EKHO SCHOOL MANAGEMENT SYSTEM

Guided Tour

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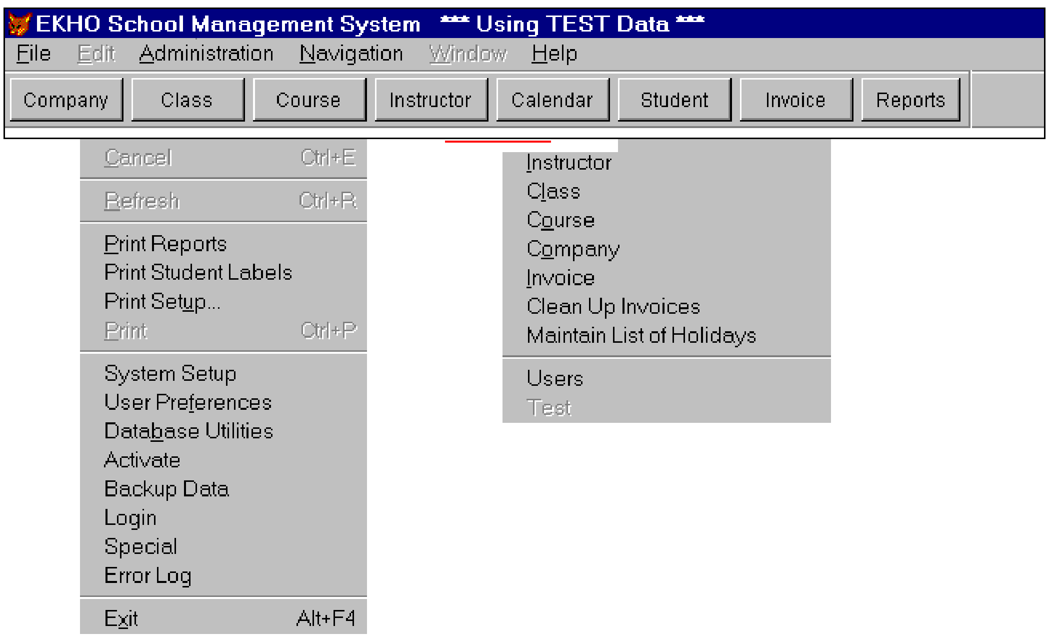
A TOUR OF THE SYSTEM

For the following tour, you should follow along with the EKHO SMS running, using the test data supplied. The tour will take you through the various forms and activities of the SMS. Features of the user interface will be explored.

Get the system running by selecting the EKHO SMS system from the Start taskbar. You may get asked to login. If so, login as the *administrator* user name (the password is *admin* unless you changed it after installation, as instructed). When it has started, you will have a screen with a menu across the top and just below that, the taskbar. The main menu and taskbar are shown below, along with the File and Administration menus.

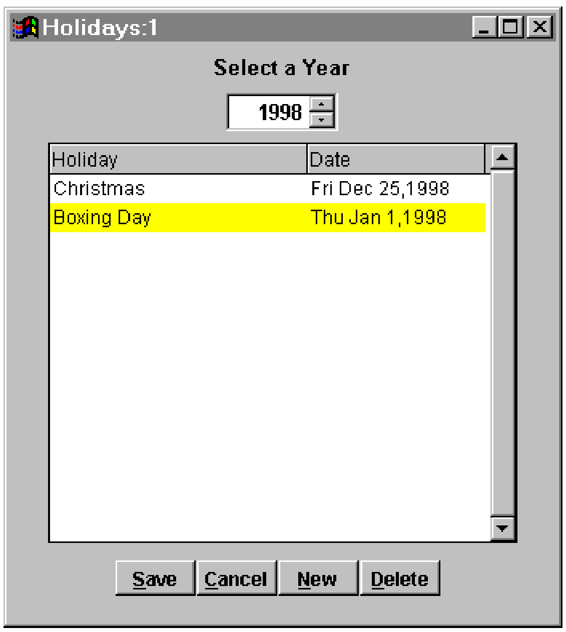


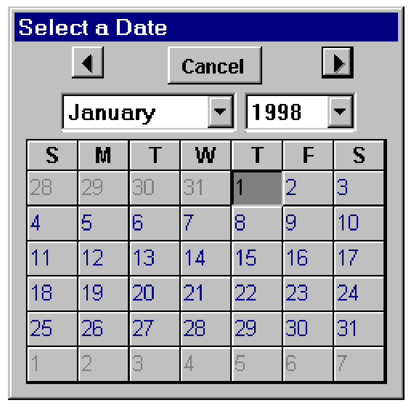
Select **User Preferences** from the **File** menu, then click on the **Use Test Data** check box so that the system is accessing the data we have supplied. Remember to uncheck this when you want to start working with your own data.

The toolbar is a quick way to access the most commonly used items on the Administration menu. The Edit menu, which is shown disabled, is used to cut and paste text on forms. The Window menu is used to select among forms on the screen if some are hidden behind others – you can have several forms on the screen at once. The Navigation menu provides a method of moving through the records displayed on a form, although each form will have a set of navigation buttons on it for this purpose.

1. The Holidays Form

We will first explore the Holidays form, used to tell the system about those days that you will be closed. Click on the **Administration** menu, then select the **Maintain List of Holidays** item to bring up the form. The **spinner** at the top lets you select the year for which you want to schedule holidays. Clicking on the arrows increases or decreases the year, or you can click on the date field and enter a year directly. Select 1998. You will see that we have already scheduled Christmas, but you want to close on Boxing Day as well. Click the **New** button, and another line will appear on the form. Type the name of the holiday ("Boxing Day") in the field where it says "Description", then double-click on the date field to bring up a calendar that you can use to select the date for the holiday.





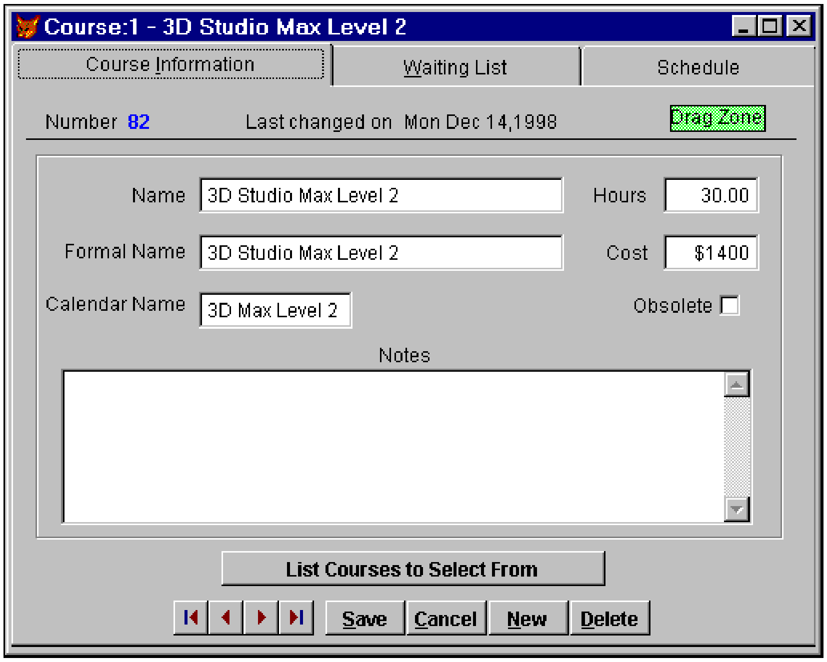
Select the month (December) and year (1998) from the calendar by using the left and right arrows to move one month at a time, or click on the arrows on the month and year fields to select directly. Click on the day (the 28th); the calendar will close, and the date will appear on the form. Note that you can only select dates in the year for which you are scheduling holidays. Click **Save** to save your changes. On all forms, you must save in order for your changes to take effect. If you try to close the form, or move to another record, the system will ask you if you want to save your changes first.

Anywhere in the system that you need to enter a date, double-clicking on the date field will bring up a calendar. Rather than bringing up a calendar to change a date field, you can use the **plus** and **minus** keys to change the days, the **PgUp** and **PgDn** keys to change the months, and **Ctrl-PgUp** and **Ctrl-PgDn** to change the years.

Now close the Holidays form by clicking on the close box in the top right corner of the form (it has an "**X**" in it).

2. The Course Form

Now that we have noted when you are **not** working, let's set up some things for you to do when you are. Click on the **Course** button on the toolbar to bring up the course form.



The **title bar** of the form shows the name of the form, a number showing which copy of the form this is (you can have several course forms open at once), and the name of the course. Below that is the course number, the date this record was last changed, and a green box labelled "Drag Zone". Several forms have this. It is used when you want to "drag and drop" information from one form to another. For example, you can drop a course onto the calendar form, and the calendar will then show only the classes scheduled for that course. We will explore drag and drop later.

There are three names shown for the course. When you create a new course and fill in the **Name** field, the other two name fields will be filled in with the same value. The **Name** field is the name that you will use when selecting this course in other forms; it can be an abbreviated name. The **Formal Name** field is used on certificates and other places where the full name should be used. The **Calendar Name** will be used on the calendar form and printout. Since there is limited space, a shorter name is necessary. The size of the field on the form is about right. If the name you enter fits in the box, it should fit the calendar. Check it by examining the calendar form and a printout of the calendar, and adjust if necessary.

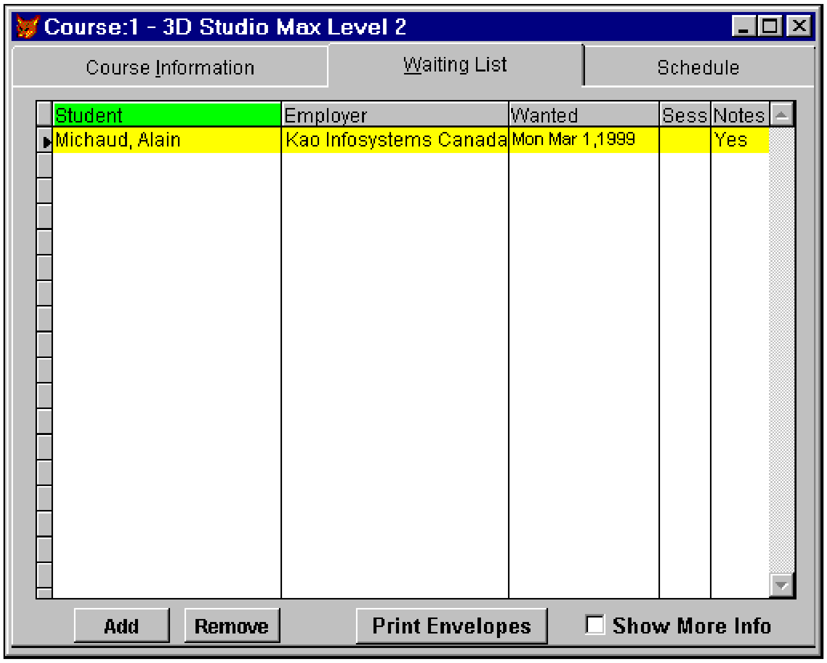
The **Hours** field must be filled in. It is the number of hours that this course requires. The system assumes that a full day is 7.5 hours, and that morning, afternoon, or evening sessions are 3.75 hours (a half-day), thus the amount you enter should be a multiple of half or full days. The calendar uses this information to tell you if you have scheduled enough sessions for a class.

The **Cost** field is used by the invoicing module to provide a default for the cost.

The **obsolete** box, when checked, prevents this course from appearing in the list of courses that other forms display for you to select from. Rather than deleting a course when you no longer offer it, mark it as obsolete.

The **List Courses to Select From** button will drop down a list of all the courses; click on the one you want and it will be displayed. You can use the navigation arrows to display the other courses as well.

Now click on the **Waiting List** tab.

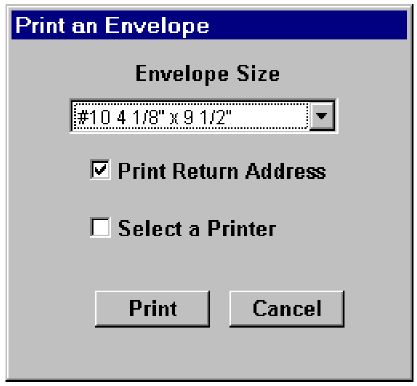


This is a **grid** showing the people who want to take the course some time in the future. The **Wanted** field is when the person wants to take the course. It is a date field, thus double-clicking will bring up a calendar. The **session** field shows the time of day wanted – day, AM, PM, or Evening. Clicking in this field displays a list to chose from. If the time is not important, it can be left blank. Clicking on the **notes** field brings up a window into which you can type additional information. This can be used to note when you have contacted the person, for example.

Clicking on the headers at the top of the grid ("student", "Employer", …) will sort the grid on that column. The header of the column upon which the grid is sorted is highlighted in green.

If you **right-click** on a field in a grid, a small menu may pop up, allowing you to perform some action on the field selected. If you right-click on an employer, a menu pops up ("Edit this Item") allowing you to bring up the Company form for that employer. If you right click on a student, a menu allows you to bring up the student form for the student, print an envelope for the person, or to display a small form that has the student's name, employer, home and work phone numbers. This is handy when you are using the waitlist for marketing purposes. Clicking on the **Show More Info** box brings up this same information form, but the form will stay up and change as you select different students in the grid.

The **Print Envelopes** button brings up a small form that allows you to print envelopes for everyone on the waitlist. Selecting **Print an Envelope** from the right-click menu brings up the same form, but will only print one envelope.

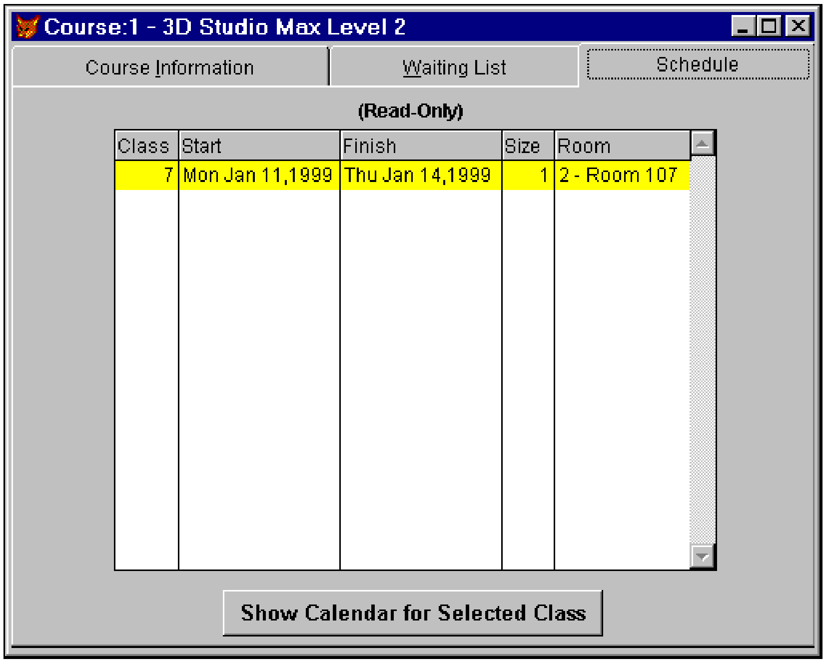


This form allows you to select an envelope size (the default is the one you set up in the **System Setup** form during installation). You can chose to have your return address printed or not. Checking the **Select a Printer** box will cause a Windows printer selection dialog box to appear before printing occurs. This allows you to select a different printer for envelopes. Click on the **Print** button to print the envelope(s).

Note that you may have to use the **System Setup** form to fine-tune the positioning of the addresses on the envelopes.

You can remove people from the wait list by selecting the person in the list (click on the name, or use the arrow keys on the keyboard), then clicking on the **Remove** button. You will always be asked to confirm delete operations – just in case.

The **Schedule** tab brings up a page showing the classes that are scheduled for this course.



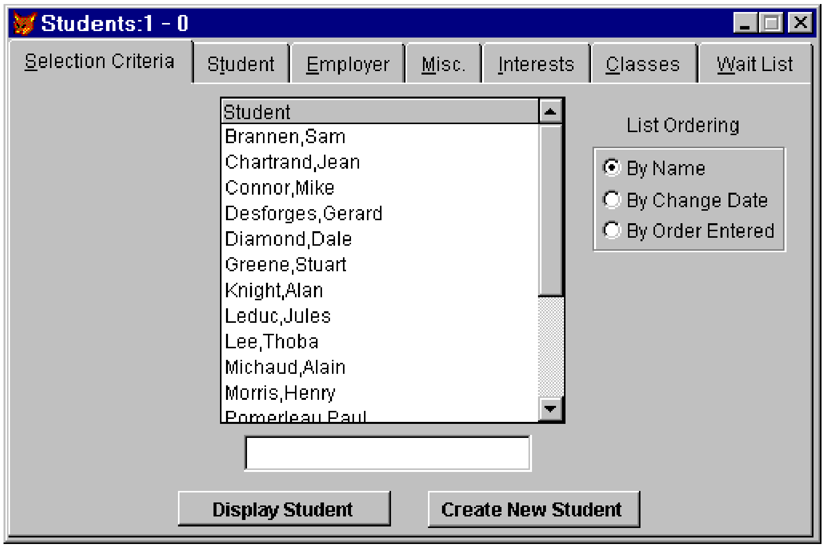
Only classes with a start date later that 30 days ago are shown. Right-clicking on the class number will pop up a menu allowing you to display the class form. You can show the calendar form for the selected class by selecting the class and then clicking the button at the bottom of the page.

Note that this table is read-only. You cannot change it.

Close the Course form by clicking on the close button (the **X** in the top right corner).

3. The Student Form

Click on the **Student** button on the toolbar (or select **Student** from the **Administration** menu) to get the student form.

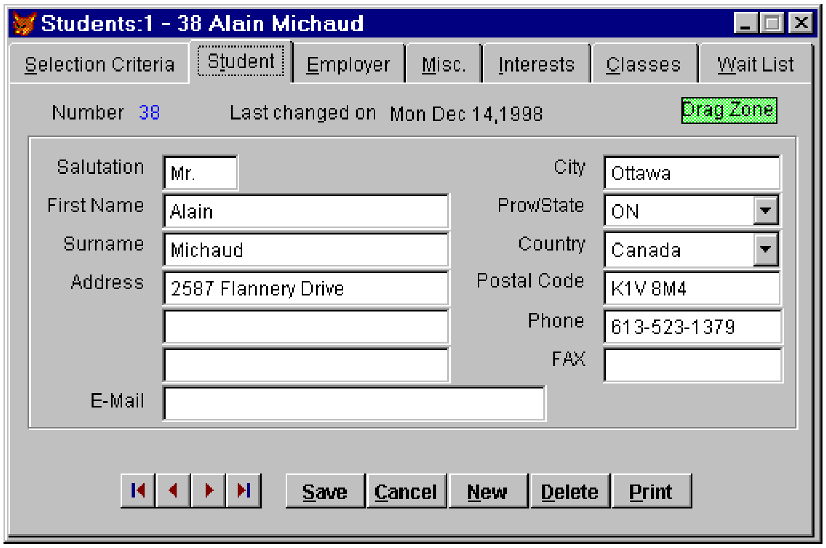


The first page is used to select a student to process. There is a list of students from which you can select by clicking in the list, then using the slider bar at the right, or the arrow keys to move to the desired student. Then double-click with the mouse or click on the **Display Student** button. Or you can click in the box just below the list, and start typing the surname of the student. As you type, the system will fill in the first name on the list that matches the letters you have typed, and the list will highlight the name in yellow. When you have typed enough to select the desired student, press the **Enter** key, or click on the **Display Student** button. If you need to type more than just the surname (the Smiths come to mind!), follow the surname with a comma, then start typing the first name (don't type a space after the comma).

The list's default order is alphabetic by surname and first name. By clicking on one of the buttons on the **List Ordering** box, you can have the list ordered by the date that the records were changed (it lists the newest date first). This is useful if you want to see what has been changed recently. You can see the list displayed in the order in which the students were entered, the most recent first. This is useful to get access to new students.

To create a new student, click the **Create New Student** button. You will be asked if you have checked to make sure the person has not already been entered. You should first check the name in the list – you don't want to have duplicate entries.

After selecting a student, or asking to create a new one, the Student page will appear.



Note that the title bar contains the name of the form, and the number and name of the student. The student number and the change date appear next, along with a drag zone box that can be used to drop a student on another form (such as the course form waiting list). Let's try this. Bring up the Course form's Wait List page, and move it so that both forms are visible on the screen. Position the mouse over the green **Drag Zone** box, hold the left mouse button down; the cursor will change to the drag-drop cursor – an arrow with a plus sign. Now move the mouse (keep the left button down) over the wait list. When the mouse is over the grid on the wait list, the grid background will turn **green** - this is the system's way of informing you that this is a valid place to drop whatever it is that you are dragging. If you drag something that is not valid (such as dragging a course over the wait list), the background will turn red. Now that the mouse is over the green wait list, release the mouse button, and the student will now appear in the wait list.

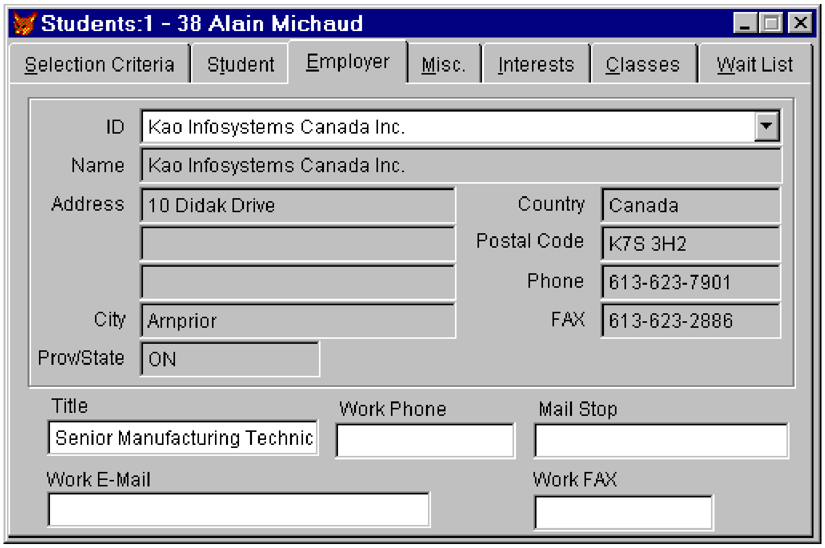
To change a field, click on it with the mouse, or use the **Tab** keys to move to it. Note that when you do this, field changes colour – white on a dark blue background. This shows that the text has been **selected**, and anything you type will replace the selected text. Using the mouse, you can select only part of a field to change. Of course, you need to save your changes.

Note that the **Prov/State** and **Country** fields will pop up a list from which you can make a selection either with the mouse, or by typing the first few letters.

The navigation arrows at the bottom left let you move through the student in the order that they appear in the list on the selection page.

The **Print** button will bring up a small menu that allows you to print an envelope for the student. (The other items on this menu haven't been implemented yet).

Now bring up the **Employer** page.



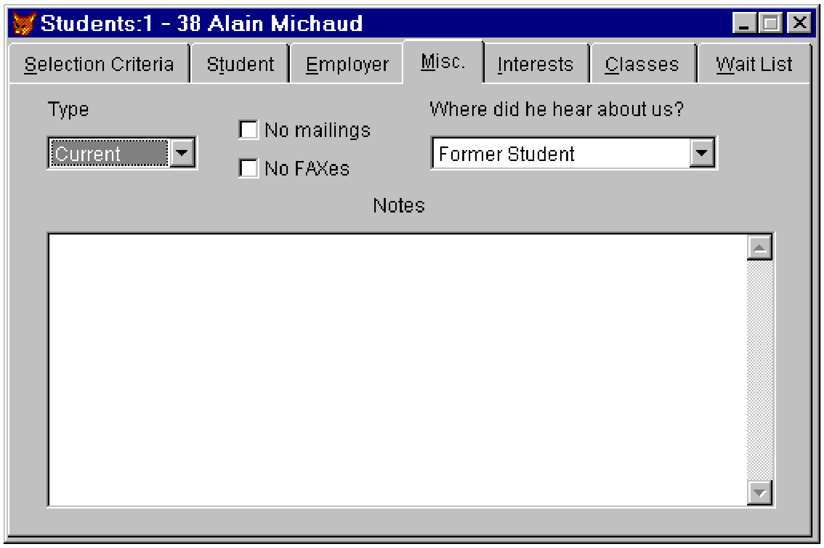
It shows information about the student's employer. Note that most of the fields on this page have a grey background; this indicates that you cannot enter data into these fields.

Clicking on the **ID** field displays a pop-up list of possible employers; at the very top of the list are three special ones: **(none), (unemployed)** and **(self-employed).**

The fields at the bottom of the page, such as **Title**, contain information about the student pertaining to the work environment.

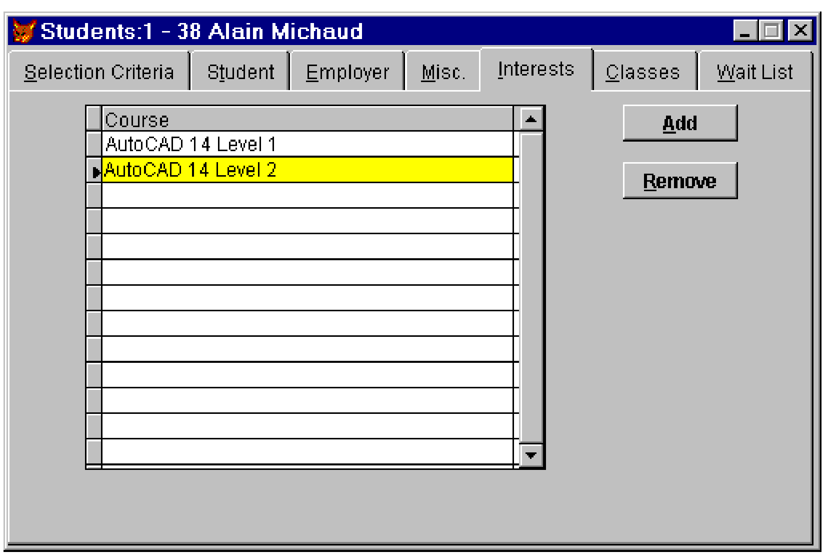
After making changes to this page (or any other), you must save the student record by using the **Save** button on the **Student** page. Or you can use a shortcut for saving – use the **Ctrl-S** key combination. **Ctrl-E** (for Escape) can be used to cancel your changes

The **Misc.** page is shown below.



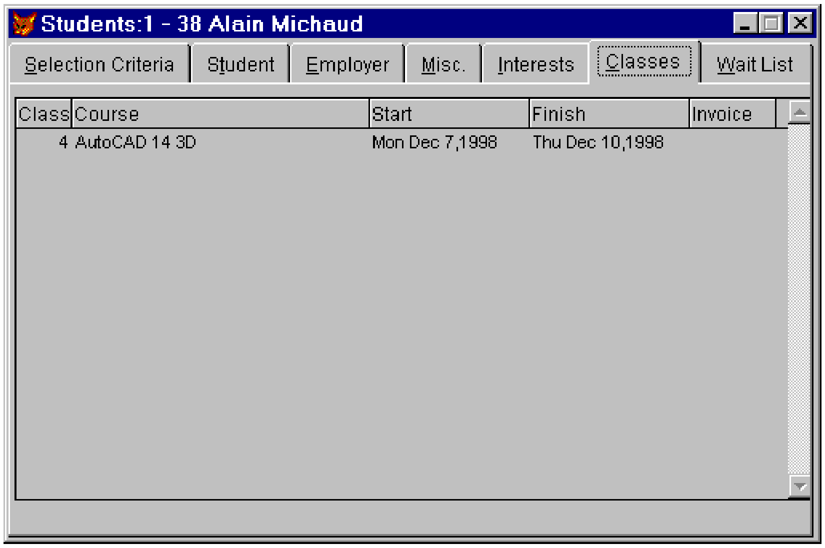
It displays addition student information. You can use the **Type** field to note whether a student is a current, former, or prospective student. We don't make use of this information at present. You can prevent the student from being sent mailings or faxes when you use other modules in the system to send mass mailings or faxes to your students. You can track where the student heard about your school. Select an item from the list, or if you want to add a new item, just type it into the field directly. The new item will be kept in the list for future use. The system does not currently make use of this information.

The **Interests** page lets you note in which courses the student has expressed an interest.



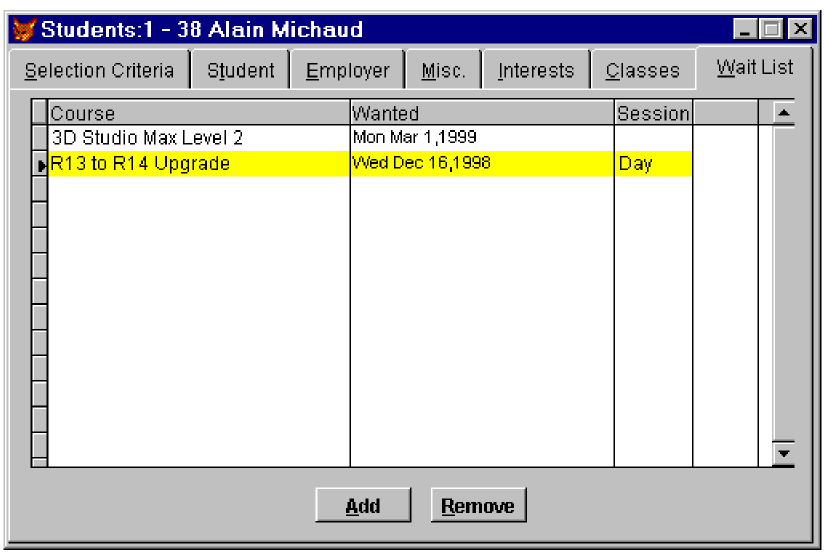
The **Add** button brings up a list of courses from which you can select. Remove a course from the interest list by selecting it in the list, then clicking the **Remove** button.

The **Classes** page shows the classes for which this student is registered.



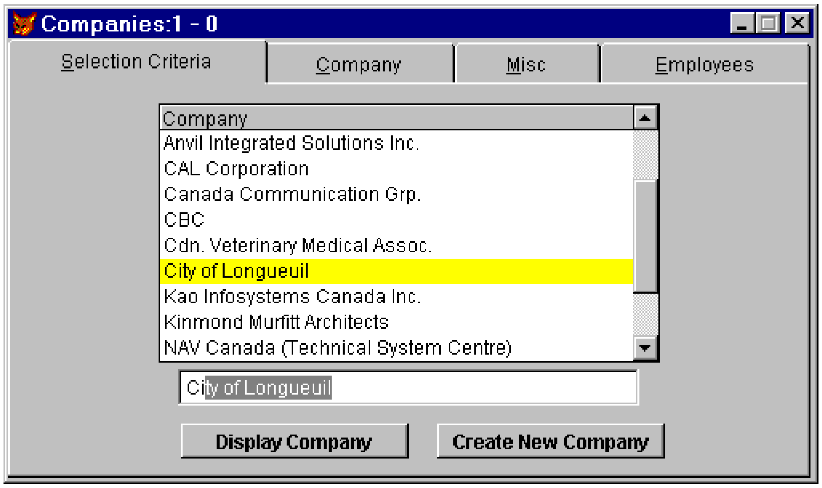
Note that the fields all have a grey background, indicating that you can't change any of this data. However, you can right-click on a course or class to bring up a small menu that allows you to display the course or class editing forms. If the student has been invoiced for this course, the invoice number will be shown.

The **Wait List** page shows the courses that this student wishes to take in the future. It is much the same as the wait list on the Course form.

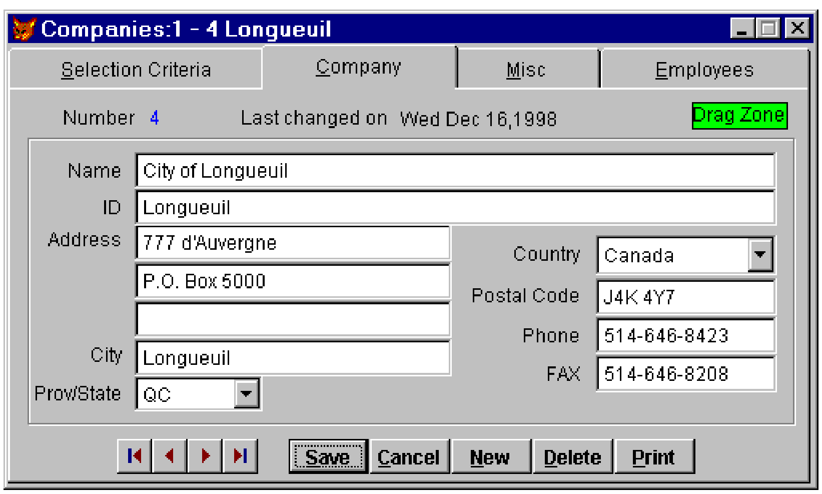


The **Wanted** field will display a popup calendar if you double-click on it. The **Add** button displays a list of courses, and the **Remove** button will remove the highlighted course entry.

4. The Company Form



This form is very similar to the Student form we just explored. The **Selection** page, above, works the same way.



The **Company** page has both a **Name** and an **ID** field; when you create a new company, the ID field will be filled in automatically with the contents of the Name field. The ID field is used in other forms (such as the Student form's Employer page) to select a company. The Name field should be the formal name of the company. The ID field could be an abbreviation, or used to distinguish several divisions or departments of a large company, to make is easy for you to find in a popup list.

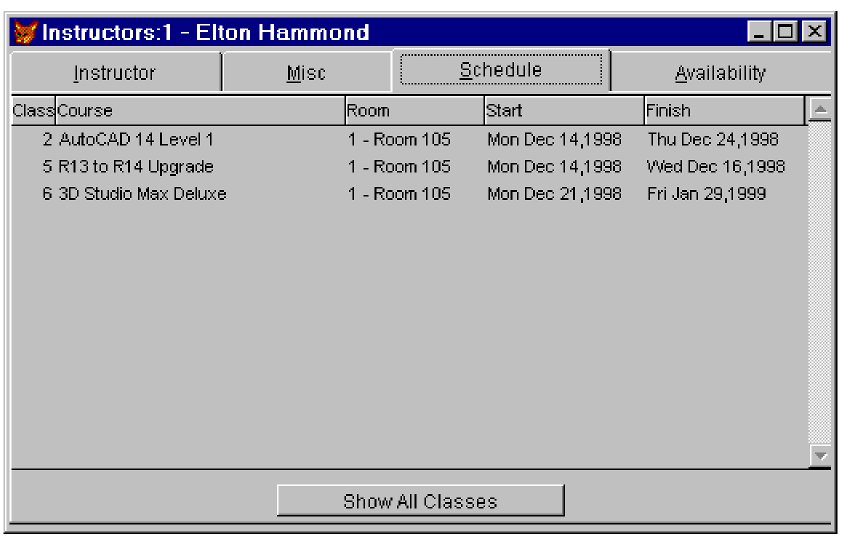
The **Misc** page has additional details. The **Employees** page displays a list of the students that are employed by this company. You can't change anything on this page, but right-clicking on the name of a student allows you to bring up the student editing form for that student.

5. The Instructor Form

This form is used to maintain the list of instructors at your school. You can use the navigation buttons to move through the instructors, or you can click on the **List Instructors to Select From** button for a popup list.

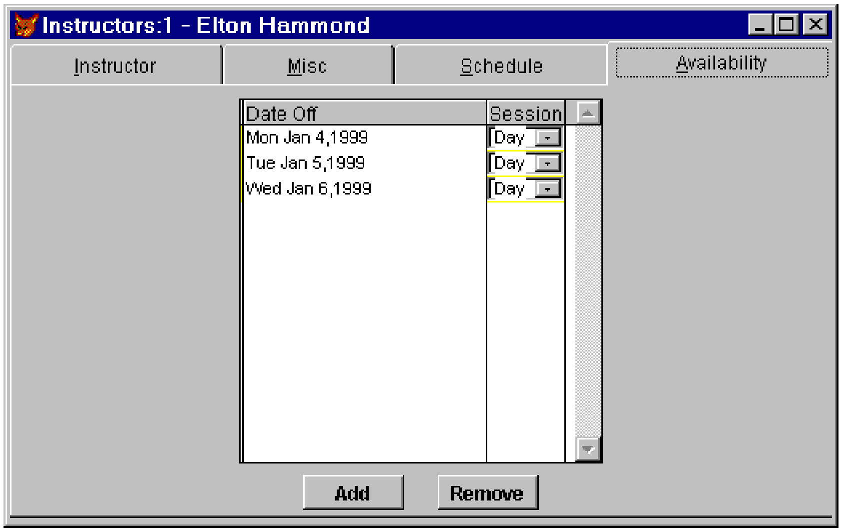
The **Misc** page lets you record information regarding courses the instructor could teach, plus a general notes field.

The **Schedule** page shows the class the instructor is (or has been) scheduled to teach.



Right-clicking on the Class or Course fields allows you to bring up the Class or Course forms. The schedule only show recent and future classes; clicking on the **Show All Classes** button will show all the past classes for this instructor as well.

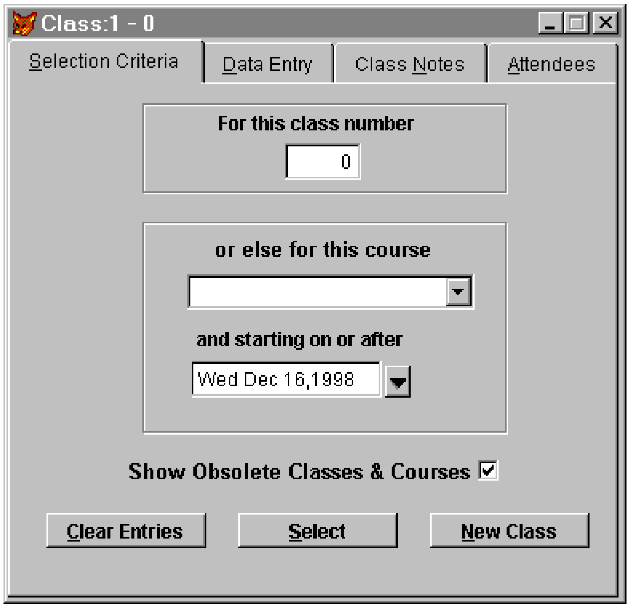
The **Availability** page show the dates that the instructor has booked off.

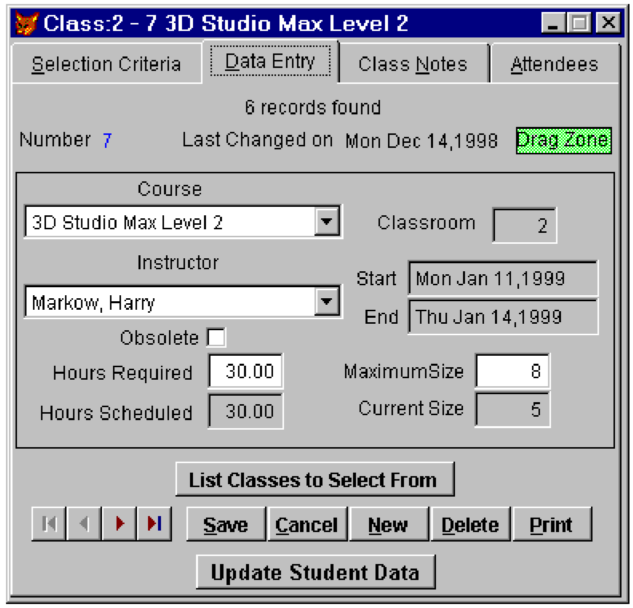


The **Date** field will pop up a calendar upon double-clicking. You can select a session (Day, AM, …) for which the instructor is unavailable. Currently the system does not use it. It uses the date only, to block off the day on the calendar. A future release will use the session information, as well as allowing a more flexible method of specifying the time off, such as a range of dates, or "Every Monday".

The **Add** button adds an item to the list, with today's date. Edit the date as necessary. The **Remove** button will remove the highlighted date.

6. The Class Form





The **Selection Criteria** page lets you select classes to display in different ways. If you enter a class number, that class will be displayed. If the class number is left as zero, then you can select classes based upon the course they are for, or the starting date (or both). The course popup will give you a list of courses and the date popup will give you a calendar. The **Show Obsolete Classes & Courses** check box allows you to see all courses and classes, or it will filter out those that are obsolete. If a course is obsolete, all the classes for that course are also obsolete. Turning this off makes the list of classes you are working with smaller, as you are now looking at only those classes that are current.

The **Clear** button will clear out all the criteria so you can start again. If you leave the fields all empty, all classes will be available for editing. When you have entered your criteria, click the **Select** button to go to page 2, the Data Entry page. The **New Class** button will bring up a blank Data Entry page.

At the top of the Data Entry page you are shown the number of classes that met the selection criteria. The **List Classes to Select From** button or the navigation buttons can be used to move through the records that were selected.

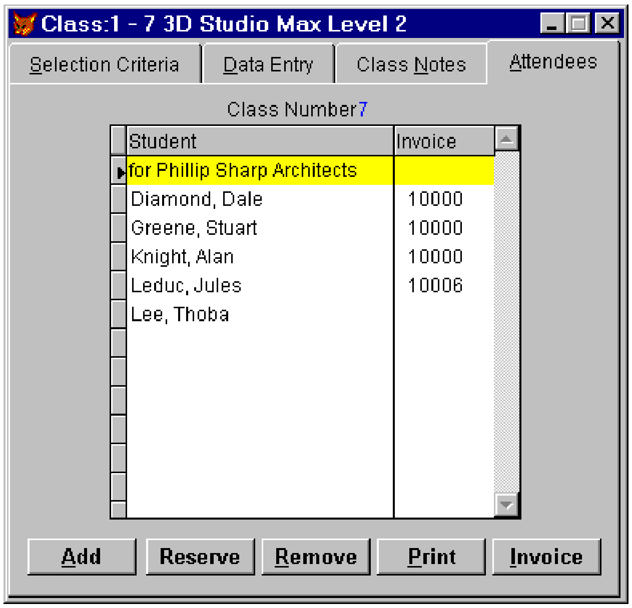
The **Course** field will pop up a list of courses for the class; the **Instructor** popup will give a list of instructors to choose to teach the class. The **Hours Required** field will be filled in from the information in the course table when you create a new class; you can change it if you wish. The fields with a grey background cannot be changed. **Hours Scheduled** and **Current Size** are updated as class sessions are scheduled on the calendar and students are registered.

The **Maximum Size** field will be set by the calendar when you schedule sessions for a new class, based on the classroom you schedule. It is taken from the value you specified in the **System Setup** form's **Classroom** page. You can change it if you wish, although the system will warn you if you try to make it greater than the classroom is set up to hold. The system will not let you register more students than the value in this field.

The **New** button will let you create a new class. You need to fill in the course, instructor, and hours required, then save the information. At this time the system will bring up the calendar so that you may schedule class sessions. We won't explore this at present, not until after we have explored the calendar in detail.

The **Class Notes** page allows you to record additional information about this class.

The **Attendees** page is where you register students for the class.



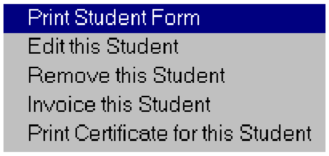
The **Add** button will pop up a student selection form, just like that on the Selection page of the Student form. You can select from the list, or start typing the name into the box below the list.

The **Reserve** button will pop up a company selection form, just like that on the Selection page of the Company form. This allows you to reserve places in a class for a company, when the company does not yet know who will be attending. The attendees list shows this by putting the word 'for' before the company name, and using blue text for name.

The **Remove** button will remove the student whose entry is highlighted on the grid.

The **Invoice** field shows the number of the invoice upon which this student was billed. This is useful for tracking who has and has not been invoiced. The **Del** field will have **Yes** in it if an invoice has been generated, but later deleted while cleaning up old invoices. This allows you to clean up invoices, but not lose track of who has been billed.

Right-clicking on the Student field pops up a menu of things that you can do with this student.

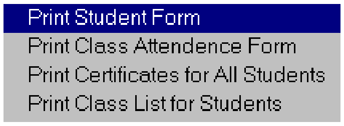


You can print a student form, which is a form with information about the student that can be placed at his workstation so that the instructor and other students can know who he is. You can also bring up the Student form for this student, or remove him from the list of attendees for the class.

Selecting the **Invoice …** item will bring up the **Invoice** form. If the student has been invoiced already, the existing invoice will be displayed. Otherwise a new invoice will be created for the student. We'll discuss invoicing later.

We have the ability to print a certificate for students. Currently, we only are set up to print certificates for AutoDesk courses on pre-printed forms. In a future release we plan to provide a more general facility for printing certificates.

The **Print** button brings up a small menu.

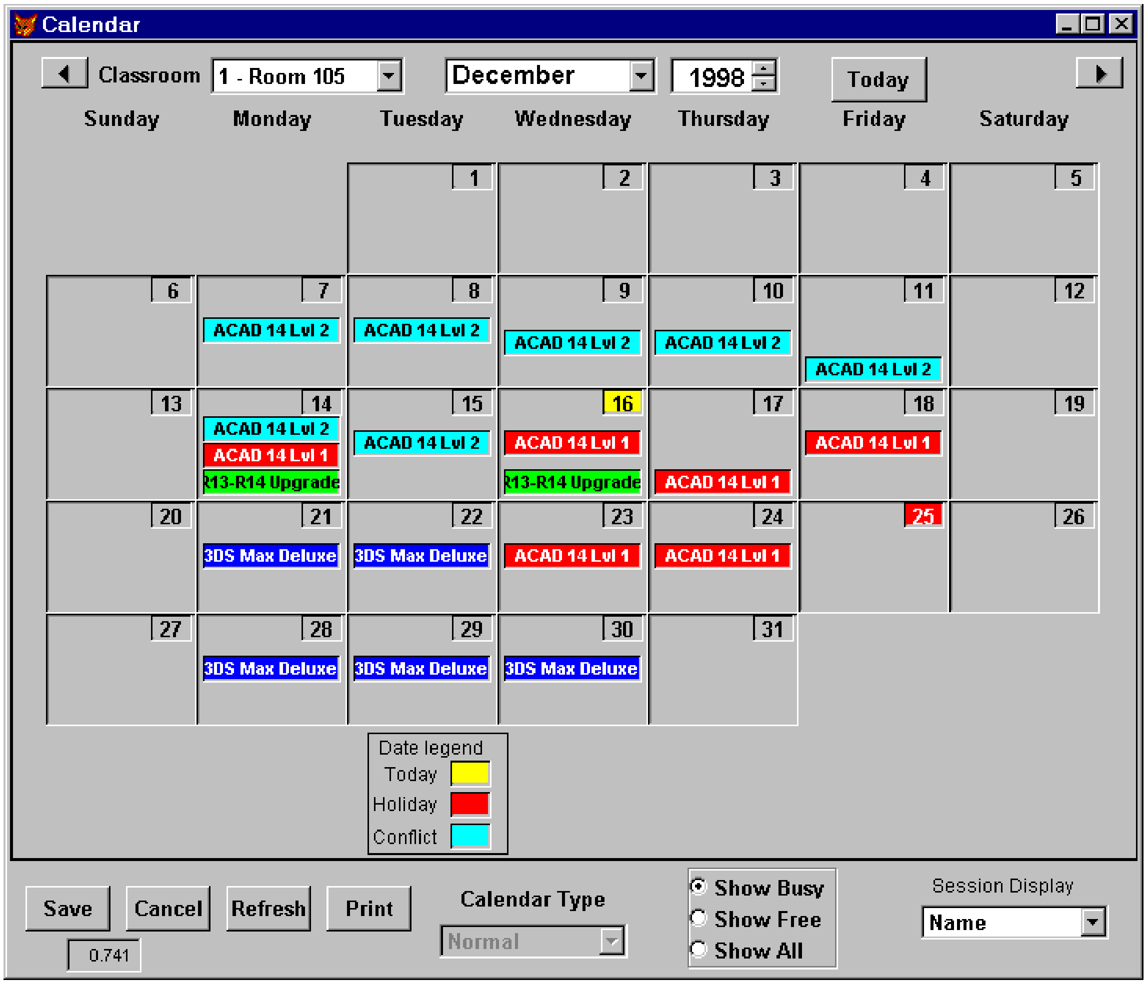


The first item prints a student form for the highlighted student, as described above. The **Class Attendance** form is a printed form that the instructor can use to keep an attendance record for the class. The **Class List for Students** is just a name and address list of all the students that you can give to each student, in case they wish to contact on another.

The **Invoice** button brings up the Invoice form for the highlighted student, just as described above in the right-click menu.

7. The Calendar Form

The calendar is the heart of the School Management System. You will find that you start up the calendar as soon as you run the program. Most other activities can be started from the calendar.



Across the top of the calendar are controls for selecting the month and classroom that the calendar will display. The two arrows move forward or backward one month at a time. There is a popup for selecting a month and a spinner for the year. There is a popup for selecting the classroom.

The date displayed in each box on the calendar can be highlighted in a different colour, as shown in the Date Legend box. For example, the 25th is shown in red in the sample above, as it is a holiday. The current date, the 16th, is shown in yellow. A date highlighted in light blue means that there is a date conflict for an instructor. This can occur if you change the instructor for an already-scheduled class, and the new instructor is already busy on some or all of the days. The **Class** for will warn you of this, but will let you continue. The calendar highlights these dates as a reminder. Later we'll see how you can find out what the conflicts actually are.

Each class is shown in a different colour. For example, on the calendar above “ACAD 14 Lvl 1” is shown in red.

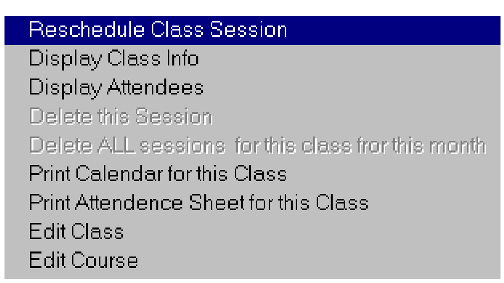
EKHO SMS supports four different time periods for class scheduling: all day, morning, afternoon, and evening. The position of a class session in a date box on the calendar indicates what time period it used. A morning session is at the top, an afternoon session just below that, and an evening session at the bottom. An all-day session will be positioned halfway below where a morning session would be. It would overlap the bottom of a morning session and the top of an afternoon session if all three were scheduled at once (which is impossible in the same classroom). For example, in the calendar above on the 14th, we see “ACAD 14 Lvl 2” in the AM, “ACAD 14 Lvl 1” in the PM, and “R13-R14 Upgrade” in the evening. (By the way, these names come from the **Calendar Name** field on the Course form – you may have to play with abbreviations to make them fit). On the 15th, you can see that “ACAD 14 Lvl 2” is an all-day session (compare it with the day before). Although the spatial aspect of this may seem confusing, you will quickly get used to it.

The default contents for a session box (that’s what we call the coloured boxes) is the course name. You can select different things to display by selecting from the **Session Display** popup in the bottom right corner of the calendar. You can display the class number, the instructor (useful for detecting those conflicts we talked about earlier), the cost, the hours scheduled, and the number of attendees. The **Number** display is very useful, as it displays the time period as well as the class number. Try it! You may find number more suitable for your everyday use.

The box at the bottom to the right of the Session Display lets you select whether the calendar should show busy sessions (those with a class assigned), free sessions (those without a class assigned), or both. Try selecting **Show Free** and observe the screen. It will now show the time slots, or sessions, available for scheduling classes. This is the view of the calendar that the class scheduling facility uses. Note the word “Free” in each session, as well as the colour code to show the time period (there is a legend for the colour code near the bottom right of the calendar in this view. Also note that if there is a class in the all-day time slot, the AM and PM slots do not show as free. **Show All** is shows all of the sessions.

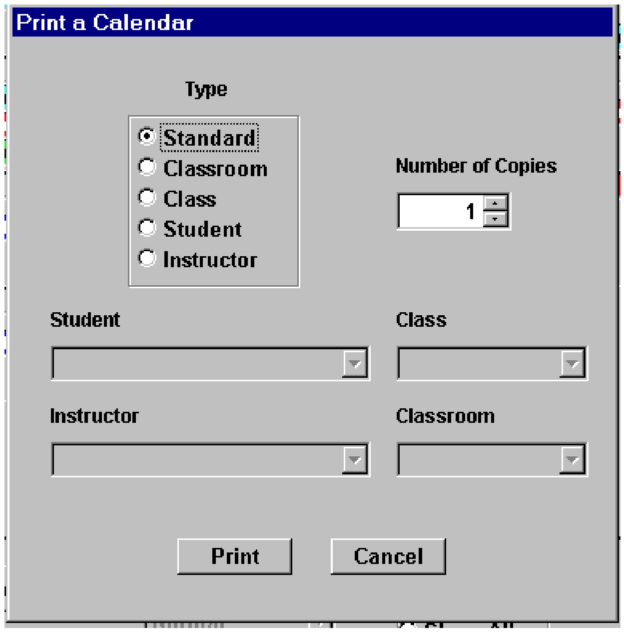
Clicking on a session in the calendar pops up a small form showing the details of the class. You can have several of these on the screen at once if you wish.

Right-clicking on class session pops up a menu of things that you can do for that class.



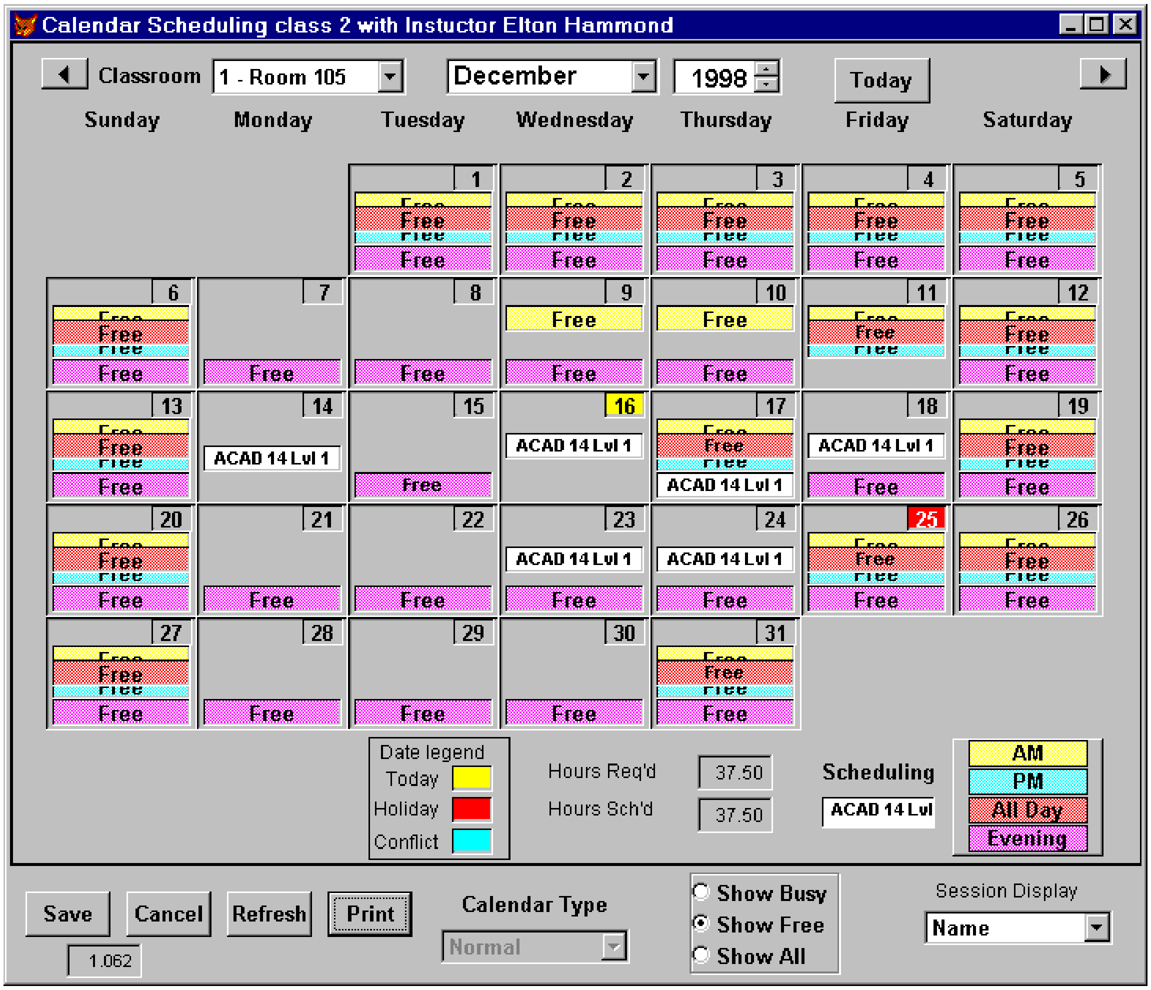
The first one is for rescheduling classes; we'll explore that in a minute. **Display Class Info** brings up the same form as clicking on the class does. **Display Attendees** pops up a form showing the students registered for this class. **Print Calendar for this Class** allows you to print a calendar just for this class. We'll look at printing in a minute. **Print Attendance Sheet …** prints the same attendance sheet as we saw in the Class form. **Edit Class** and **Edit Course** bring up the respective forms for editing.

The **Print** button brings up a form that lets you specify what sort of calendar you want printed.



You may select a **Standard** calendar – a full calendar for the month, or one for each of the other items shown. When you select one of the others, the appropriate popup box will be enabled so that you can select the student, or class, or whatever. If you select a class, there may be several pages printed if the class extends over more than one month (class 6, for 3D Studio Max, extends into January). If you print a calendar from the right-click menu for a class, you will get this same form, but the with the **Class** option selected, and the class number filled in.

Now let's look into scheduling classes. Right-click on one of the "ACAD Lvl 1" sessions, and select **Reschedule…** from the popup menu.



The title bar shows that we are scheduling class number 2, with Elton Hammond as the instructor. The calendar now shows the free sessions, as well as the sessions for the class being scheduled ("ACAD 14 Lvl 1"). The box labelled **Scheduling** also has the class being scheduled in it. You can change the display to the class number from the name if you wish – it may make it easier to see what is going on, as the number display shows the time period as well as the classroom number. The number of hours that the class requires, and the number of hours that are scheduled are shown; the latter will be updated as you add or remove sessions.

To **move** sessions, we use "drag and drop". You place the mouse over the session you want to move and hold the left mouse key down. Drag the cursor (which now has a small box attached to the bottom) over the free slot. Notice that the cursor shows the time period of the slot (Day, AM, etc) when it is over a free slot so you can be sure that you are dropping it in the right place. Try it. Drag the session from the 16th to the free "day" slot on the 11th. But while dragging, move the mouse over some of the other spots on the screen to see what happens. The cursor will turn into a “Don’t” symbol, and in some places the background will turn red if a drop isn’t permitted. Now move over the free slot on the 11th and release the mouse button. Now the class appears on the 11th, and the slot on the 16th is now free.

To **add** a session, drag the class from the **Scheduling** box near the bottom right corner of the form. Note that in this case, the cursor has a plus sign with it, indicating that you are adding a session. Drop it on the free “day” slot on the 17th, and note that the class now appears there, and the Hours Scheduled field has increased to 45 from 37.5 as you added a 7.5 hour all-day session.

You can also add sessions by holding down the **Ctrl** key while dragging and dropping. You can add several sessions this way; hold the Ctrl key down, then drag a session and drop it on a slot, then drag that one to the next free slot.

If you only want to schedule in a particular time slot (e.g. Day), you can have the calendar only show the free slots for that period by clicking on the appropriate period in the legend box at the bottom right of the calendar. Clicking on the period again will display all the free slots.

You can add sessions to another month by selecting that month. Click the right-arrow at the top right to move the calendar to January 1999. Note that the 4th, 5th and 6th dates are shown in red, as holidays. These are days that the class instructor, Elton Hammond, has booked off (remember when we worked on the Instructor form?), and you can’t schedule a class on one of those days. Now drag the class from the Scheduling box to a free slot.

You can add a class to another classroom as well, if necessary. Just select another classroom, the drag the class from the Scheduling box to a free slot. Try it.

To **delete** a session, right-click on the session and select **Delete Session** from the popup menu. You can delete all the sessions for the month by selecting **Delete All Session …** from the menu.

Click on the **Show All** option. Notice how the busy and the free slots are shown. The class being scheduled is always shown with a white background to distinguish it from the others.

Click on the **Save** button to save your changes, or on the **Cancel** button to erase any changes you have made. The display will return to the showing of busy sessions for the current classroom. When you save, the system will warn you if you have not scheduled enough (or have scheduled too many) hours. If you have deleted all the sessions for the class, it will inform you of this as well.

If you have the **Class** form for this class open while you are scheduling, it will change to reflect the new schedule. The start and finish dates, and the number of hours scheduled will be updated automatically.

Remember how in the discussion of the Class form we mentioned that when you created a new class and saved it, the calendar would appear? It will appear in reschedule mode, with the new class number in the Scheduling box. Select the proper month, year, and classroom. Then drag and drop from the Scheduling box to add sessions. When you save, the Class form will be updated with the classroom, start and finish dates, and hours scheduled. Simple!

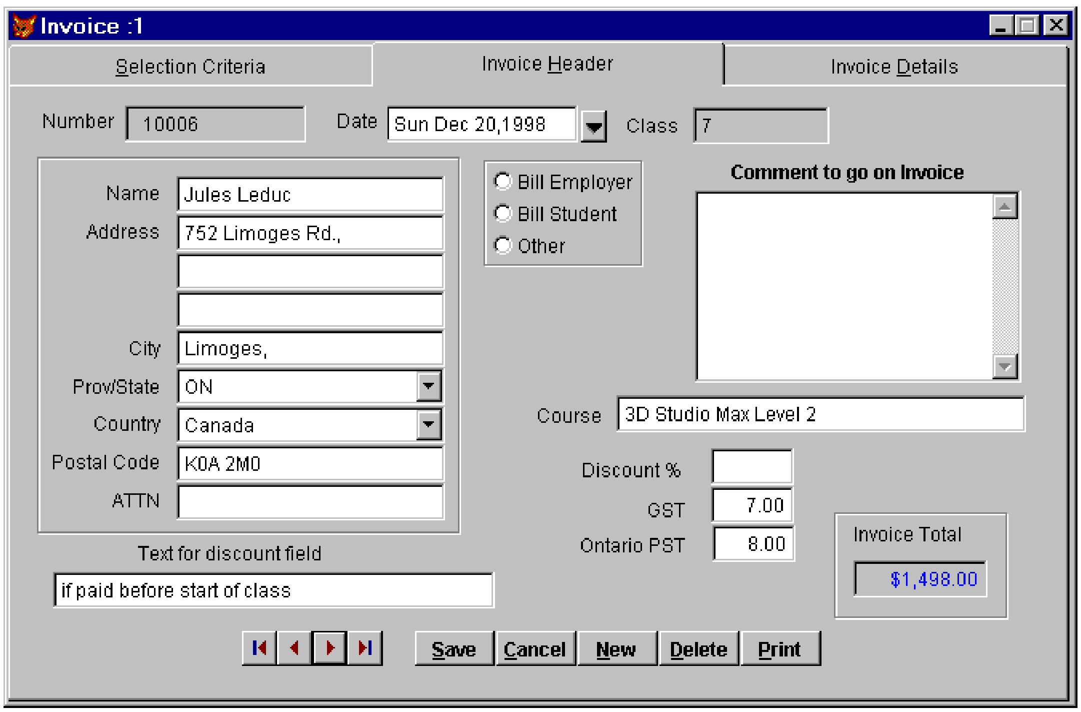
As well as the normal calendar, which shows all classes for the month, it is possible to display specialised calendars. This is where that little green **Drag Zone** box that you saw on the various other forms can be used. If you drag from the Drag Zone of the Instructor form to the calendar and drop there (the calendar will turn green to show that it is legal to drop an instructor), you will get a calendar that show those classes that the instructor is teaching. If you drop a student, or a course, you will get the appropriate calendar. To return to a normal calendar, click on the **Calendar Type** box and select **Normal**.

The calendar is the focal point of the EKHO system; play around with it until you are comfortable.

8. The Invoice Form

Invoices can be created in two ways. You can generate one automatically from the **Class** form's Attendees page, or you can create one manually. You can also edit an existing invoice.

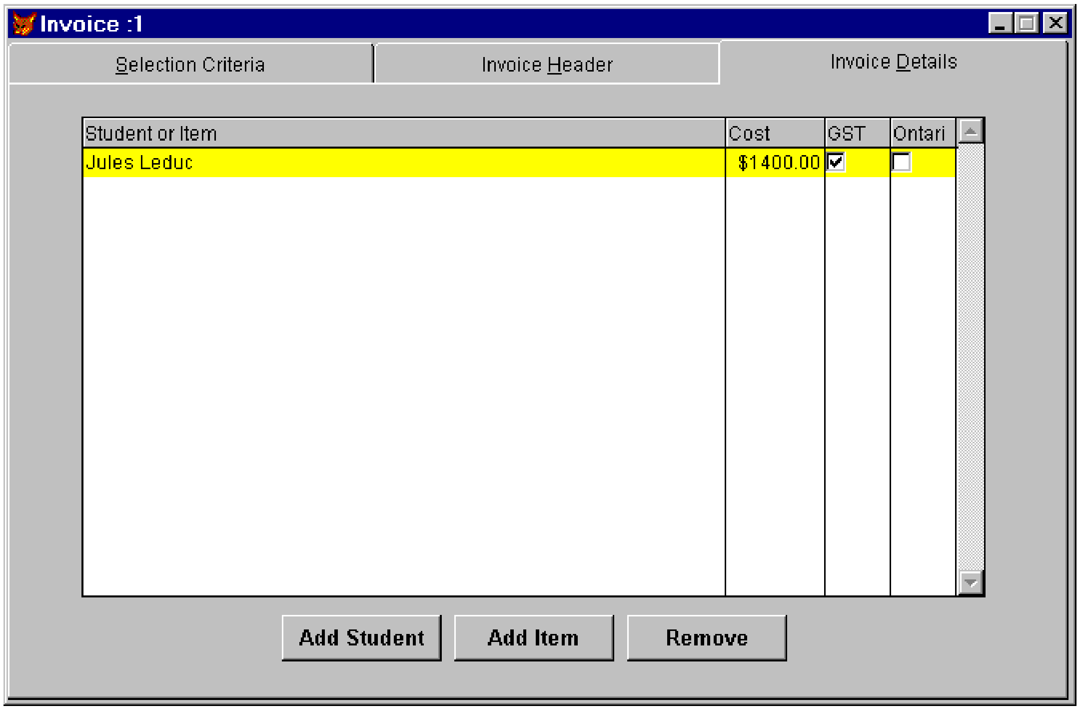
When you generate an invoice from the Class form, the invoice will be addressed to the student you've selected, and will have the course name filled in. The student will appear on the invoice details page. Try it. Bring up the Class form, and select class number 7, the 3D Studio Max class that we were working with before. Go to the Attendees page, select "Leduc, James", and click the **Invoice** button. The following form will appear:



The student has been set up as the addressee. Clicking on the **Bill Employer** option will change the addressee to the student's employer. Clicking on the **Other** option will add two buttons to the display allowing you to select a student or a company from a list; the lists are the same as they appear on the selection pages of the Student and Company forms. You can also just type in a new addressee.

The **Course** field will be printed on the invoice; you can change it. There is provision for giving a discount. If the **Discount** field is filled in, then the text in the **Text for discount field** box will be printed on the invoice along with the discount. The tax fields that show on the form depend on what you have entered in the **System Setup.** The example above shows Canadian GST and Ontario PST. If the rate for a tax is zero, then no entry will appear on the invoice for that tax.

Now click on the **Invoice Details** tab.



The student has been automatically added to the invoice details, along with the default course cost. Many times you will be billing an employer for several students who are taking the same class. You can add additional students from the class to the invoice by clicking on the **Add Student** button. This will pop up a list of those students who are registered for this class that have not yet been invoiced. Selecting one will add that student to the invoice, with the cost as filled in on the Header page. You can change the cost if you wish.

The **Add Item** button will add a blank line to the details; you can fill this in with anything else that you might wish to bill for, such as manuals.

Note the columns headed *GST* and *Ontari*. These are used to specify what taxes are applicable to each item. There will be one column for each tax shown on the invoice header page. Double-clicking on the box will turn the check mark on and off. The text in these headings are taken from the **Invoices** page of the **Setup** form.

When you print an invoice in the trial system, you will get an invoice form set up for The EKHO Institute. When you purchase a system from EKHO, we will customize the invoice for you at no extra charge, using your graphic logo if you have one, and any other pre-printed information you wish.

At the same time as you are printing the invoice, the system will let you print additional material to send out to the student.

Now go back to the Invoice Header page, and click the **Print** button. A small form will appear, allowing you to chose what you wish to print.

The default is to print only the invoice. You can select other items to print: an envelope with the invoice addressee on it, a calendar for each student, a course outline, a general welcome sheet and a map. You create the map, welcome sheet, and course outline using your favourite word processor and graphics package, and then print each to a file; store the file in the same directory as the EKHO system. The map needs to be called MAP.PRN, and the welcome sheet must be called WELCOME.PRN. A course outline is given a name consisting of the **name** of the course, as shown on the Course form (not the formal name or the calendar name), followed by ".PRN". For example, for the course on this invoice, the name would be "3D Studio Max Level 2.PRN". Note that spaces are allowed in names in Windows 95 and Windows NT.

When you save the invoice, the Class form's Attendees page will be updated to show the invoice number next to the student(s) that were on the invoice.

You can create a new blank invoice by clicking on the **New** button. In this case, the header page has two buttons to let you select an address from either the student or company lists, or you can enter an addressee manually.

If you fill something in to the **Course** field, that information will appear on the invoice in a line reading "Re: …" You can also add other text to the invoice using the **Notes** field.

On the Details page, the only option is to add items, since there is no class associated with the invoice. An item, of course, can be anything you wish to enter.

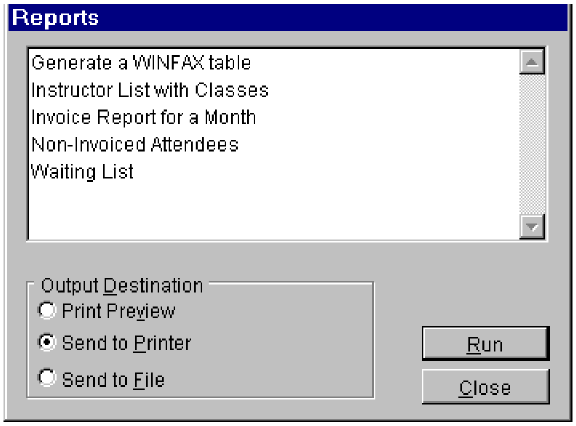
You can edit an existing invoice by clicking on the **Selection** page. This is also the page that comes up when you click on the **Invoice** button on the toolbar.

Select an invoice from the popup list, then click on the **Display Invoice** button.

Note regarding invoice numbers: in the system setup, you can assign a starting invoice number to fit in with your existing accounting system.

9. The Reports Form

Click on the **Reports** button on the toolbar to bring up the following form:

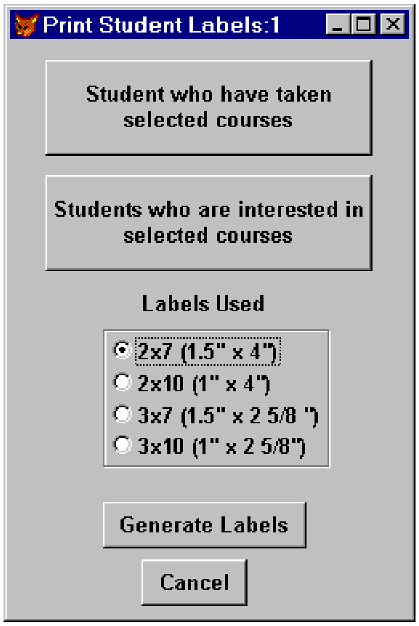


This form gives you a list of reports that you can print, or preview on the screen, or have printed to a file. “Generate a WINFAX table” does not actually print anything; it generates a list of all students in a form suitable for use by WINFAX Pro, a fax program. It can be used to send out mass FAXes to your students.

More reports will be added to the system as our customers request them. These are the ones that we have found useful in the years we have been running the system. We had others, such as complete student lists, but with 3000 names on our list, that’s not too useful.

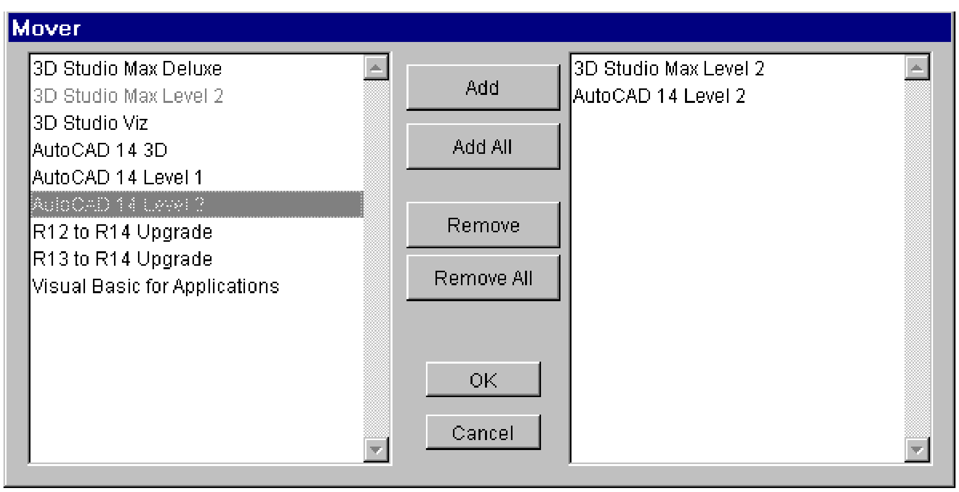
10. Printing Labels

Selecting the **Print Student Labels** item from the **File** menu brings up the following form:



This is used to print mailing labels. We support the four sizes of label sheets shown; these are the most popular sizes from the Avery catalogue. The list shows the number of labels across and down, and the size of each label. Use 1.5" high labels if you can, as they have more room for the address.

You can print labels for students who have taken specified courses in the past. This would be useful, for example, to market an Advanced course to those who have taken the Basic course. You can also print labels for students who have expressed an interest in specified courses (via the Interest or Wait List pages of the Student form). Clicking on either brings up the following form for you to select the courses:



The “mover” form allows you to select courses from the left window and move them to the right window. The courses in the right window are those that will be used for the mailing. You can move courses between the two windows by selecting with the mouse and clicking the **Add** or **Remove** buttons, or by double-clicking. You can add or remove all the courses at once. You can drag and drop courses from one window to the other. You can select several courses at once by holding down the Ctrl or Shift keys when you click with the mouse. Play with the mover to get the feel of it. Click **OK** when you have made your selections.

Click the **Generate Labels** button to print the labels. If you are printing labels for students who have taken certain courses you are asked to enter a date (it is a calendar popup) before which the students must have taken the course. This allows you to avoid sending mailings to very recent students.

11. Other Features

The **File** menu provides access to several other features:

- **Print Setup**. This brings up a dialog box to allow you to select the printer to be used for subsequent printing operations
- **Print Reports**. This is the same as the **Reports** button on the toolbar
- **Database Utilities.** This brings up a form to perform system maintenance activities on the data files. The data files can have their structures updated if this is required by a new release of the software. Their indexes can be rebuilt, and the files can be packed to remove deleted records. There is also a file repair utility that can recover files that have been damaged when a workstation or server crashes. These utilities are normally only used upon advice from EKHO Tech Support.
- **System Setup.** This brings up the setup form that was discussed in the section on installation
- **User Preferences.** This allows the user to select between production and test data.
- **Activate.** This provides the ability to enter an EKHO-supplied key to activate optional features of the software.
- **Backup Data.** This will back up the data files to a user-selected directory in a compressed (‘zip’) format. Each backup file name contains the date and time of the backup, making it possible to keep a set of backups (one each day, for example).
- **Login.** This brings up the login form so that a different User Name (normally with different privileges) may be used. All other forms are first closed.
- **Special**. This will run an EKHO-supplied program to perform maintenance activities on the system. It should only be used upon instruction from EKHO Tech Support.
- **Error Log**. This will bring up a form that displays the contents of the error log. If the system encounters problems, it will normally display a dialog box telling the user of the error, and giving him a choice of things to do – normally, the user would chose the option to quit the existing form. The system also logs details of the error. EKHO Tech Support may request you to bring up the error log form and read off some of the information. It provides the ability to E-mail the log file to EKHO Tech Support. Note that for this feature to work, your E-Mail program must support the Microsoft MAPI interface, and be set up as the default MAPI mail client. We have successfully used Eudora Pro (Version 3 or later), Microsoft Outlook and Outlook Express, and Microsoft Exchange as MAPI mail clients with this system.
- **Exit**. Terminates the operation of the EKHO SMS.

This is the end of the tour of the EKHO School Management System. In order to use your own data, Select **User Preferences** from the **File** menu, and uncheck the **Use Test Data** box. Exit from the system by selecting **Exit** from the **File** menu, or by clicking on the Close box in the top right corner of the screen.