

User Definition Codes User Guide



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User Definition Codes

User Definition Codes are used throughout PCSchool for both;

- Government Reporting
- Tracking information uniquely for a school

New Codes can be added as the need arises but the Category must be pre-entered via Utilities/Maintenance Codes under the Type of USERDEF.

Prerequisites

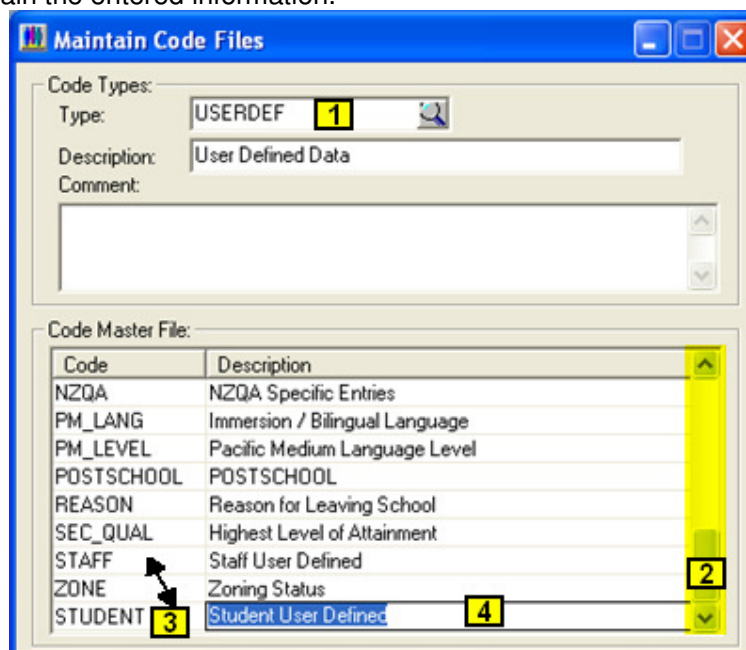
It is a Prerequisite that the;

- Category is entered in USERDEF.
- Alumni Activity Code needs to be created (If transferring to Alumni)
- User Defined codes must to be created

Category - USERDEF Code

Path: Scholastic → Utilities → Maintenance Codes

If you do not have Categories for Student, Family and Staff they can be created. Reports can then easily be run to obtain the entered information.

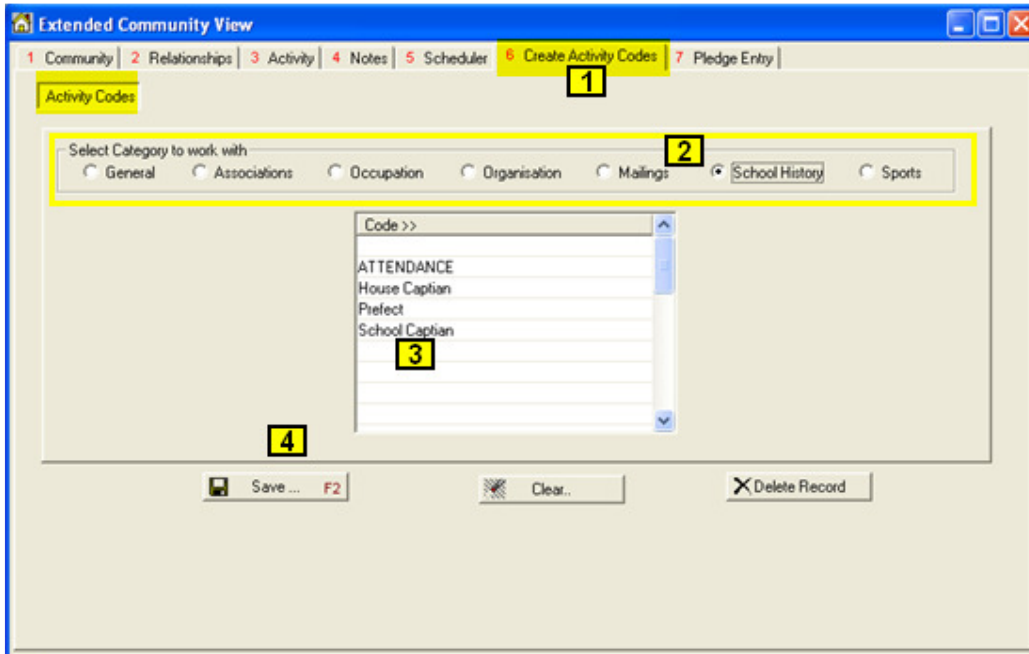


1.	Select the category Type of USERDEF.
2.	Take the slide at the side to the bottom.
3.	Enter the new category Code, Student, Family or Staff, whichever is missing.
4.	Enter your description; <ul style="list-style-type: none"> • Tab off the line • Refresh the screen • You will not be able to see the new Codes until the screen is refreshed.

Alumni Activity Code

Path: Foundation → Community → Extended Community View

If you wish the User Defined entry to be retransferred to the Alumni it must be attached to an Alumni Activity Code.

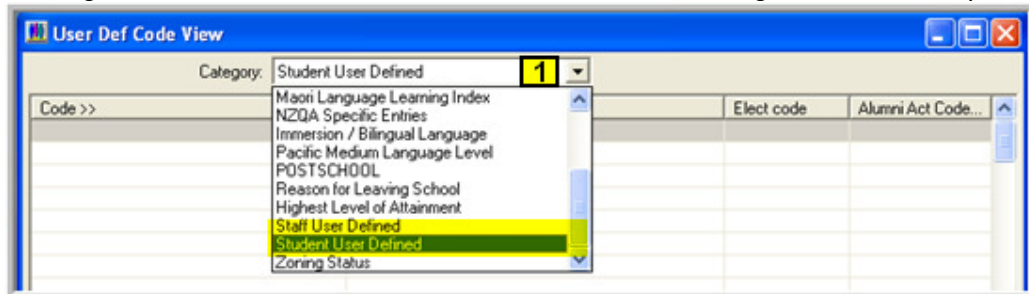


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| 1. | Go to the Create Activity Code. |
| 2. | Select an option. |
| 3. | Enter a Code and tab off the line. |
| 4. | Click Save. |

Create the User Defined Codes

Path: Scholastic → System Functions → User Definition Codes

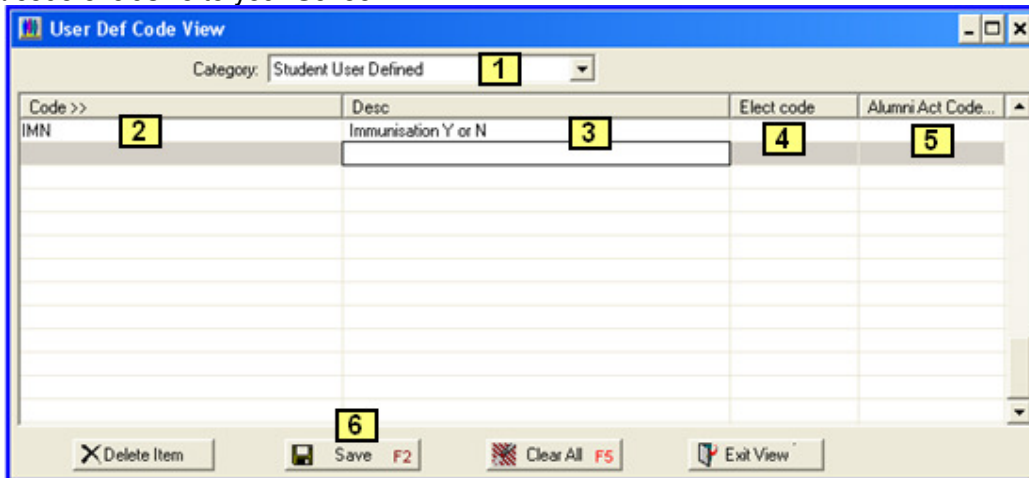
Once the Categories have been created new Codes can be entered against them for reporting upon.



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| 1. | Click on the dropdown list and select the Category you are going to add the Code to. |
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Add Your Code

Set up a code exclusive to your School.



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| 1. | Click on the dropdown list and select the Category you are going to add the Code to. |
| 2. | Enter a unique code. |
| 3. | Enter your description for the code. |
| 4. | Optional; If this is for Government Reporting enter the correct Electronic Code if applicable. |
| 5. | Optional; If this is to be Transferred to the Alumni select the Alumni Code you created. |
| 6. | Click Save when finished. |

Allocate the Codes

Codes can be Allocated to;

- Students
- Family
- Staff

Students

When allocating Codes to Students they can be done:

- Globally
- Individually.

Globally

Path: Scholastic → Administration → Quick Student Data Entry

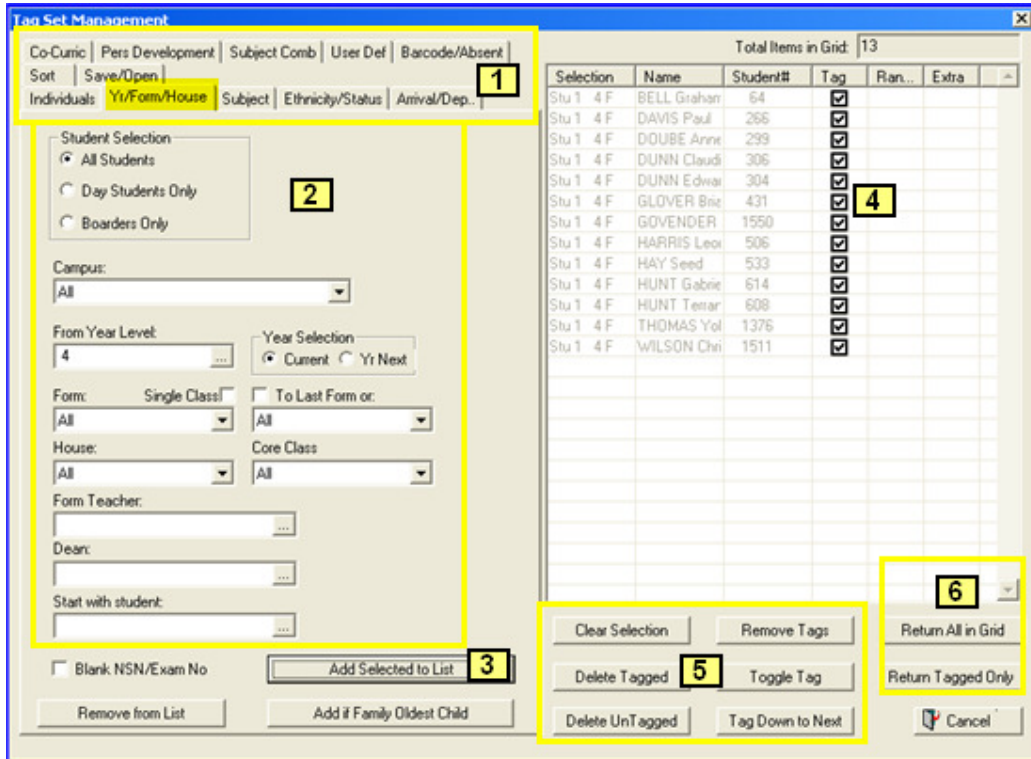
Step 1

Go to the User Def tab to select the Students.

- Tick to Use a tag Set

Step 2

You can use filters to select the Students.



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| 1. | Select the best tab to aid in the selection of Students. |
| 2. | Use the available filters for further defining the Students. |
| 3. | Click Add Selected to List. |
| 4. | Students can be tagged or untagged manually. |
| 5. | Buttons can be used to aid in Tagging Students. |
| 6. | Click the appropriate button. |

Step 3

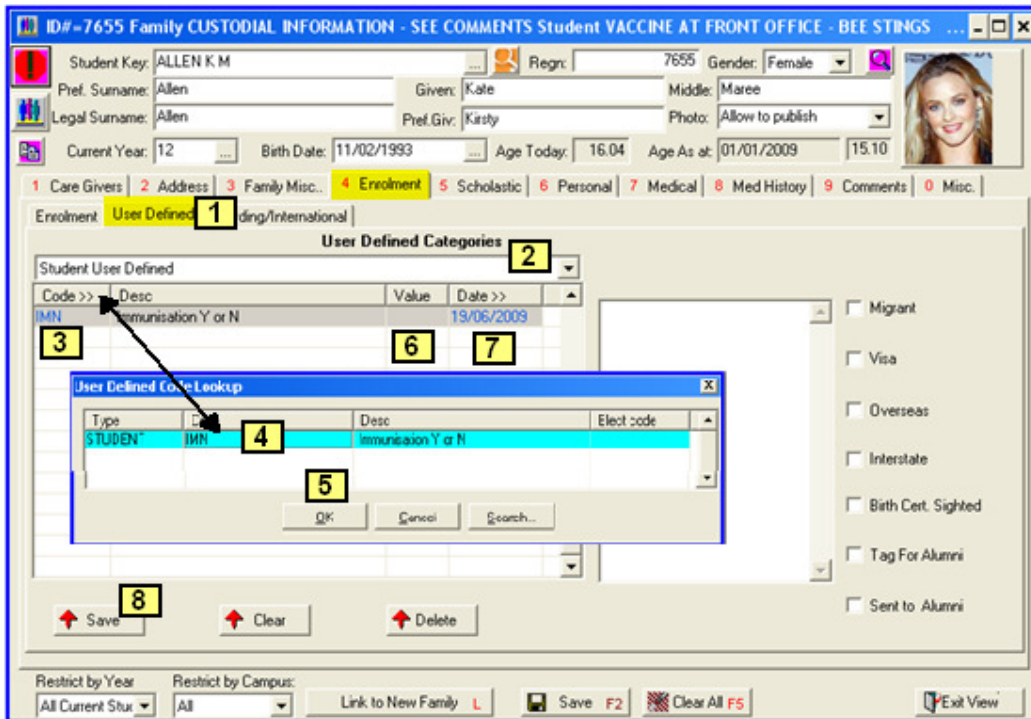
Add the Code to the Selected Students.

1.	View the amount of Students Selected.
2.	Select the Category.
3.	Select the Code to add.
4.	The date will default and can be changed.
5.	Optional: Enter a comment.
6.	Optional: A Value can be entered such as Yes, No, Send, 100, \$100.00, this is a Freeform Value.
7.	If the Code is to be removed from the Students check the box.
8.	Click Begin when finished.

Individually

Path: Scholastic → Administration → Student View → Enrolment

Go to the User Defined tab.

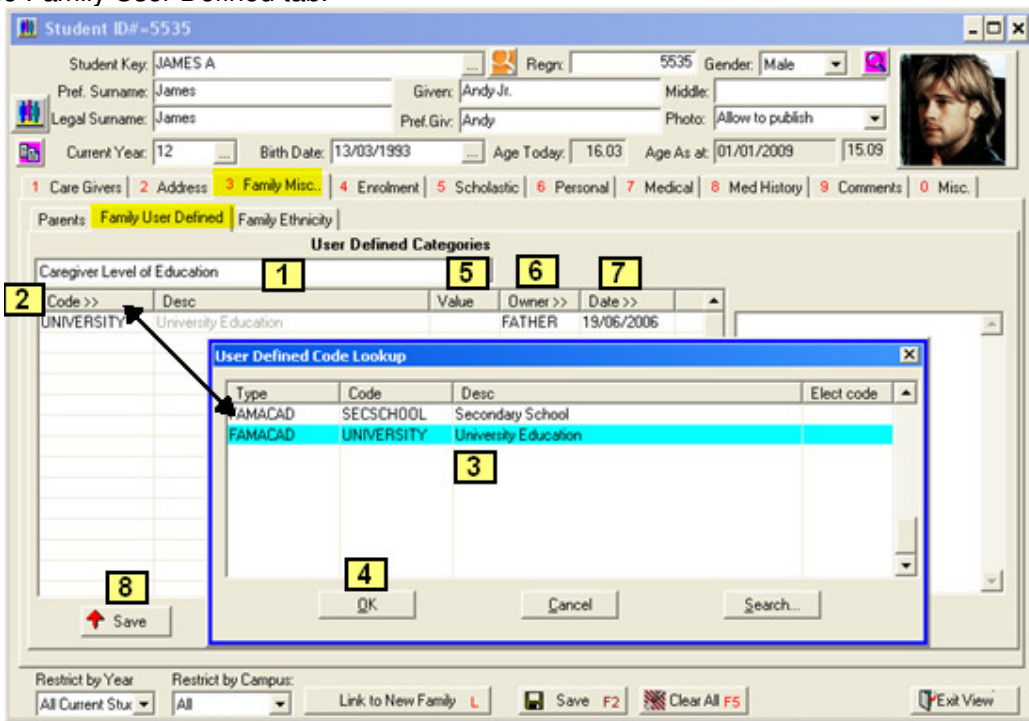


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| 1. | Go to the User Defined tab. |
| 2. | Click the Dropdown menu and select the User Defined Category you are adding the Code to. |
| 3. | Click the word Code. |
| 4. | Highlight the Code to add to the Student. |
| 5. | A Value can be entered such as Yes, No, Send, 100, \$100.00, this is a Freeform Value. |
| 6. | The date will default to today's date, this can be changed. |
| 7. | Click OK. |
| 8. | Click Save when finished. |

Family

Path: Scholastic → Administration → Student View → Family Misc

Go to the Family User Defined tab.

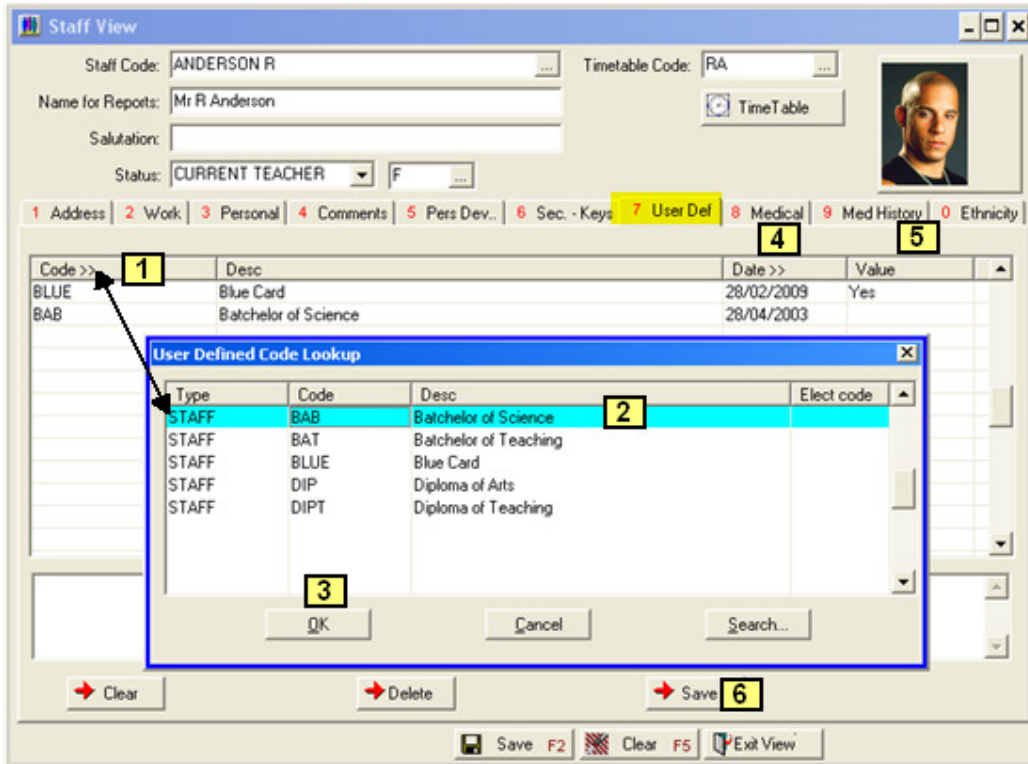


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| 1. | Select the Category holding the information to add to the Family. |
| 2. | Click the word Code. |
| 3. | Highlight the Code to add to the Family. |
| 4. | Click OK to add the Code. |
| 5. | A Value can be entered such as Yes, No, Send, 100, \$100.00, this is a Freeform Value. |
| 6. | Optional; If this code is relating to a particular Family member select the member. |
| 7. | The date will default to the current date and can be changed. |
| 8. | Click Save when finished. |

Staff

Path: Scholastic → Administration → Staff View

Go to the Staff User Defined tab.



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| 1. | Click Code. |
| 2. | Highlight the Code to add to the Staff Member. |
| 3. | Click OK. |
| 4. | The date will default to today's date, this can be changed. |
| 5. | A Value can be entered such as Yes, No, Send, 100, \$100.00, this is a Freeform Value. |
| 6. | Click Save when finished. |

Reports – User Defined

Path: Administration → User Defined Report

Reports can be created for all the User Defined fields entered.

1.	Select either the Student, Family or Teacher tab.
2.	Optional; select any filters.
3.	If you are going to select a Code, selecting the category first will reduce the list.
4.	Optional; Select a Code.
5.	Optional; Filter by selecting a date From and To.
6.	Select a report; <ul style="list-style-type: none"> • User Defined by Code will print the Codes with a Student list. • User Defined by Students will print a Student with a list of the Codes attached to the Student.
7.	Click Print when all the filters are in place.

Sample Report

Student User Defined by Code – Name (Alias) UDSEFTCD.RPT

Student User Defined Listing by Code		
STUDENT	IMN	Immunisation Y or N
Bell Graham		Year: 4 Y
Davis Paul		Year: 4 Y
Doube Anne		Year: 4 N
Dunn Claudia		Year: 4 N
Dunn Eddie		Year: 4 Y
Glover Brian		Year: 4 N
Govender Geshanti		Year: 4 Y
Harris Leonard		Year: 4 N
Hay Seed		Year: 4 Y
Hunt Gabrielle		Year: 4 N
Hunt Terry		Year: 4 N
Thomas Yoie		Year: 4 Y
Wilson Chrissie		Year: 4 Y
Total: 13		

User Defined by Student – Name (Alias) UDEFSTUD.RPT

Student User Defined Listing		
Code	Description	Value
Allen Kirsty		
PAYMENT	Payment to NZQA	75
IMN	Immunisation Y or N	
NAPP	Not Applicable	
Allen Lydia		
IMN	Immunisation Y or N	N
NAPP	Not Applicable	
Anglesey Jack		
IMN	Immunisation Y or N	
NAPP	Not Applicable	