

# ISO SCHOOL ADMINISTRATION INFORMATION SYSTEM USER MANUAL

*Managing a school is difficult. Managing the students shouldn't be*

Prepared by System Developer

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## INTRODUCTION

The ISO School Administration Information System is a software system designed to simplify the critical aspect of managing the students and most importantly their school fees payments for their lifetime as students of the respective school. This document explains the various features and functions of the system as well as guidelines on how to utilize the system efficiently. Any person intending to use the system to perform any function is advised to read and understand this document. To better grasp the content, you should read this document while using the system to practice and verify the functions explained.

The ISO SAS is not an accounting system and is not meant to replace the accounting system used by the school. It simplifies the aspect of managing students' information and their school fees payments. Generally, it supplies information that makes accounting easier.

The system developer is always available for remote / physical support in the event that an issue has occurred that could not be resolved through referencing the correct section of this document. Contact information has been provided. Furthermore, new features or customizations of the system where the school sees fit can be requested and developed upon agreement. **If you think the system would serve you better if it did something in some way, then we might make that happen. Feel free to contact us.**

**All the Best.**

## ACCESSING THE SYSTEM

The ISO SAS can be accessed using a browser such as Internet Explorer, Mozilla Firefox etc. (latest version of Google Chrome is recommended). If the system has been installed over a network (LAN) then you have to make sure the computer you are using has been connected to the network concerned to be able to access the system. Basic knowledge of web-based applications is essential for efficient use of the system.

To use the SAS, open up your browser and navigate to **127.0.0.1** or **localhost** - You will be presented with the login page similar to figure 1 below. You could also bookmark the page or set it as your home page for faster access.

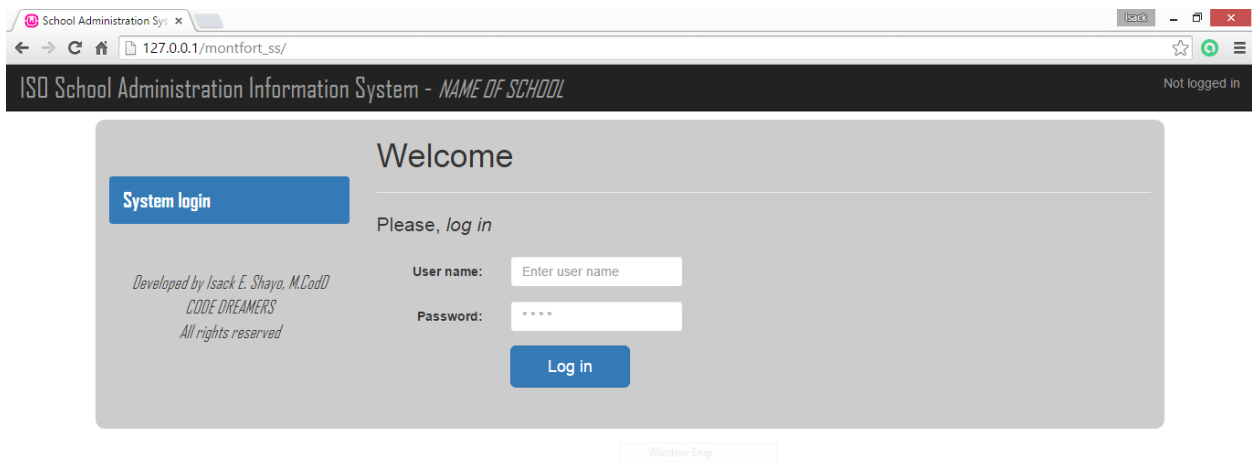


Figure 1: Sample login page

If the above or similar page does not appear and you get a browser error such as ‘Page not available’ or ‘Problem loading page’, or if those errors appear after you have logged in to the system then;

- If the system is installed over a network, check that you are connected to it.
- Check the address spelling, it has to be exact. Characters such as spaces are not allowed.
- If the system has been installed on a single computer refresh the page (press F5). If that does not solve the issue, restart the computer.

You should now provide the system with your SAS login credentials i.e. user name and password<sup>1</sup>, exactly as they have been provided to you and press Enter or click “Log In”. You should now see a welcome page such as the one in Figure 2 - meaning you now have access to the system. However, what you would be able to see and perform in the system will depend on the permissions and clearance level you have been granted.

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<sup>1</sup> If you forget your login credentials contact system administrator. Keep your credentials safe and do not provide them to anyone. The SAS credentials are not related to your Windows user account.

## User Interface Overview

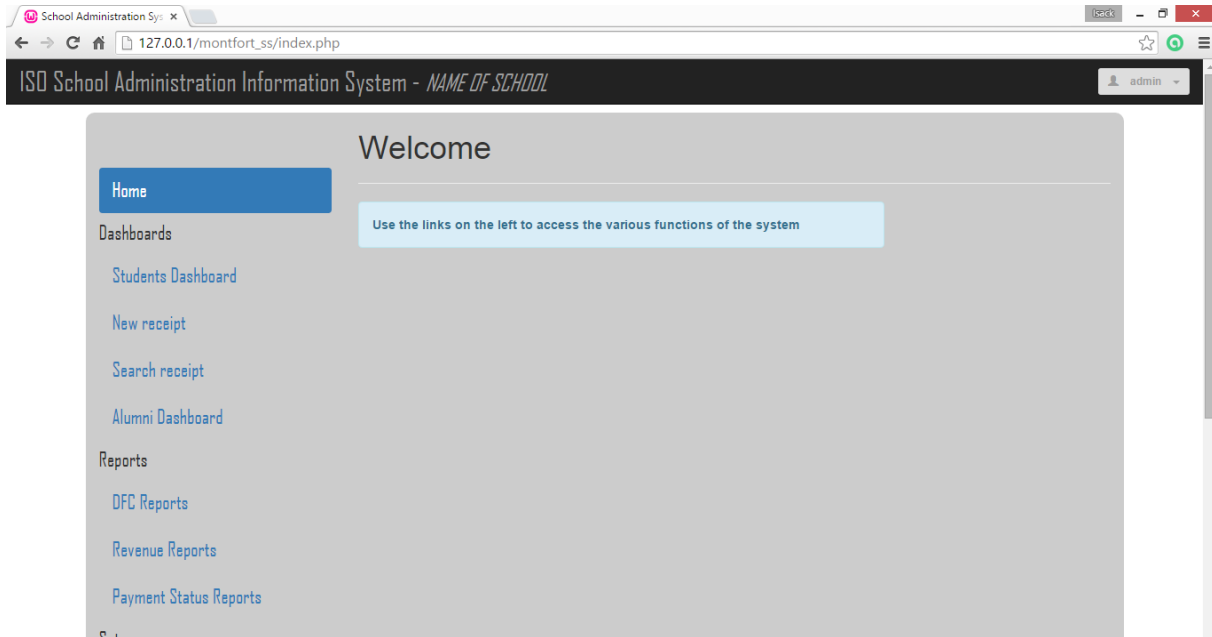


Figure 2: ISO SAS Welcome screen & User Interface

The SAS UI is composed of a few components:

- The topmost fixed bar that serves as system title and contains user actions button
- The navigation section on the left which has links used to maneuver through the system. Note that the links available to a user depend on the permissions and access level.
- The main display which also has its heading. This component provides the major interaction between the user and the system. It has also been optimized for printing, meaning you can print any page you see in the system and have it already printer-friendly.<sup>2</sup>

### Logging out

The system automatically logs you out when you close the browser window, though manual log out is advised. To log out manually press the user actions button<sup>3</sup> and select “Logout”. After you log out you will be required to supply your credentials to be able to access the system.

<sup>2</sup> Pages are printed through the browser’s print dialog, accessible through Menu > Print or shortcut Ctrl+P. Browsers which generate a preview of the page such as Google Chrome are recommended.

<sup>3</sup> This button is found in the topmost black bar. It is labeled with the currently logged in user’s user name.

## SETTING UP THE SYSTEM

The ISO SAS requires some data to understand the environment it is working on so as to better adapt to the school and also to apply some security and operational constraints. Such include the classes and streams in the school and the school fees structure for each class. Though these settings are set during installation, the school has the capability of changing them when required, and this section explains how to do so. Please read the whole section before proceeding.

### Classes and Streams

The system contains information about the streams / combinations for every class in the school. You cannot register a student or transfer a student to a stream that does not exist in the system.

Classes refer to levels such as Form 1 / 2 etc. for secondary schools; Standard 4 / 6 / 7 etc. for primary schools and Kindergarten. Streams refer to sub-groups in the classes such as Form 1 A, B, C etc. and they can be given any name. There is no limit to the number of streams per class. One point to note is that streams in a class have no relationship with streams in other classes having the same name. For example, having a stream 'Form 1 A' does not automatically create a 'Form 2 A' stream in form 2.

When a new stream is added or you wish to change the streams information, click the 'Classes and streams setup' link under the 'Setup' section. Select the class you want to view / modify streams for by clicking its respective button. This will show you the list of all streams in that class, or a warning if there are none.

**N.B There must be at least a single stream in every class in the system. If a class in the school has only one stream then you should at least add a 'MAIN' stream to that class in the system and register students into this stream.**

To edit an existing stream's information click the 'Edit' button corresponding to the stream. There you can change the stream's details (e.g. name) and save your changes. By doing so, the details of all the students in that stream are changed automatically to the updated details. **In providing stream names do not include the class name prefix<sup>4</sup>.**

When a new stream has been created by the school and students have been assigned to it after the SAS has been set up and you want to propagate those changes into the system, you can create the stream by clicking the 'Add new stream' button in the corresponding class and supply its name. After the stream has been created, you have to transfer the students into that stream by editing each individual student's details as shown in the Student Details section.

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<sup>4</sup> For example, for Form 1 A, the stream name you should enter in the system is 'A' and not anything else.

## School Fees Structure

**This is one of the most important aspects of the ISO SAS therefore it is crucial that system users who deal with the school fees payments understand it.**

The ISO School Administration System now supports installment-based fees structures (v2.6+). This means that the school can specify the number of payment installments it uses and add installment-specific amounts to the school fees structure.

The school fees structure for a class is the breakdown of payment elements and their respective amounts that students of the particular class are eligible to pay. The ISO SAS supports compulsory payments such as school fees and optional payments such as accommodation and transport fees, which a student can opt to pay and therefore be billed accordingly. The school fees structure is only applicable for school fees payments and not payments made on other / sub-accounts. Refer to the Payment sub-accounts section for details.

*The ISO SAS invoices / determines the payments liable by a student from the school fees structure of the student's current class. For instance the system understands what to charge a form 1 student from the school fees structure set for Form 1.*

The school fees structure should be set depending on how the school treats its school fees. You can for example merge all compulsory payment elements such as stationery, tuition fees, food, caution money etc. into one major compulsory element called 'School fees' with the collective amount or set all these individual elements into the structure with their respective amounts. The implementation is still the same and the developer will recommend to the school which option best matches the school environment.

To access the School Fees structure for users who have privileges to do so, click the 'School Fees Structure' link in the Navigation panel. This will direct you to a page with an interface similar to the 'Classes and Streams' page. Click the required class to access its school fees structure.

The ISO SAS is capable of remembering previous years' fees structures so that the school can modify its current fees structure without affecting payment reports for previous years.

**Adding elements:** You can add elements to the school fees structure at any time and as a result all students in the respective class in the current year will have to pay for the element if it is compulsory or would be provided with the option of selecting the element if it is optional. Enter the element name - short and clear, the amount payable for that class, the installment within which it is supposed to be paid for and finally check the appropriate box depending on whether it is compulsory or optional. If you have a payment element of the same kind but different amounts, for example transport fees which varies with location, enter multiple elements with similar title for example 'Transport – Location A', 'Transport - Location B', 'Transport - Location C' and their respective amounts. That way, a user can select the respective transport payment opted by the student.



Payment elements can also be edited and deleted. This does not alter the amount of money already received by the school but rather the payment status reports of students in the current year.

Note that you should add a new element only if another element with the same name does not exist i.e. you are introducing a new element in the fees structure that was not present in previous years. If you are modifying the amount of an already existent element for a new fees structure, use the 'Edit' button instead.

## Payment sub-accounts

Some schools utilize a separate payment account for a provided service such as hostel / food that runs parallel to the school fees account (i.e. the service is not part of the fees structure). The ISO SAS caters for these cases by use of sub-accounts. Student's payments added into the main (school fees) account will be compared against the school fees structure to generate a payment report for the student and enforce school fees debt. Sub accounts are optional in nature and have no fees structure. A student can only make payments into the account and the system will store them to generate a set of useful reports upon request.

## Registering students

The ISO SAS only deals with students registered into the system. Therefore, for maximum efficiency, a student must be registered into the system as soon as he/she is admitted into the school. However, the registration data should be available beforehand. To register a student into the system, the ISO SAS **requires;**

- Admission/Registration number according to the school's format.
- Class and stream (the stream has to be registered already, ref Classes and Streams)
- Student's first and last name (middle name is optional), and sex

Furthermore, the following data can be added, where applicable and available: Student's passport size photo, birthdate, nationality, tribe, religion and denomination; Father and Mother's names and occupations; Physical and postal addresses; Contact information and any relevant information that is worth noting as Remarks. This information is used to construct the student's file. The information can be edited at a later time even after the student has been registered. Additionally with SMS service subscription; during student registration you can input up to 2 phone numbers for parents of the students to which SMS messages will be sent.

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To register students click the 'Register new student' link from the 'Setup' section of the navigation panel. Provide relevant information in the fields designated and click 'Add student'. If all went well, the system would provide you with a page showing the basic student data you entered and the photograph

you provided for verification. Verify the data and click 'Register student'. Then you would have completed registration of the student. If anything went wrong, the system would notify you accordingly.

Points to note during registration of students:

Next to the Admission number text field, the system shows you the registration/admission number and names of the last registered student so that you could easily deduce the admission number of this new student if the school follows a numerical order in assigning the admission numbers. Note that, the last registered student in this context is the student with the last admission number when they are all arranged in ascending order and not necessarily the last student to be registered into the system. For example, suppose you have registered students 1000, 1001, 1002 and then registered student 1020; when you register students 1003, 1004 – 1019 you will notice that the last registered student remains to be 1020 – it still is the last number.<sup>5</sup>

You can register students before the year begins. For example after interview and selection during 2015 for 2016 students you can immediately register them, **but specify the class year as the next year**. This way they would not be registered into the class of the current students.

With passport size photos, for the best image a photograph with a square pixel aspect ratio is recommended. This means that the width and height of the image should be equal or similar. You can view these properties by right clicking the image file and selecting 'Properties' or you can ask a local computer expert for assistance.

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<sup>5</sup> If the school uses a complex admission number assignment system that makes the ISO SAS insufficient in this regard, contact the developer to build for you a customized solution.

## MANAGING STUDENTS

The ISO SAS has various functions, processes and utilities. From here on below, the document will elaborate each function of the ISO SAS and how to use the system efficiently. Furthermore, the system is self-documented meaning you can learn how to use it from within itself. Take note of the various informational alerts that the system gives you.

### STUDENTS DASHBOARD

Accessed from the navigation panel, this is one of the most fundamental and powerful components of the system as many other functions can be accessed from within here. By default, it shows a simple search interface, from where you can search for specific students or group of student, and perform subsequent functions.

The ISO SAS Dashboard search interface retrieves students that match all the provided criteria, ignoring empty fields. Therefore submitting a search without any terms returns a list of all current students of the school. Also note that for names, you do not need to specify the whole name. A part of the first/middle/last name is sufficient.

#### Student lists

These refer to lists of students having common attributes such as class, stream, admission number template and names. To get a student list, supply the dashboard with the criteria you want, and leave the unrelated fields empty. For example, to obtain a student list for form 4 students of all streams select the class from the form field and click 'Search'.<sup>6</sup> To specify a stream within that class, fill the stream name in the allocated field and search. For example, for a list of 'Form 4 A' students, specify class as 4 and stream as A. You should experiment with retrieving various student lists such as students of a stream, students having the name John, students having the last name Doe, students whose registration number begins with XXXX... etc.

What can you really do with student lists? For example, you can quickly know the number of students in a class/stream and their names. When you need more functionality, then the system provides you with an interface for exporting the search results from the system to a spreadsheet such as Microsoft Office Excel Spreadsheet.

The student list is also a shortcut way to the SMS dashboard. Clicking the 'Send SMS' button after retrieving a student list opens the SMS Dashboard, with all the students in the list automatically added as message recipients in the SMS dashboard. This simplifies the process of delivering a common SMS message to a substantial number of parents simultaneously. Consult the SMS Dashboard section for more info.

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<sup>6</sup> Pressing Enter while in a text field also retrieves the search.

## Exporting search results to spreadsheets

You can export search results to an excel spreadsheet, for additional processing of the data according to your preferences. After executing a search, you will notice a button labeled 'Export to spreadsheet' beside the number of students found. Clicking on that button will provide you with an interface allowing you to select the columns of student data you want in the spreadsheet. Check the data you want to include and click 'Export spreadsheet'. A download will start with the filename 'student\_list.xls'. This is your spreadsheet file.

Now you can open the downloaded file using a spreadsheet program that you are familiar with, such as MS Excel, and work with it from there.

*Note that during opening MS Excel may issue you a warning that the file is in a different format than specified by the file extension - this is normal therefore press 'Yes' to open the file. After working on it, you are advised to save it properly with Excel using the Save As dialog box and selecting a file type from there. This solves some compatibility issues and would get rid of the warning in future times when opening the file.*

With this interface the limit to your productivity is your ability to work with spreadsheets e.g. in MS Excel. You could use this to prepare class lists sorted by name, sex, age and other columns. You can also prepare daily & examination attendance lists. You could filter search results in Excel to show students having a criteria not specified in the student's dashboard e.g. filtering by sex to obtain number of students of a certain sex, filtering by religion, denomination, nationality, date student joined school etc. The information is in your hands.

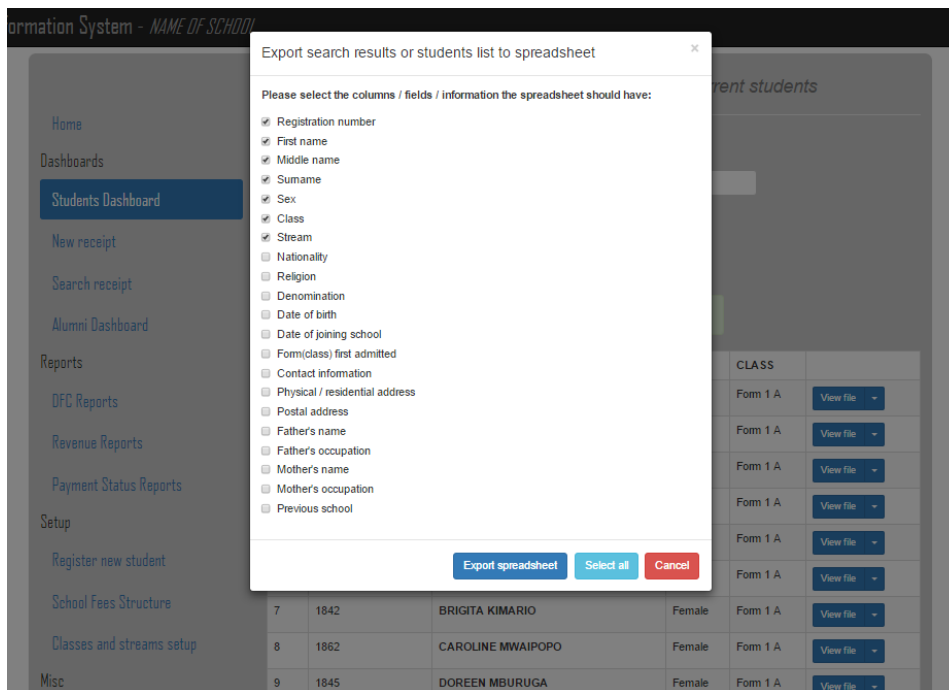


Figure 3: Sample export spreadsheet interface

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	REGISTRATION NUMBER	FIRST NAME	MIDDLE NAME	SURNAME	SEX	CLASS	STREAM											
2	1849	ABIGAIL		BROWN	F	1 A												
3	1865	ANGEL		KIMARIO	F	1 A												
4	898	ANGEL	RWYEMAMU	SHAYO	F	1 A												
5	1680	BEATRICE	PAUL	NKYA	F	1 A												
6	1844	BELINA		KARUGABA	F	1 A												
7	1858	BELINDA		URASSA	F	1 A												
8	1842	BRIGITA		KIMARIO	F	1 A												
9	1862	CAROLINE		MWAIPOPO	F	1 A												
10	1845	DOREEN		MBURUGA	F	1 A												
11	1843	DORIS		MBURUGA	F	1 A												
12	1864	EDITRUDE		PATRICK	F	1 A												
13	1846	GLORY		KWEKA	F	1 A												
14	1847	GLORY		NIXON	F	1 A												
15	1869	GLORY		SWEETBERT	F	1 A												
16	1972	GRACE		KIVEGALO	F	1 A												
17	1841	HAPPYNESS		MSUMBA	F	1 A												
18	1944	HELLEN		BAHATI	F	1 A												
19	1861	IRENE	MWAKALASYA		F	1 A												
20	1976	LILIAN		MACHA	F	1 A												
21	1872	MAUREEN		ALLEN	F	1 A												
22	1859	MWINGA		MPUNGWE	F	1 A												
23	1851	NOREEN		KILEO	F	1 A												
24	1962	SCOLASTICA		WOLFGANG	F	1 A												

Figure 4: The resulting spreadsheet

### Searching for a student

The students dashboard also enables you to search for a specific student in the school. You specify the details of the student such as first/middle/last name or initials, form, stream or registration number. The amount of detail you need to specify while searching for a student depends on the number of student with the said similar characteristics in the school. After executing the search, look for the student in the search results obtained. If you specified enough criteria then the search result might return only one student which is an exact match.

There are two main functions you can access after searching for a student. First, you can view the student's file by clicking the 'View File' button next to the student's details. This will take you to the student's file which also has important functionality explained in the 'STUDENT FILES' section. Furthermore, you can add a payment made by the student by pressing the 'Add payment' button. This is accessible from the small arrow (caret) next to the 'View file' button corresponding to the student.

## STUDENT FILES

The ISO SAS students' files mimic real world student files maintained by many schools. These files hold information about a student and also have interfaces from which you can perform various operations to a student in the system. The pieces of information held by the system include:

- Admission number
- Student's full name
- Student's official passport size photograph
- Current class and stream
- Sex
- Nationality and tribe
- Religion and denomination where applicable
- Date of birth of student
- Date student joined school
- Student's previous school
- Father and mother's or guardian's names and occupations
- Contact information for parents/ guardians
- SMS recipient phone numbers
- Student's physical and postal addresses
- Remarks or other information that the school finds suitable

The ISO SAS also supports attaching other documents to the student's file. These documents are attached permanently to the student's files (meaning they will be visible even after the student leaves the school) and are accessible whenever the student's file is accessed.

### Viewing student files

To access a student's file first search for a student using the Student's dashboard, and click the 'View file' button corresponding to the student. The page that would open afterward would be the student's file showing student's details, attached documents and some few functions linked at the bottom of the page.

You can also print this page to get it on hardcopy by using your browser's printing mechanism (shortcut Ctrl + P). It is advisable to set the margins to narrow as this might get you the whole file on one A4 page.

### Editing student details

To edit student details when updated information is available or to correct a previously made mistake, click the 'Edit student details' button at the bottom of the student's file. This will take you to a page with text fields corresponding to the various details about the student, pre-filled with the currently available information. Edit the fields you wish to modify by supplying the new details and clicking any of the 'Save' buttons on the page. If there are some issues with the data you entered (example invalid or empty data) the system will notify you, requiring you to navigate back to the editing page by pressing the 'Back' button of your browser or the backspace key. You should note that the browser might force you to

reload the page due to missing cache. You should therefore press F5 or 'Reload' or 'Refresh' and resupply the correct data. Otherwise if all went well then the student data will be updated in the system.

### **Attaching documents to the files**

The ISO SAS supports attaching of other non-system official documents, specifically PDF's, images and MS Office files to a student's file in the system. This could be used to attach a wide range of administrative or disciplinary documents that are to be used as a future reference when looking at the student's files. These documents, unless deleted are attached permanently to the student even after they leave school.

To attach a document to a student, open the student's file, scroll to the bottom of the page and click 'Add document to student's file' button. Locate the file on your computer and select reason for attaching the file (between Administrative, Disciplinary and Miscellaneous). You can also provide a short description about the document if you see fit. To finalize this process, click the 'Add document' button.

After the file has been attached, it will show up on the 'Attached documents' panel of the student's file. You can view or delete it by clicking the respective the appropriate action from the 'Options' menu corresponding to the document concerned.

### **Terminating a student**

When a student leaves school for other reasons apart from completion of studies, he or she should be removed from the current student list of the school and be therefore accessible as an Alumni. The student termination operation takes care of this. Clicking the 'Terminate student' button at the bottom of the student details page will provide you with an interface to specify the date that the student left school and the reason. After clicking the confirmation button the student will now be officially labeled as alumni in the system. He / she will not appear when searching from the student's dashboard. For more information about Alumni consult the corresponding section.

### **Reinstating a terminated student**

If a student has been incorrectly terminated, or if for any reason you see it fit to return a terminated student /alumni into the school as a current student without re-registering him/her as a new student, Navigate to the student's file (then the alumni file) and there will be a 'Reinstate as student' button. Click it, provide the class and stream to which the student should be allocated and confirm the action. The student will be returned as an active / current student of the school, and will be visible from the student's dashboard.

### **Deleting a student**

The system allows you to delete a student, completely removing the entry of the student. It should only be done if the entry of the student is irreparably wrong and the student has not paid anything to the school. Otherwise consider terminating the student. Click the 'Delete student' button in the student's file and read the provided notes if you want to attempt this procedure which cannot be undone.

## STUDENTS PROMOTION & CLASS TRANSFER

### Yearly promotion

At the end of each year, students need to be promoted to the next class. After promotion of a student he or she is billed according to the fees structure for his / her new class with immediate effect. Therefore, this operation should be done at the start of a new year and not the ending of the current year (i.e. promotion should be conducted in January). This goes hand in hand with receiving payments for the new class year. You might want to back up the system data before doing this operation.

The ISO SAS provides a feature for the automated promotion of students. This operation moves all the students in the selected classes to the next class and keeps the same stream. For example, promoting Form 3 with streams A, B and C moves all these students to Form 4 and keeps their same stream. Therefore to prevent issues that may arise in the future make sure that the receiving class has the same number and names of streams as the current class. For example, if you have registered Form 3 A, B and C but you only have Form 4 A and B, you should add the stream C in Form 4 to have matching streams. Refer to the Classes and Streams section.

To promote students click the 'Administrative Operations' link in the navigation panel then go to the 'Automated promotion' panel in that page. Choose the classes that you want to promote and click the 'Auto promote' button. The system will notify you of the successfulness of the operation.

*The ISO SAS has a smart feature that prevents users from promoting students multiple times in the same year. It will therefore only promote students if a year has passed. If the system sees that the year has not ended yet it will reply with an error asking you whether students have been promoted already. You should then check the class year in one of the student's files (e.g. Form 4 A of 2015). If the class year indicated is the same as the current year then students have been promoted already.*

Furthermore, you might have noted that the leaving classes (e.g. Form 4, Form 6, and Std 7) have not been included in the automated promotion panel. This is normal as the students in these classes need not be promoted but rather turned into alumni. Consult the Confirmation of leaving classes section for explanation.

Note that the system promotes all the students of the target classes. If there are some students who should not be promoted at the school's discretion then you should return these students to their old classes by editing their individual files after everyone has been promoted. To achieve this, launch the automated promotion mechanism as usual, then go to the students' dashboard. Search for the students you want to demote individually, go to their files and click the 'Edit student details' at the bottom of the file. Select the respective class and stream you want the student to go to and save the file. With immediate effect the student will be marked as a student of the class you have specified.<sup>7</sup>

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<sup>7</sup> This technique can also be used to transfer individual students around classes in the system.



### **Class transfer**

Transferring a single student from one class / stream to another has been explained in the previous paragraph. But when you want to move all the students in a certain stream to another stream and this is tool might come in handy. For example you have Form 1 A, B, C and D and you want to merge the students in two streams only. The developer could also issue you some instructions on using that tool for troubleshooting purposes. It is self-explanatory, but exercise caution on using it. You might want to consult the system developer and take system back up before attempting to use this tool.

## **ALUMNI DASHBOARD**

The ISO SAS lets users to access information about students who have already left the school via the alumni dashboard. In this context an alumni refers to a student who is no longer a current or active student of the school for any reason. Alumni are not visible / accessible from the students dashboard and thus to access information pertaining to them you should use the Alumni Dashboard. Its link is in the navigation panel. Their files are also marked as Alumni file and not Student File. Even with alumni, you can still access attached documents and all previous payment records for the student.

The alumni dashboard has two main features which are confirmation of leaving classes and a search / alumni list tool that behaves exactly like its counterpart in the students' dashboard.

### **Confirmation of leaving classes**

When students in the leaving classes (example Form 4, Form 6) complete and graduate, they should no longer be marked as students but rather alumni. This operation aims at doing just that. By clicking the corresponding button for confirmation of a leaving class in the alumni dashboard, all students in that class in that year are automatically marked as alumni and their reason for leaving the school is set as completed. For example, clicking the button 'Confirm leaving Form 4' during the year 2015 sets all students of Form 4 2015 as alumni. This operation cannot be reversed, but note that an alumni can be converted back to a current student by reinstating him / her from the alumni file.

## MANAGING PAYMENTS

The most crucial function of the ISO School Administration System is to manage students' school fees payments. At this juncture it is important to note that in the default current version the system only deals with yearly fees payment as depicted by the specified fees structure, or for the configured sub accounts. One – time payments such as for purchase of uniform etc. are not supported.<sup>8</sup>

*Please go through the School Fees Structure section first.*

### PAYMENT RECEIPTS

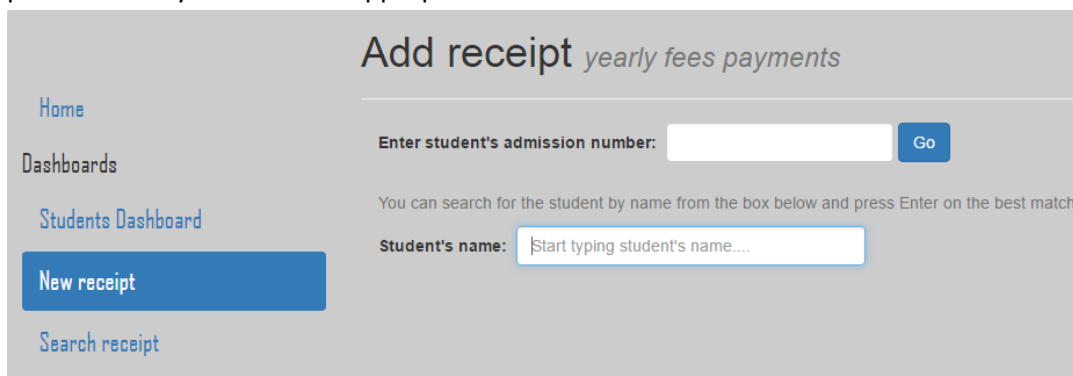
The primary method through which the ISO SAS receives information concerning student's payments is via payment receipts. When a student has paid for school fees or a sub-account payment via a supported payment method and presents the proof of payment / cash to the school then the payment information should be recorded in the system and the system will issue a receipt to the student.

The information in these receipts is later on used to generate detailed student's payments reports for a the respective student, to prepare payment status reports showing list of students in a class and their status of completion of school fees and also to generate daily fees collection reports. Furthermore, the same information is used to generate revenue reports for the school over a specified time period.

#### Adding receipts

To store information about a payment done by the student, you have to add the receipt into the system. To do so you should first pinpoint /select the student, that is specify the student you are going to add a receipt for. There are two approaches to this:

1. From the navigation panel, click 'New Receipt' and an interface similar to Figure 5 will appear. You can then start typing any of the student's first, middle and surnames and the system will provide you with matching options as you type. Navigate through the list using arrow keys and press Enter key twice on the appropriate student.



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**Figure 5: Directly entering the student's name for issuing receipt**

<sup>8</sup> A customized solution for one-time payments handling can be developed for the school in question. Contact system developer.

- When presented with search results from the students' dashboard, you can click the 'Add payment' button from the dropdown adjacent to the student. That would directly open the interface to add a receipt for the corresponding student.

**Students dashboard** *search and manage current students*

Search for students or obtain student list by using the controls below.  
Position mouse over an element for description

Names:  Middle name  Surname

Admission number:

Form:

The search returned 4 students

S/N	ADM. NUMBER	STUDENT'S FULL NAME	SEX	CLASS	
1	732	CHARLES CHACHA	Male	Form 6 B	<input type="button" value="View file"/>
2	734	CHARLES M MOSET	Male	Form 6 B	<input type="button" value="Add payment"/>
3	733	CHARLES M MTATIRO	Male	Form 6 B	<input type="button" value="View file"/>

Figure 6: Searching for a student from the dashboard and selecting the student for issuing receipt.

After selecting the student, the system will provide you with a page showing you the student's name and class <sup>9</sup> just to be sure and an interface to enter the receipt / payment details. Additionally if the student has a debt from a previous year the system will notify you so that you can use the Advanced receipt mode. These include:

- For schools using sub-accounts, the account associated with the payment.
- The amount of money paid by the student. This is to be specified in numerals only. Commas can be used for your own convenience as mistakes in placing commas will not affect the amount recorded by the system. No other characters such as spaces within the amount are allowed, and including them will result in an error.
- The payment method used. This is specified through the selection box next to the amount, where you choose the appropriate entry from the list. Default is Bank (meaning bank pay-in slip or deposit) therefore you do not need to change this field if it is a bank payment.
- The date the payment was made. If the system has been configured to use this feature, you can specify the date that for example the bank deposit was made so that your revenue reports

<sup>9</sup> Note the class shown here, it should be the intended class of the student. If a student is in Form 1 awaiting promotion and you are entering school fees payments for form 2 (the next year) then promote the students first

coincide with the bank statements, otherwise the system will use the current computer time if valid.

- The transaction reference, if the system has been configured to use this feature. This is optional for some payment methods such as cash and you can leave it blank otherwise it should be a required unique identifier of the transaction such as bank pay-in-slip number or M-Pesa transaction number.
- Optional elements in the school fees structure of the student's current class. Here you get to choose which elements the student is paying for and should thus be billed accordingly. Tick the checkboxes corresponding to the elements that the student is paying for and leave the others unmarked. The chosen elements will show up in the resulting printable receipt if configured so. Note that these options will only be shown once you select the main (school fees) account as the payment account where applicable.

Dashboards

Payment by ISACK NG'ANG'A SHAYO, Form 1 A Advanced Mode

Students Dashboard

New receipt

Search receipt

Alumni Dashboard

SMS Dashboard

Reports

DFC Reports

Payment account: Select one

Paid amount: Bank

Enter the amount paid. You may use commas at (and for) your convenience.

Paid on: dd----yyyy

Transaction reference:

Submit payment

Figure 7: Sample receipt adding interface, yours doesn't have to be this complex!

After you are done entering the payment details click the submit button. The system will record the details of the payment, process them and generate a receipt page showing the relevant receipt information. You can choose to print the updated debt amount alongside the receipt. Consult the Revoking receipts section on what to do if a mistake was made in entering the receipt details.

### Advanced receipt mode

This is used to add payments for previous years' fees using money paid during the current year. For example if the system alerts you that a student has a previous year's debt, click 'Advanced Mode' link next to the student's name, provide the receipt details and choose the past year as the payment year. You would have effectively used the current year's receipt to cover for a previous year's debt, and the receipt itself would indicate so. Also, from here you can access the phantom receipts interface.

### Phantom payments / receipts

Phantom payments are used in a variety of cases. Basically, they are a way to reduce the debt amount for a student. Phantom payments find application in various cases such as scholarships, concessions,

fees discounts to students transferring in the middle of the year etc. and are only applicable for the main (school fees) account. Because of their potential to cause ruckus, they have to be specifically configured upon request and a user needs special system permissions to be able to create / remove phantom payments.

Suppose you want to add a concession for a student, follow the steps as if adding a normal receipt, go to advanced mode and if you have the necessary permissions there will be a button leading you to the phantom receipts interface. There you can enter the amount, the class year and a description not less than 15 characters in length. Then you can submit the phantom payment.

Because they are not based on real money, phantom receipts cannot be printed. They are specifically indicated in the student's payment report and payment status reports and when revoked (removed or cancelled) no record is kept contrary to normal receipts. Furthermore, they don't affect any of the revenue reports.

### Printing receipts

The receipts generated have been optimized for printing on half of an A4 sheet. That means one A4 sheet of paper can produce two receipts. You can insert the whole sheet of paper, print a receipt and cut it afterwards or you can prepare many sheets of half A4 size and set them ready in the printer slot. You do not need to change your printer page size settings, but ensure that you have unchecked the option for printing headers and footers otherwise there will be some unwanted text in the receipt.

After you have added a receipt, a page will materialize telling you that you can now print the receipt. Use your browser's printing mechanism to accomplish this. In most cases, pressing the keyboard shortcut Ctrl + P launches an interface letting you print pages. Select the printer and ensure page size is A4 and print the receipt. After printing, you can stamp and/or sign it to establish authenticity.

If you do not want to or cannot print this receipt immediately then you can navigate to other pages and continue using the system and even add other receipts as usual because you can always reprint the receipt at a later point in time. The next section describes how.

### Viewing and printing past receipts

You can access the details of a previous receipts / payment made by a student and even reprint that receipt at a later time or revoke it if it was mistaken. To access a receipt details, you should provide the receipt number assigned by the system in the 'Search receipt' interface accessible from the navigation panel. If the receipt number is not known then you can view the respective student's payments records and access it from there by clicking the blue link representing the receipt number in the receipts table. This should take you to a page showing the full details of the receipt unless otherwise the system responds with a 'Receipt not found' error meaning that the receipt is invalid and was never added into the system (view the student's payment details for clarification). There is a shortcut link for accessing the respective student's file from this page.

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To print the receipt, press the 'Print receipt' button. This will regenerate the original receipt and you can print it as you would any other receipt. The due amount indicated in the receipt will be the current one.

## Revoking receipts

The system allows normal users to revoke mistaken receipts within 48 hours since they were added. That means when you make a mistake in a payment receipt entry either by choosing the wrong student or entering the wrong amount then you can remove that receipt within 48 hours, after which you would have to consult a system administrator or the developer for assistance as the system will prevent you from revoking the receipt.

By revoking a receipt you remove it from the student's payments and school revenue therefore it won't affect the schools finances. This means you cancel that payment in the system. After revoking a receipt you can now add a new receipt in the student's name having the correct data.

***Note that payment receipts cannot be edited or transferred from one student to another, but a mistaken receipt can only be revoked.***

If you search for a revoked receipt using the receipt number in the 'Search receipt' interface the system will provide you the details and will clearly indicate that this receipt was revoked.

Phantom receipts need special permissions to revoke them, and no record is maintained for revoked phantom receipts.

## PAYMENTS & FINANCIAL REPORTS

The ISO School Administration System has various reports aimed at providing users with summary and detailed information about students' payments and the school revenue. All these reports can be printed on paper by the system. Additionally the reports also support traditional copy/paste capability into MS Excel therefore you can select (highlight) and copy any range of rows shown in a report and paste it into MS Excel.<sup>10</sup>

They include:

- Student's detailed payment analysis
- Payments status reports
- School Revenue reports
- Daily Fees Collection reports (DFC)

### Student's detailed payment analysis

This report enables the user to view the details of a single student's school fees payments in the current or any other previous year. It shows the payments received from the student in form of payment receipts, if present the phantom payments added for the student during the year and their descriptions, breaking down that total amount received to the elements in the school fees structure and ultimately providing the summary on the standing of the student in that year relative to school fees payments.

To view this report, get to the student's file (refer to the Viewing student files section). At the very bottom of the student's file there will be a button labeled 'View payments'. Clicking it will take you to an interface allowing you to choose the class and year to view the payments made by the student in that respective year. The system figures out the previous classes the student was in from the payments that the student made, and will work correctly even for students repeating a class. **Note that if a student was in the school during a certain year but never made any school fees payments in that year then it won't show up. The system assumes the student was not in school during then.** After selecting the class year, click the 'Get payments' button to continue. The student's payment details for the year will be shown as exemplified below in Figure 8.

The first table shows the receipts / payments made by the student in that year, the dates and their respective amounts. Phantom payments added for the student will also show up here along with their descriptions. The amount from phantom payments is added to the total amount from receipts to get the total fees paid. To view a receipts details, revoke or print it click the link represented by the receipt number. Refer to the Viewing and printing past receipts section.

For schools with sub-accounts, there will also be a table similar to the first, showing the receipts for the sub-account and the total amount of money the student paid into the account.

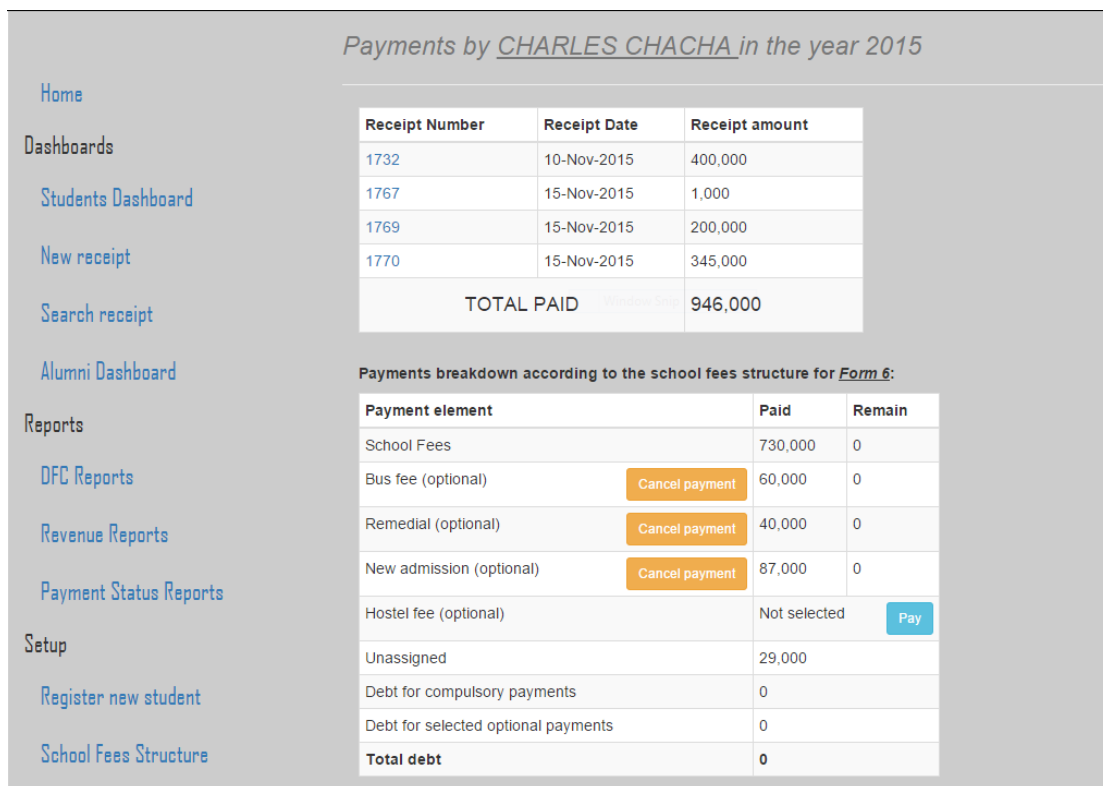
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<sup>10</sup> When pasting an extract of a report from the SAS into Excel, Right click on the destination cell then click Paste Special, and select 'Text' or 'Plain Text' or 'Values' to get the data only without the formatting

The second table shows the breakdown of the student's school fees into the school fees structure elements for the class that the student was in during the respective year. This is pretty self-explanatory as the system takes the total amount of money paid and compares it with the elements in the school fees structure. All compulsory elements will be used to bill the student, but optional payments have to be 'selected' meaning that you must first tell the system to bill the student for that optional element. You can do so by clicking the 'Pay' button corresponding to the element and immediately the system will generate an updated report within which the student is billed for the optional element. To cancel the billing of an optional payment, click the 'Cancel Payment' button corresponding to the element.

If the amount of money paid is not enough for the compulsory elements then the amount due is indicated as debt for compulsory payments. Likewise for the selected optional payments, the amount due is indicated as debt for selected optional payments. The total debt for compulsory and optional payments is indicated as 'Total debt' and that is the amount due for the student during the year.

In the event that the total amount paid by the student exceeds the student's bill according to the fees structure, the extra amount is indicated as unassigned. Currently the system does not offer refunding or carrying forward of balances in successive years, so it should be done manually e.g. through phantom payments.



24 **Figure 8: Student payment details**



## Payment status reports

These reports show the summary of student's payments in the current class year per class. It can be mostly used to find out the students who have not finished paying the school fees or who have not reached a specified amount threshold at any point in time.

To generate such a report click the 'Payment status reports' button in the navigation panel. This takes you to a page allowing you to select the classes you would like included in the report, whether you want a report for the school fees payments or a sub-account and the required class year. Click the 'Get report' button when done.

The report in its default form shows the following:

- Names of students who were in the class during the respective year and their current classes and streams. The students are sorted / arranged first in streams in ascending order, followed by sex: female before male and finally alphabetic order of the student names.
- Total amount paid by the student during the class year. Including the phantom amount.
- Total debt for the year.

You can customize the report by altering the report options shown on the top of the page and clicking 'Regenerate report'. The following variations are possible:

- You can choose to show status of the student by using row colors / shading (fit for screen viewing but do not appear on printing) or using status markers - small symbols appearing next to the student's name which are optimized for printing. A key is also provided for what each color or symbol means.
- You can choose to indicate debt for a specific installment during the year instead of the whole year debt. The system will use the fees structure and figure the debt automatically.
- You can choose to only view students with debts, so students who have completed fees for the installment will not be shown in the list. In addition to that, you can set a debt threshold so that only students with debts greater than the set threshold are reflected in the list.
- You can alter how the system combines and displays compulsory and optional payments. Experiment with these options to find one which suits a particular purpose.

The system will also display the grand totals for the class i.e. the total amount paid by students of the class and the total debt for students in the class. Note that the total amount paid does not include phantom payments.

Students who have phantom payments for that year will clearly be indicated by a warning triangle next to their amount paid in the payment status report. This makes it easy to follow up and ensure that the phantom payments feature has not been misused.

## MORE TO COME...

The user manual is not yet complete albeit almost done. A few things haven't been documented. Don't worry we will be completing it in the next few releases. What has been documented is more than enough to get you started, and in case of any clarifications feel free to contact the developer.