key when clicking on the students with the mouse to select it.
6. Choose the Delete button.
7. Choose the Post button.
8. If you want to delete students from another class, repeat from step 2.
9. Choose OK after removing all the students.

Another way to remove a Student from a class

1. Choose the *School/Students' classes* command.
2. Select the year of the student in the *Year drop-down* list.
3. Scroll though the list on the left and select the student.
4. Choose the Edit button.
5. Select the class in the Student's classes list. If you want to delete more than one class hold down the Ctrl key when clicking on the class with the mouse to select it.
6. Choose the Delete button.
7. Choose the Post button.
8. If you want to delete classes from another student, repeat from step 2.
9. Choose OK after removing all the classes.

File|Report|Edit

The *File|Report|Edit* command allows you to directly change what is in the database for each student, without having to use a work file. This can be convenient for late changes.

- Using the *File|Report|Edit* command is not recommended for classes that are still being updated from teacher work files.

Getting and adding new templates

A template Setup program with instructions is made available on my website: You can visit the specific page, the address of which will be faxed to you, with a web browser connected to the Internet and download the template Setup file.

To install the SM-Reports templates on your hard drive, you then do these steps:

1. Copy the downloaded SETUP.EXE to a diskette, make sure the diskette is not write protected. (Setup must be on a diskette to work properly.)
2. On the computer with SM-Reports, insert the diskette into drive A.
3. At a command prompt, type A:\SETUP.EXE and run the Setup.
4. Follow the prompts.
5. You may have to change the Destination if SM-Reports is not currently installed at C:\SMREPORT.
6. Follow the prompts until installation is complete.
7. Start SM-Reports, leaving the diskette in drive A.
8. Use the *Reports|Advanced|Update templates* command.

Then refer to the *Help|School Information* command for details on using the templates.

- If after installing the templates there are no new topics in the *Help|School information* command, you should run the Setup again and make sure the destination is correct in step 4 of the installation.

Be sure to print and follow the instructions on the above listed web page and to read the topics in the *Help|School information that are also updated. These topics have been updated:*

Spell checking the entire year

After all the work files have been done and the database updated with the information in them, you can spell check an entire year by doing the following:

1. Choose the *File|Report|Edit* command.
2. Select the year.
3. Choose the All button.

Printing

Text not fitting

When a page is sent to the printer several actions occur depending on the actual printer being used and the settings of the printer. For example, looking in the Printers folder of My Computer and right clicking on the Properties, there is usually a groups of settings called Fonts. On the printer here, there are these settings:

- Print as graphics
- Download as bitmap
- Download as outline
- Screen font substitution
- Prefer printer fonts

The settings on your printer will be different, but the principle to understand is that once the information for the report is sent to the printer, several actions can occur to the fonts which may result in the actual printed page being different depending on what printer is being used.

- For this reason it is important to print a least one draft copy of the reports on the printer you plan to use for the final print run. Doing this early in the reporting process will help prevent any surprises later.

There are two possible solutions:

1. Get template adjusted to suit the way it prints on the final printer. This is usually the best solution.

OR

2. Try using the Scale option in the *Print/Page setup* command. Numbers less than 1.0 will decrease the printed font size. For example, entering 0.9 makes all text 90% of the original size. Experimenting with different values for the Scale can be useful in making the final report look more like the print preview.

Bottom of page not fitting

If the printed report is not properly centred on the page, you can adjust it by doing the following:

1. Choose the *Print/Report Page Setup* command.
2. Enter an appropriate number in the Left offset.
3. Enter an appropriate number in the Top offset.
4. Choose OK.

The numbers entered here specify, in millimetres, how much to shift the printed area to the right and down the page to correctly centre the report. To shift the printed area to the left or up the page, negative values can be entered.

No ticks

There are several reasons why a report that has ticks to represent a student's level of achievement in an outcome may not appear. By following the steps here, you can discover the cause of the problem. To do this it is important to pick a single student in a particular class that you expect to be see ticks for, and to work through the steps for that student.

Work File empty

1. Choose the *File/Open* command from the main SM-Reports program.
2. Select and open the work file that has the student in the class.
3. Select the class.

4. Look in the columns for the outcomes. For the first outcome column that you know is not printing, make a note of what is entered in the cell and the heading of the column for the student.
5. Close the work file.
 - If the work file is empty has information been entered for the student, or have you opened an incorrect work file?

Work File not updated

6. Choose the *File/Report/View* command.
7. Select and year and the student.
8. Look on the row for the class and scroll across to the column that was noted in step 4.
9. Click on the cell and check that the expected information is present.
10. Close the File Report View.
 - If the information is not present, have you updated from the work file with the *File/Report/Update* command?

Incorrect columns

11. Choose the *Help/School information* command and print the help topics for the entering of the outcomes and/or defining of the work file.
12. Choose the *Report/Definition* command.
13. Select the year and the subject for the class that has the student.
14. In the Details list scroll down to the outcome heading that was noted in step 4.
15. Right click on the option for the outcome.
16. Next to the title of the Definition Details pop-up box is the SM-Reports name for the option. (The name is the internal name used by SM-Reports for each column in a work file and is not always the same as the headings.)
17. Check that the name in step 16 matches what is required from the topics in step 11.
18. Close the Definition Details and Report Definition.
 - If the columns used in the Report Definition do not match the School information topics, the reports will not print correctly because the template will not be able to get the information from the correct columns.
 - If there are extensive differences you may need to redo the setting up of the outcomes and report definition from the beginning. Contacting SMPCS is recommended in that situation.

Number of levels not set

19. Choose the *Report/Definition* command.
20. Select the year and the subject for the class that has the student.
21. In the Details list scroll down to the outcome heading that was noted in step 4.
22. Right click on the option for the outcome.
23. In the Graph section note the number in the Number of levels box.
24. Check that the number in step 23 matches what is required from the topics in step 11.
25. Close the Definition Details and Report Definition.
 - If the Number of levels is not set for any option in the report definition, the ticks will not appear. If an incorrect number is set the ticks may appear but will not be correctly aligned on the report.
 - If the Number of levels needs adjusting, you can make the changes in SM-Reports without affecting any work files that are in use. The work files do not need any special treatment in this case.

Letter mapping

SM-Reports only understands numbers to represent the ticks on a report. If in step 4 you noted a letter, word, or phrase to represent the level of achievement this section applies to you.

26. Choose the *Report/Advanced/Letter map* command.

If single letters are being entered in the work files follow steps 28 to 30, otherwise follow steps 31 to 33.

27. Select the year for the class that has the student.

28. In the Letter section select each letter being used.

29. Check that the Map to box shows an appropriate number for the level.

30. In the Word Map area note the cells in the From column.

31. Check that there is a cell that matches the information from step 4.

32. Check that the Map to column has an appropriate number for the level.

33. Check that the Start and End columns are 1 and 30 respectively, unless they are specified as different values in the topics from step 11.

34. Close the Letter map.

- If the Letter or Word map needs adjusting, you can make the changes in SM-Reports without affecting any work files that are in use. The work files do not need any special treatment in this case.

No outcomes

If the outcomes do not appear on a report when the *Print/Reports* command is used, you can follow the steps here to discover the cause of the problem.

Outcomes not entered

1. Choose the *Print/Outcomes* command.
2. Select the subjects that do not show outcomes on a report.
3. Choose OK.
4. Check that the outcomes are listed.
5. Close the print preview.

Before doing this you can make sure the *Preview print commands* option is turned on in the *Options/General* command as there is no need to actually print the pages when doing this check.

- If the outcomes are in the print preview, check that the numbers shown in the first column match those that are specified in the relevant Entering the outcomes topic of the *Help/School information* command.

Report Definition not fully set

6. Choose the *Report/Definition* command.
7. Select the year for the reports.
8. Select a subject that does not have outcomes on the report.
9. Scroll in the Details list to one of the outcomes.
10. Right click on the outcome and check that the Automatic outcomes option is turned on.
11. Close the Definition Details and the Report Definition.

- Outcome based reports require the option in step 10 to be turned on for each option in the report definition that prints an outcome.

- If the *Automatic outcomes* option is off for all outcomes in the report definition you will need to redo some of the report definition steps. Contacting SMPCS is recommended in that situation to determine the best way to do this.

Print two reports in final print

If there are students that need two reports printed because there are two addresses for the parents, you can do this.

1. Choose the *School/Students* command.
2. Select a year.
3. Select a student that needs two reports.
4. Choose Edit.
5. Turn on the *Print two reports in final print* option.
6. Choose Post.
7. Repeat steps 3 to 6 for each student.
8. Choose OK.

Then when you are ready to print the final set of reports:

- Turn on the *Final print* option in the *Print/Reports* command.

Students with subjects in other years

In the *Options/General* command the *Print subjects in other years* option can be turned on to allow pages from years other than the one being printed are included in a student's report.

Roll class, cover page, subject order

Usually SM-Reports assumes that the template used for the cover of a report is set to the Roll class (or homeroom etc.) subject in the *Report/Definition* command.

This means that roll class subject must be the first subject in the *Report/Subject order* command. The remaining subjects are ordered in the same order that they are to print on the reports.

If you have the roll class subject appearing in the table of subjects it usually means that it is not at the top of the list in the *Report/Subject order* command. (Some templates require the *Ignore subject* option to be turned on for the Roll class subject, but this is unusual and would be specified in the *Help/School information is required.*)

- The roll class subject must have *Ignore subject* off for this subject and in the *Report/Subject order* command should have the roll class as the top subject.
- In the *Report/Subject order* command, all subjects stored in SM-Reports are listed. It is the relative order that is important, so it is meant to show all the subjects. Provided you put all the roll class subjects at the top and then the English subjects etc. When printing a report, SM-Reports start at the top of the list for each student and skips over subjects that are not being studied when determining the order of the subjects in the printed page.
- For some styles of template in the *School/Subjects* command should have the *Used for cover or roll class* option turned on for the subject being used for the cover.

Outcomes that don't fit in a box

Sometimes SM-Reports estimates the number of lines required for an outcome to print, but because of the magic that happens inside the printer, the text make take more room than expected. This can make a new line. There is a solution where you tell SM-Reports that another line is needed.

For any subject that has an outcomes SM-Reports does not correctly adjust the size of the area for the text you can do the following:

- In the *Report/Definition* command right click on the outcome that requires an extra line. Turn on the *Extra line* option and choose OK. Repeat this for any outcome that requires more space to print.

Using printers with a separate paper bin for the cover.

In the *Print/Reports* command the *Use advanced printer* option can be turned on to send each student report as a separate print job to allow a printer to do clever tricks based on the beginning and end of each print job. This can allow the first page to use paper from a different paper bin.

Problems

Cannot open locked database

When running copies of SM-Reports dated on and after the 21st of August 2002 you may see the following message if more than one person tries to access the main database at the same time.

```
Cannot open database because it is locked by another user.
```

This message can also occur if SM-Reports was not fully closed the previous time it was used.

How locking works

When SM-Reports is run and a database is opened a file named LOCK.TXT is created in the same folder as the SDB files that are the SM-Reports database.

If another person tries to open the same database and the file LOCK.TXT is already present then that database cannot be opened and the above message is shown. The same occurs when a database is opened with the *File/Database/Use* command.

When you exit from SM-Reports, or switch to another database, the LOCK.TXT file is deleted to indicate that the database is now available for use.

Unexpected lock

If the message indicating that the database is locked appears and you are certain that no one else is using SM-Reports, the following may have occurred.

- SM-Reports has previously unexpectedly shutdown and the LOCK.TXT file was not deleted. In this case, you can use Windows Explorer or My Computer to display the folder with the SM-Reports database and then delete the LOCK.TXT file.

Before doing this, be absolutely sure that no one else could be using SM-Reports as the Supervisor or Administrator.

Why are classes incomplete?

The *File/Report/Information* command compares the options turned on in the Details list of the *Report/Definition* command with the information that is currently in the main database.

If when you use the *File/Report/Information* command classes are listed that you expect are finished, it may mean:

- That an option in the *Report/Definition* command is allowed to be empty, but SM-Reports is treating the empty field in the database as missing information.
- That additional unneeded options have been accidentally turned on in the *Report/Definition* command.

To check these possibilities, in the *File/Report/Information* command note the name and class of a student that is shown as incomplete.

Then in the *File/Report/View* command display the student noted. Click on the cell for the row with the class in question. Then by pressing the Tab key you can move across the row while watching the headings. Any column that has N/A in the heading need not be filled (according to the report definition), but any column with a name is turned on in the report definition and will make the class show as incomplete in the *File/Report/Information* command. See if you can find the empty cell that also has a heading.

If the column is not meant to be turned on you can turn it off in the *Report/Definition* command.

1. Choose the *Report/Definition* command.
2. Select the year.
3. Select the subject of the class.
4. Click on the option in the Details list to turn it off.
5. Choose OK.

If the column is meant to be on but is allowed to be empty the *Optional entry* option in the *Report/Definition* will make the *File/Report/Information* command ignore that column when determining the incomplete classes.

1. Choose the *Report/Definition* command.
2. Select the year.
3. Select the subject of the class.
4. Right click on the option in the Details list.
5. Turn on *Optional Entry*.
6. Choose OK.
7. Choose OK.

If you need to turn the *Optional entry* option on for all subjects, you can use a set of steps like these.

1. Choose the *Report/Definition* command.
2. Select the year.
3. Select the subject.
4. Right click on the option in the Details list.
5. Turn on *Optional Entry*.
6. Choose OK.
7. Choose Copy.
8. Choose All.
9. Select the option, *Only the previously edited strand*.
10. Choose OK.
11. Choose OK.

If you do these steps, you may need to choose the Roll class or Homeroom subject and turn off the option, as it is probably not needed for that subject.

Recovering a bad work file

If there is a problem opening a work file it is usually one on a diskette. With a work file that is on a bad diskette the steps to follow are:

1. Run Scandisk on the diskette to fix any errors.
2. Copy the work file off the diskette into a convenient folder on your system.
3. In SM-Reports use the *Tools/Repair work file* command on the copy of the files made in step 2.

If these steps cannot resurrect the file, the last step is to email it to technical support. Occasionally it is possible to get information out of a bad work file even when the *Tools/Repair work file* command has not been effective.

- If you are emailing a damaged work file, use the *File/New* command with all options off to made work file from the same year that can be used for comparison.

Work files that don't update Tag classes

When the *File/Report/Update* command is used on a work file a flag is set in the work file to stop the same data from being read again.

If a class in a work file won't update is the following procedure you can use to allow a work file to be updated from again. If for

any reason you need to repeat an update from specific classes in a work file, you can use the following steps:

1. Open the work file that has the class that needs updating with the *File/Open* command of the main SM-Reports program.
2. Select the class.
3. Choose the *Tools/Tag class as modified* command and choose Yes.
4. Choose Save.
5. If there is more than one work file that needs those you can use the *File/Open* command from the SM-Reports Work File program and select another work file and repeat steps 2 to 4.
6. Close the work file program.
7. Choose the *File/Report/Update* command on the work file.

If several work files will not update, a solution should be the *Tools/Advanced/Force update* command. This command is not for general use, but may help if you are updating from individual teacher work files. Contacting technical support is recommended before using this command.

If you need to use the Tag class technique, or the Force update command on more than a couple of work files, please let me know as it many indicate some other problem.

Getting technical support sending ZIP files

Some questions asked about SM-Reports are difficult to answer without having access to the data being used. The *File/Database/Zip up* command is designed for these times.

- The *File/Database/Zip up* command makes a single ZIP file on diskette.

A ZIP file contains a compressed copy of the database. By emailing it to technical support with details of the student whose report needs checking or the command that is not working as expected, usually a prompt answer can be found.

Program thinks it is a trial copy

This is a new licensing file that replaces the old SETUP.DAT. If you copy it into the folder with the SM-Reports program and download any updates from my website they will be licensed in the school name.

When SM-Reports starts up a check is made for a special licensing file named REGISTER.KEY in the same folder as the main program. If this file is absent or incorrect, SM-Reports will indicate that it is a 30 day trial copy only.

- If this occurs, you can copy the required REGISTER.KEY file from the RUNIMAGE folder of the CDR that SM-Reports was supplied from.
- If your copy of SM-Reports was downloaded from the Internet you can request a new licensing file from technical support by email.

With a new template the help is not updated

When a new template is supplied as a Setup program a new help file is included that explains how to use the template. This help file is shown by choosing the *Help/School information* command.

If after installing a new template the information in the *Help/School information* command does not include the required help topics this means the destination of the Setup program was not the same as the main program.

- When running a template Setup program it is essential that the destination is set to where the SMREPORT.EXE program is located.

The destination when running the Setup program is where the SCHLINFO.HLP is copied. This is the file that has the *Help/School information topics*.

If you have run the template Setup program with a known location for the destination such as C:\SMREPORT you could manually copy the SCHLINFO.HLP file into the correct folder.

Tools|Advanced|Quick fix command.

The *Tools|Advanced|Quick fix* command checks the internal consistency of the database and is able to fix most error.

- If for any reason you get a GetRecord or GetField error when doing an action, it usually means there is some unexpected data causing the problem and the above command can usually fix it.