
Guide

Scanning and ASCII Transfer

Win School®
Version 4.2

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Introducing Scanning and ASCII Transfer

Overview

You can enter data into Win School using Scanning or ASCII Transfer. Use the Scanning module to read scan forms to import attendance, marks, or course requests into Win School.

Use the ASCII Transfer module to import data from another program into Win School, such as from a spreadsheet application. You can also use ASCII Transfer to transfer data between schools.

Getting Technical Support

Chancery's support programs are available by subscription and include the below services.

Technical Support	solves problems and answers questions when software doesn't produce the expected results. Monday to Friday, 5 am to 5 pm Pacific Time phone: 1-800-688-9939 fax: 1-800-346-0643 email: techsupp@chancery.com website: http://support.chancery.com
Web support	Chancery's website includes a searchable knowledge base with frequently asked questions, tips, and troubleshooting, as well as support forums for users to share experience and knowledge. Web tutorials are available on an annual subscription basis.
Software updates	releases of new versions with improved functions and software fixes. Updates are provided free of charge for 3 months from your date of purchase and are included in the subscription to Chancery Support Programs.

For more information on Technical Support Programs, call Chancery Customer Service at 1-800-999-9931 extension 130.

Providing Feedback

To improve the quality of your documentation, we would like your comments regarding this guide. Email comments to Chancery's User Education department at user_docs@chancery.com.

Using Scanning

Overview

Use Scanning to import data into your Win School database with an optical scanner and paper forms. Only optical scanners work with the scan forms, not digital scanners.

Use Scanning to import the following information:

- Either once or twice daily. To scan class attendance, classes must Daily attendance, by class or homeroom. Scan in class attendance by period, and homeroom attendance be scheduled with Scheduler.
- Marks, by class or by student.
- Course requests. Scan in course requests if classes are scheduled with Scheduler.

This section provides terminology and concepts used in scanning, followed by procedures for scanning attendance, then marks, then course requests.

What You Should Already Know About Scanning

To use the Scanning module, you need a basic understanding of the following:

- A form file is a software file. A scan form is a paper form that a scanner reads into the Scanning module according to instructions in the form file.
- Entering data on scan forms, and inserting scan forms correctly in the scanner.
- Operating and configuring your scanner, including how to connect your computer and scanner, and how to define the communication settings for the scanner.
- The meaning of: baud rate, parity, stop bits, data bits, and serial port.
- Attendance terminology for scanning attendance data.
- Scheduling terminology for scanning course requests.
- Report card terminology for scanning marks.

If you are unfamiliar with your scanner, read its operating manual. If you are unfamiliar with terms or features used by other Win School modules, read the guides for those modules.

Processing Scan Forms

You follow a different procedure for each of the 3 types of scanned information: attendance, marks, student requests.

In each procedure, the stages of the process are:

- create a form file
- print the form
- distribute copies of the form to teachers or students, who mark it and return it to you
- run the marked forms through the scanner, which translates it into data that Scanning can read, then saves it in the Win School database

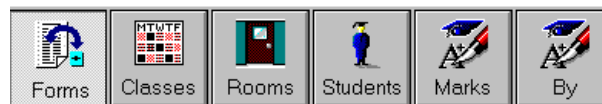
The form file defines the type of data, scanner, and scan form for a scanning job. When you create the form file, you define Win School codes to correspond with the bubble marks on the scan form.

- Create 1 form file for each scanning job. Only 1 form file opens at a time.
- Scan data only to the computer where you created the form file. Scanned data is stored in a separate folder located on the hard drive. See “Backing Up Data in the Scanform Folder” on page 4.

Use form files only with the Win School database for which they were created. Do not use form files created with 1998 data for 1999 data, for example. Create new form files for 1999.

Displaying Information for Scanning

The Main window has 6 icons that allow you to display lists of items, such as classes or students, for scanning.



If icons are dimmed, it means a form is open. From the File menu, choose Close to close the form and make the icons available.

Click	To display	To scan
Forms	Form files list	n/a
Classes	Classes by term	Attendance by period
Rooms	Homerooms	Daily or twice-daily attendance

Click	To display	To scan
Students This icon is dimmed if course numbers are not numeric or unique, and if student numbers are not numeric.	Students	Course requests
Marks	Classes by term	Marks
By	Students	Marks

To open and close forms:

- 1 In the Main window, click the Forms icon.
- 2 Double-click a form name to open it. A checkmark in the Status column indicates a scan form has been printed for the item.
- 3 To close the form file, choose Close from the File menu.

To display rosters:

- 1 Double-click a class or homeroom in the Main window to open a roster window with a list of students.
- 2 Click the Class icon to list the students currently in that class or homeroom, based on student timetables in Scheduler or homeroom assignments in Details.

Click the Form icon to list the students who were in the class when its scan form was printed. The students are listed in the order in which they were printed on the scan form.

Click the Comparison icon to list all students who are in the Class Roster or the Form Roster.

- 3 If a student is in the class roster, a checkmark appears in the In Class Roster column.

If the student was enrolled in the class when the scan form was printed, a checkmark appears in the In Form Roster column.

Backing Up Data in the Scanform Folder

Scanning saves form file data to the Scanform folder. At installation, Win School automatically creates the Scanform folder in the Win School folder on the hard drive.

Manually back up the Scanform folder on a regular basis. Backing up the data folder does not back up the Scanform folder. Back up the Scanform folder separately.

- Scan data from the same computer you used to create your form files, because the Scanform folder is stored on that hard drive.

- Leave the Scanform folder on your hard drive. Do not move it to a shared folder on a network server. Form files are not designed for multi-user applications.
- Use form files only with the Win School database with which they were created.
- Create form files for each database you use.

Deleting Form Files

Delete unwanted form files to free up disk space and to better manage files.

When a file is deleted, the scan forms created from the file cannot be used again. Before deleting a form file, ensure you have scanned in all data.

To delete a form file:

- 1 In the Main window, click Forms to display a list of all forms files.
- 2 Select the forms to be deleted.
- 3 From the File menu, choose Delete Form File.

Filling in Scan Forms

- Use a soft lead pencil to fill in bubbles. A number 2 pencil is recommended. Scanners are light sensitive to the graphite in pencils, not to other materials.
- Erase changes and stray marks completely.
- Do not fold scan forms. If a form is creased, you can flatten it out and attempt to scan it. If it doesn't scan successfully, enter its data manually, or complete a new scan form.

Replacing Lost, Spoiled, or Outdated Scan Forms

You may need to replace a scan form if it is lost or unreadable, or if its roster is out of date because of timetable changes.

To check the scan form:

- 1 To check whether scan forms are accurate, open the form file.
- 2 From the Scan menu, choose Verify Scan Forms.
- 3 If you get a message that class information has changed, compare the scan form roster with the current class roster. Double-click a selected item, then click Comparison.

Replace the scan form if the differences are significant.

Replacing a Scan Form

If you need to replace a scan form, follow the procedures for printing scan forms, using either the Print Scan Forms or Reprint Old Scan forms commands from the Scan menu.

- To print a scan form with an up-to-date class roster, choose Print Scan Forms from the Scan menu. Do not scan data from the old scan form.
- To print the most-recently printed version of the scan form, even if it does not have the latest class roster, choose Reprint Old Scan Forms from the Scan menu. If you find the old scan form later, you can use it.

Setting Up Scanning

Setting up involves 2 tasks:

- checking that Win School data used for scanning is correctly entered and up-to-date.
- checking that communication settings for the scanner and the Scanning module match.

Depending on how frequently you scan data and change scan forms or scanners, do these tasks once, or each time you scan data. You can scan attendance data daily using the same scanner and form, for example, or you can scan course requests once a year, using a different scanner and form each time.

Setting Up in Other Modules to Prepare for Scanning

Check that the following data is correctly entered in each Win School module.

School Setup

- Set Scheduler Terms
- Timetable Structure
For attendance taken by class, or by homeroom twice-daily.
- Attendance Structure
- Daily Attendance Codes
For attendance taken by homeroom, once a day.
- Period Attendance Codes
For attendance taken by class, or by homeroom twice-daily.
- Daily Calendar
- Report Card Bins
- Course Numbers
Select the Unique and Numeric options to scan course requests.

- Student Numbers
Select the Numeric option to scan course requests.

Details

- Course Name
- Course Number
- Show in Attendance
- Show in Report Cards
- Teacher Name
- Teacher Number
- Teacher's Homeroom
For attendance taken by class.
- Student Name
- Student Number
- Student's Homeroom
For attendance taken by homeroom.

Scheduler and Report Cards

- To scan attendance by class, schedule classes in Scheduler.
- To scan marks based on classes, create classes in Scheduler or Report Cards.

Configuring Your Scanner and the Windows System

Make sure your scanner and the Scanning module can communicate. The communication settings must be identical in these 3 areas:

- The scanner used to scan data
- The Windows system running Win School
- The Scanning module

Determining the Correct Communication Settings

Communications settings include: baud rate, parity, stop bits, data bits, and the serial port. To determine what the settings should be:

- Use the settings listed in the manual that comes with the scanner.
- Use the default settings displayed in the Scanner Setup dialog in Scanning. The first time you start Scanning, the factory settings for each scanner Win School supports are listed in this dialog.

To configure	Do this
Your scanner	Follow the instructions in the manual that comes with the scanner.
Your operating system	In the Control Panel, find the dialog that lists the communications settings for the port you are using and enter the correct settings.
The Scanning module	Start Scanning. From the Scan menu, choose Scanner Setup. From the popup menus, select the scanner and form you are using. Default communication settings for that scanner are displayed.

Scanning Attendance

Scan attendance by homeroom or by class.

- homeroom attendance is taken once a day or twice-daily
- class attendance is taken in the period that class occurs
- you can scan either twice-daily attendance or class attendance, not both

If you scan a class that is scheduled over more than 1 block, the students get 1 attendance code for the multiple blocks. Multiple-block classes with a single letter block are treated as 1 period and are assigned 1 attendance code.

Stage 1: Creating an Attendance Form File

The form file defines the type of data, scanner, and scan form, and which attendance codes correspond to the bubble marks on the scan forms.

To create a form file:

- 1 In the Main window, click Forms, or close open form files.
To scan attendance by homeroom, click Rooms.
To scan attendance by class, click Classes.
- 2 From the Scan menu, choose Scanner Setup, and from the top 2 popup menus, select a scanner and a scan form.
Make sure that the communication settings are the same as those selected for the scanner, then click OK.
- 3 From the Scan menu, choose Form Setup.
The information in the Form Setup dialog varies depending on the scan form selected, and on selection of Rooms or Classes. Settings in the checkboxes can affect values in the popup menus.

Select Print Student Numbers on form to print student numbers on the scan form.

Select Use Semi-Daily Attendance (AM/PM forms) to take attendance twice daily. Two scan forms are printed for each homeroom: 1 for morning attendance, the other for afternoon attendance. This checkbox only appears when scanning homeroom attendance.

Select from the popup menus for the bubble combinations on the scan form, then click OK.

- 4 If you are scanning attendance by class, select the term from the menu under the icons.

If you are scanning attendance by homeroom, go to the next step.

- 5 From the File menu, choose New, type a file name and description, then click OK.

If the form setup is correct, click OK.

- 6 In the Assign Attendance Dates dialog, select dates to scan attendance, then click OK.

The new form file is listed in the Forms view.

Stage 2: Printing Attendance Scan Forms

Print a sample form to check for alignment errors, correct the errors, then print the scan forms.

To print a scan form:

- 1 Load the scan forms into your printer.
- 2 In the Main window, open the form file you want to print.
- 3 Select items, such as classes or homerooms, for scan forms printing.
- 4 Sort the selected items in the order you want to print them.
- 5 From the Scan menu, choose Print Scan Forms, then select the “Sample form to test printer alignment” and “Automatically” radio buttons. Click OK to display a sample scan form.
- 6 From the System menu, choose Print. Check alignment.
If the scan form is aligned correctly, close the displayed sample.
If you’re printing from a laser printer, use Win School margin settings as a guide. In the Shell, choose Margin Setup from the System menu and check the settings.
- 7 In the Scanning module, choose Print Scan Forms from the Scan menu, then select “Scan forms for actual use.”
If the form ID bubbles are not aligned accurately in the sample forms, select “Manually (by pencil).”
- 8 From the System menu, choose Print. Then close the window.

In the Main window, a checkmark in the Status column indicates a scan form has been printed for that item. If a homeroom or class selected for printing has no students, no scan form prints and no checkmark appears.

Stage 3: Completing Scan Forms for Attendance

To complete attendance scan forms:

- 1 Distribute the forms for attendance with instructions to the teachers on which attendance codes correspond to the bubble marks on the scan form. This was defined in “Stage 1: Creating an Attendance Form File” on page 8.

See “Filling in Scan Forms” on page 5 for general information. The following points are specific to attendance:

- If a student is no longer in the class but is still listed in the roster, leave the student’s bubbles empty. Do not cross out names.
 - If a student has transferred into the class but is not listed in the roster, enter attendance manually in the Attendance module, after scanning is complete.
 - If a week contains a holiday, or a class does not meet every day of the week, leave the columns for those days blank. Do not use scan forms for those days.
- 2 Collect completed scan forms and check that they have been filled correctly.

Stage 4: Scanning Attendance Data

After scanning the forms, use the Attendance module to view the scanned attendance data.

To prepare to scan the forms:

- 1 Make a backup of your Win School data, or check that a current one exists. In case of problems, you can restore data from a backup.
- 2 Check that the scanner and scan form match the ones defined for the form file. If they do not match, create a new form file and a new scan form with the correct scanner and form type. Then redistribute the scan forms.
- 3 Check that the scanner communication settings match those defined for the form file. If the settings do not match, record the scanner settings so you can edit the communication settings for the form file before you scan the data.
- 4 Turn on the scanner and position the scan forms in the scanner. Insert the scan forms in the correct direction.

To scan Attendance data:

- 1 In the Main window, open the form file for the data to be scanned.
- 2 From the Scan menu, choose Scan Printed Forms.

The Scanning Status icons show scanning progress.

Left-hand icon	Scanning ready to begin
Second-from-left icon	Scanning reading the form file
Third-from-left icon	Scanning reading data stored in scanner
Right-hand icon	Scanning writing data to Win School database

Select Auto-Scan Forms to use a sheet feeder and scan all forms without stopping. Deselect to scan forms 1 at a time.

Select Stop on Scan Error to stop scanning when an error occurs.

- 3 Check the Setup Information.

If the type of scanner and scan form are incorrect, click Close and create another form file with the correct scanner and form type. Then redistribute the scan forms to be marked again.

If the communication settings do not match, click Edit Setup. From the popup menus, select the correct settings, then click OK.

An asterisk means a day is selected for scanning.

Week 1	M:* T: W:* T: F:*
Week 2	M: T:* W: T:* F:

- 4 Click Edit Days to select days. Select “Replace Present Codes Only” to reduce scanning time. Scanning only scans the codes for students with a Present code in the Win School database, and assigns new codes if necessary. Deselect to scan data for all students.
- 5 Click Scan to begin form feed. If you are scanning forms 1 at a time, click Scan after inserting each form.
- 6 As scanning progresses, check the Scan Errors box for error messages. Click Stop to correct a problem and resume scanning, or find and re-scan the form if necessary.
To clear error messages, click Clear Errors.
- 7 To print error messages, click Close to close the Scan window, then choose Scanning Error Listing from the Reports menu. The report is displayed on your screen. Print the report, then reopen the Scan dialog.
- 8 When scanning is complete, click Close.

To check the success of scanning:

- 1 Generate a form status report.
- 2 In the Attendance module, check that the scanned data is displayed correctly.
- 3 If the scanning is not successful, check the error messages to correct the problem, then re-scan the forms with errors.

Generating Form Status Reports

Open the appropriate form file.

- To check the status of forms in a form file, select the classes or homerooms to report on.

From the Reports menu, choose Form Status Report, select constraints, then click OK. In the displayed report, N means not scanned, S means scanned.

- To check the status of 1 class or homeroom in a form file, highlight a class or homeroom with a checkmark in the Status column.

From the Scan menu, choose Form Status.

If you are scanning attendance twice daily, the status box displays status information for either AM or PM forms. To show the status of PM forms, choose Show ATD Status for PM from the Scan menu. Deselect to show the status of AM forms.

Scanning Marks

You can scan marks by class or by student.

Do not change class rosters from the time you create the form file until you scan marks. If you have to change class rosters, see “Stage 4: Scanning Marks Data” on page 14.

Stage 1: Creating a Form File for Marks

The form file defines the type of data, scanner, and scan form, and which letter grade, scores, and other codes correspond to the bubble marks on the scan forms.

To create a form file:

- 1 In the Main window, click Forms, or close open form files.
To scan marks by class, click Marks.
To scan marks by student, click By Student.
- 2 From the Scan menu, choose Scanner Setup, and from the top 2 popup menus, select a scanner and a scan form.

- Make sure the communication settings are the same as those selected for the scanner, then click OK.
- 3 From the Scan menu, choose Form Setup.
The information in the Form Setup dialog varies depending on the scan form selected.
Settings in the checkboxes can affect values in the popup menus.
 - 4 In the Value column, type up to 2 characters for marks or letter grades corresponding to the bubble combination on the scan form.
To specify whether the plus or minus sign is in front of or behind a letter grade, click the letter grade.
Select other options, then click OK.
 - 5 Select a term from the popup menu below the view icons.
 - 6 From the File menu, choose New, type a file name and description, then click OK.
If the form setup is correct, click OK.
 - 7 Select the bins you want to scan marks into, then click OK.
You return to the Main window and the name of the new file displays below the icons.

Stage 2: Printing Scan Forms for Marks

Print a sample form to check for alignment errors, then correct the errors and print the scan forms.

The procedure for printing scan forms for marks is the same as for printing forms for attendance. See “Stage 2: Printing Attendance Scan Forms” on page 9.

Tips for Printing Scan Forms for Marks

- Before printing, check the backup status of your Win School data.
- When selecting classes, we recommend you note which classes you do not select. In case a problem occurs, Chancery Technical Support can more easily recreate the necessary form files from your notes.

Stage 3: Completing Scan Forms for Marks

To complete the scan form:

- 1 Distribute the forms for marks, and instruct the teachers which letter grades, scores, and other codes correspond to the bubble marks on the scan form.

You defined this in “Stage 1: Creating a Form File for Marks” on page 12.

See “Filling in Scan Forms” on page 5 for general information.

- 2 Collect scan forms and ensure they are completed correctly.

Marks Comment Field

Different scan forms allow you to enter 1 to 5 comment numbers. Some forms list comment numbers from 1 to 36, making those comments available to teachers, who may bubble up to 5 of these numbers in the Comments field.

Other forms allow access to comments 1 through 999, but users can only select 1 comment for each Comments field.

Marks Period Absent Field

Some forms allow you to enter the number of periods where the student was absent from class. These fields list 0 - 9 in 1 row and 10 - 100 in the next row. You can select 1 bubble per row.

Stage 4: Scanning Marks Data

After scanning the forms, use the Report Cards and Query modules to view the scanned attendance data.

If a class roster has changed after printing and before scanning, choose Verify Scan Forms from the Scan menu.

For new students:

- From the Scan menu, choose Print Scan Forms to print an updated scan form. Fill out the new form and discard the old one.

OR

- Scan the form to enter marks for the other students, then enter marks manually for the new student.

To prepare to scan the forms:

- 1 Make a backup of your Win School data, or check that a current backup exists.
- 2 Check that the scanner and scan form match the ones defined for the form file.

If they do not match, create a new form file and a new scan form with the correct scanner and form type, then redistribute the scan forms.

- 3 Check that the scanner communication settings match those defined for the form file.

If they don't match, record the scanner settings, so you can edit the communication settings for the form file before you scan the data.

- 4 Turn on the scanner and insert the scan forms in the scanner.

To scan Marks data:

- 1 In the Main window, open the form file for the data to be scanned.
- 2 From the Scan menu, choose Scan Printed Forms.

The Scanning Status icons indicate progress on scanning the form:

Left-hand icon	Scanning ready to begin
Second-from-left icon	Scanning reading the form file
Third-from-left icon	Scanning reading data stored in scanner
Right-hand icon	Scanning writing data to Win School database

Select “Auto-Scan Forms” to use a sheet feeder to scan forms without stopping. Deselect to scan forms 1 at a time.

Select “Stop on Scan Error” to stop scanning if an error occurs.

- 3 Check the Setup Information.
 - If the type of scanner and scan form are incorrect, click Close and create a new form file with the correct scanner and form type. Then redistribute the scan forms.
 - If the communication settings do not match, click Edit Setup. From the popup menus, select the correct settings, then click OK.
- 4 Click Scan to begin form feed. If you are scanning forms 1 at a time, click Scan after inserting each form.
- 5 As scanning progresses, check the Scan Errors box for error messages. Click Stop to correct a problem and resume scanning, or find and re-scan the form if necessary. To clear error messages, click Clear Errors.
- 6 To print error messages, click Close to close the Scan window, then choose Scanning Error Listing from the Reports menu. The report is displayed on your screen. Print the report and reopen the Scan dialog.
- 7 When scanning is complete, click Close.

To check the success of scanning:

- 1 To check for forms not scanned, generate a form status report. See “Generating Form Status Reports” on page 12.
- 2 In Report Cards or Query, check that the scanned data displays correctly.
- 3 If scanning is not successful, correct the problem, then re-scan the forms with errors.

Scanning Course Requests

Scan forms for course requests have bubble combinations for course numbers. Students fill in their student numbers and the numbers of the courses they want. You don't need to print scan forms, just scan the completed forms.

Stage 1: Checking the Scan Form for Course Requests

Check that the course request scan form is correct for the scanner. If completed scan forms are incorrect, have teachers and students bubble in requests again on the correct forms.

To check that the scan form is correct for the scanner:

- 1 In the Main window, choose Scanner Setup from the Scan menu, then select your scanner from the first popup menu.

If you have not adjusted the default settings, the second popup menu displays the form number to be used with that scanner.
- 2 Check your scanner manual to be sure the settings are correct.

Stage 2: Completing Scan Forms for Course Requests

The following points are specific to filling in scan forms for course requests. For general information on filling in scan forms, see "Filling in Scan Forms" on page 5.

- Some course request scan forms have G and L next to the course number.

G means global alternate. If G is filled in, the course can be substituted for any course the student can't get into.

L means linked request. If L is filled in, the course can be substituted only if the student cannot get into the course to the left of the linked alternate course on the scan form.
- If the first course on the line on a scan form is a linked alternate, it is linked to the last course on the previous line.
- The first course on the scan form cannot be a linked alternate, because there is no previous course. If, in error, the first course is bubbled in as a linked alternate, Scanning treats the course as a first choice request.

Stage 3: Scanning Course Requests

After scanning the forms, use Scheduler to view the scanned attendance data.

To prepare to scan the forms:

- 1 Make a backup of your Win School data, or check that a current one exists. In case of problems, you can restore data from a backup.
- 2 Turn on the scanner and position the scan forms in the scanner. Insert the forms in the correct direction.

To scan course requests:

- 1 In the Main window, close any form files that are open, then click the Students icon.
- 2 From the Scan menu, choose Scanner Setup.
- 3 Select the scanner and scan form.

Check that baud rate, parity, stop and data bits, and port are the same as those selected for the scanner.

If settings do not match, either change the settings on the scanner, or change the settings in this dialog. Click OK.

- 4 From the Scan menu, choose Form Setup, select an option, then click OK.
- 5 From the Scan menu, choose Scan Printed Forms.

The Scanning Status icons indicate progress on scanning the form:

Left-hand icon	Scanning ready to begin
Second-from-left icon	Scanning reading the form file
Third-from-left icon	Scanning reading data stored in scanner
Right-hand icon	Scanning writing data to Win School database

Select Auto-Scan Forms to use a sheet feeder and scan all forms without stopping. Deselect to scan forms 1 at a time.

Select Stop on Scan Error to stop scanning when an error occurs.

- 6 Check the Setup Information.

If the type of scanner and scan form are incorrect, click Close and create a new form file with the correct scanner and form type. Then redistribute the scan forms.

If the communication settings do not match, click Edit Setup. From the popup menus, select the correct settings, then click OK.

- 7 Click Scan to begin form feed. If you are scanning forms 1 at a time, click Scan after inserting each form.

- 8 As scanning progresses, check the Scan Errors box for error messages. Click Stop to correct a problem and resume scanning, or find and re-scan the form if necessary.
To clear error messages, click Clear Errors.
- 9 To print error messages, click Close to close the Scan window, then choose Scanning Error Listing from the Reports menu. The report is displayed on your screen. Print the report and reopen the Scan dialog.
- 10 When scanning is complete, click Close.

To check the success of scanning:

- 1 To check for forms not scanned, generate a form status report. See “Generating Form Status Reports” on page 12.
- 2 In Scheduler, check that the scanned data displays correctly.
- 3 If scanning is not successful, use the error messages to correct the problem then re-scan the forms that have errors.

Scanning Alphanumeric Course Requests

You can scan alphanumeric course requests using the CSL-897 (Using COL) scan form. You should make a backup of your Win School data so that if there are problems, you can restore from a backup.

Scanning alphanumeric course requests includes the following stages:

- 1 Creating a form file.
- 2 Printing the Course Offerings List.
- 3 Distributing copies of the Course Offerings List and scan forms to teachers or students who mark them and return them to you.
- 4 Running the marked forms through the scanner, which saves it in the Win School database.

Stage 1: Creating a Form File

Using Scanners and Scan Form

You can connect the scanner to the COM1, COM2, COM3, or COM4 serial port.

You must use the SS CSL-897 scan form made by Scanning Systems, a division of Associated Business Products, Inc.

You can scan alphanumeric courses requests using the CSL-897 (Using COL) scan form with any of the following scanners:

- NCS Opscan 2

- NCS Opscan 3
- NCS Opscan 5
- Scanmark 2000 (no emulation)
- Scantron 8200 opt. 48
- Scantron 8400 opt. 48
- Sentry 3000 Optical Reader
- SR 360/601 (360 Mode)

To create a form file:

- 1 In the Scanning Main window, click Students.
- 2 From the Scan menu, choose Scanner Setup, and from the top 2 popup menus, select a scanner and scan form as listed in “Using Scanners and Scan Form.” Click OK.
- 3 From the Scan menu, choose Form Setup.
If you have scanned course requests before, select whether you want to append to the existing course requests or overwrite them. Click OK.
- 4 From the File menu, choose New. Type a name and description for the new form file. Click OK.

If the New command in the File menu is dimmed, check that the correct scan form is selected and that Unique and Alphanumeric is selected in Course Numbers in School Setup.

Stage 2: Printing the Course Offerings List

To print the course offerings list:

- 1 From the File menu, choose Print Course Offerings List.
You can print a selected grade or subject, and sort by bubble number, course number, or course title.
Click OK to preview the Course Offerings List.
- 2 To print the list, choose Print from the System menu.

Stage 3: Distributing Course Offerings List and Scan Forms to Teachers

Distribute copies of the Course Offerings List and scan forms to teachers or students to have them marked and returned. When the scan forms are marked, you can scan them into Win School.

Stage 4: Scanning Course Requests

When you have the marked scan forms, you can run them through the scanner, which saves it in the Win School database.

To scan student course requests:

- 1 Check that the scanner and scan form are set up according to “Using Scanners and Scan Form” and “To create a Form File:”, the scanner is turned on, and the scan forms are inserted in the proper direction.
- 2 From the Scan menu, choose Scan Printed Forms.
- 3 In the Scan Student Course Requests dialog, make selections in the Auto-Scanning Preference area, then click Scan to begin scanning.

Updating Course Offerings List

When there are changes to courses, you can update the Course Offerings List.

To update course offerings list:

- 1 From the File menu, choose Update Course Offerings List.
- 2 Select Append new courses to the existing list or Regenerate the list. Click OK.
- 3 If you select Regenerate the list, a warning dialog informs you that the Course Offerings List will be regenerated and the bubble numbers reassigned. Click OK to acknowledge the message.

Troubleshooting Scanning

Interpreting Error Messages

In the Scan Printed Forms dialog, the Scan Errors box displays error messages for scanning forms which have not been completed properly, and for errors in communication between the Scanning module and your scanner.

Use the Scan Errors box to find the forms containing errors if:

- you did not select the Stop on Scan Error option
- no Auto-Scanning preferences are selected and an error occurs while scanning

Click Clear Errors to delete the errors in this box.

If you want to print a copy of the errors listed in the Scan Errors box, choose Scanning Error Listing from the Reports menu.

Auto-Scan Forms Problems

When Auto-Scan Forms is selected in the Scan dialog, forms are scanned continuously until:

- stop on Scan Error is selected and an error occurs
- the Scan Errors list is full
- the end-of-batch form is scanned
- you click Close

Scanning Error Listing Report

This report lists all the scanning error messages that appear in the Scan Errors box in the Scan dialog.

The Scan Errors scrolling list is limited to 100 lines. When the list is full, you cannot scan. At that time, you should either find the forms that produced the errors and correct them, or print the errors and put the printed list with the scanned forms that produced the errors.

Then reopen the Scan dialog, click Clear Errors, and resume scanning.

To print the Scanning Error Listing report:

- 1 From the Reports menu, choose Scanning Error Listing.
- 2 To print the report, choose Print from the System menu.

Error Messages in Scanning

There are 2 kinds of errors in Scanning: communication errors and form errors. If Scanning cannot communicate with the scanner or make the scanner scan a form, Scanning stops and displays a communication error in the Scan dialog. If a particular form contains an error, a form error is reported in the Scan dialog and scanning continues unless “Stop on Scan Error” is selected.

If you do not see the error message you are looking for, contact Chancery Technical Support.

Communication Errors

When errors in communication occur, no forms can be scanned. Scanning automatically stops. Communication error messages are numbered in the 6000s.

Form Errors

Scanning also recognizes errors concerning how a form is bubbled. Form errors halt scanning only if you do not select Auto-Scan Forms, or if you select both Auto-Scan Forms and Stop on Scan Error. When Form errors occur, check the form to determine the problem. You can correct and re-scan it immediately, or set it aside to correct, and re-scan later.

If Auto-Scan Forms is selected, but Stop on Scan Error is not selected, you have to find the forms producing errors from the pile of scanned forms. When an error is encountered, the form is identified by its form number (if the number could be read) and its location in the pile of scanned forms.

Form error messages are numbered in the 7000s.

Scanning Error Messages

The messages are listed in numerical order.

Scanning Error 6000

Command error. Unknown command sent to the scanner.

Ensure you are using a scanner supported by Scanning. Also check that the communication settings are identical in these three areas:

- your scanner
- the windows operating system you are using
- the Scanning module

Scanning Error 6002

The Hopper Release Lever is not in the Feed position.

Put the Hopper Release lever in the Feed position and try again.

Scanning Error 6003

Jam error. The scanner has a paper jam.

Remove all forms from the scanner, smooth any creased forms and try again. If the error occurs again, one of your forms may be crumpled and cannot be scanned. Either enter the data manually or create a new scan form, fill it in, then re-scan the form.

Scanning Error 6004

Port is in use.

The communications port as selected in the Scanner Setup dialog is being used by another hardware device. In the Scanner Setup dialog, select a new port and try again.

Scanning Error 6006

There are no forms in Hopper to feed.

If you are auto-feeding scan forms, this error occurs when there is no end-of-batch form (a batch form with an ID of zero). Click OK.

OR

If there are forms in the Hopper, reposition them and try again.

See “Auto-Scan Forms Problems” on page 21.

Scanning Error 6007

Timing error. One or more timing marks were not read correctly.

The form was probably inserted upside-down or backwards. Try again with the form correctly oriented.

Scanning Error 6020

Form is not of the proper type.

The scan form selected in the Scanner Setup dialog is not the same as the scan form you are scanning. For example, an attendance form may have been placed in a pile of grade forms. Remove the form from the pile and continue scanning.

If you are using an Opscan 5 Model 30 scanner, set it to Sentry 3000 Emulation Mode and not Image Mode. In the Scanner Setup dialog in the Scanning module, you can select either NCS Opscan 5 or Sentry 3000 Optical Reader.

Scanning Error 6021

Cannot configure port with selected communications settings.

The scanner cannot communicate with Scanning. Ensure that your scanner configuration is correct. Confirm the communication settings in the Scanner Setup dialog match your scanner’s settings.

Scanning Error 7100

Timeout. No data was received from the scanner.

Some, but not all, of the data was received from the scanner. Confirm that the cable connecting the scanner to your computer is firmly attached. Ensure that your scanner configuration is correct. Verify that the default settings in the Scanner Setup dialog are accurately set.

If these settings were correct when the error occurred, you may have been too slow in feeding the form. Try again.

Scanning Error 7101

Timeout. No data was received from the scanner.

Usually, this error occurs because you didn’t feed the scanner a form in time. Try again.

If the problem persists, confirm that your scanner configuration is correct. Ensure that the settings in the Scanner Setup dialog are accurate. Verify that

the scanner cable is connected to the port selected in the Scanner Setup dialog. Make sure the cable has no bent or broken pins, then try again.

Scanning Error 7102

The end of batch character was received.

This means scanning stopped because you pressed the End-of-Batch button on the scanner.

Scanning Error 7104

The routine to process this form is not currently hooked up.

Make sure that a form name appears in the Setup Information box of the Scan Printed Forms dialog. Use the Scanner Setup dialog to select the correct scanner and form.

If the form name is the same as the form you are trying to scan, and you receive this message, call Chancery Technical Support.

Scanning Error 7105

Could not set up scanner.

Confirm that the correct scanner is selected in the Scanner Setup dialog. Make sure your scanner configuration is correct and the default settings in the Scanner Setup dialog are accurate.

Scanning Error 7106

Please re-scan form (Form Count #).

Re-scan the form.

The Form Count number indicates the position of the error producing form from the bottom of the pile.

Scanning Error 7502

The incorrect form was fed through the scanner (Count #).

First check that the form that produced the error is the kind that you want to scan. A teacher might have returned a grades form among the attendance forms, for example.

Next, confirm that the form file name on the scan form matches the Active Form in the Main window. You may have the wrong file open. If you are scanning requests, verify that the correct form is selected in the Scanner Setup dialog.

The Count number indicates the position of the error producing form from the bottom of the pile.

Scanning Error 7505

Form ID # does not belong to the currently opened Form File (Form Count #).

If the form belongs to the currently opened form file, confirm that the form ID number printed on the form is correctly bubbled in the form number bubbles or, on older forms, the course number bubbles. The marks filling in the form ID number may not be dark enough for the scanner to read. Fill them in completely and heavily.

The Form Count number indicates the position of the error producing form from the bottom of the pile.

Scanning Error 7507

An error occurred while saving changes to the form status flag (Count #, ID #).

The Status Information dialog is incorrectly stating that a form has not been scanned. You can re-scan the form to display the correct status. However, this is optional as the scan form has already been correctly scanned.

To access the Status Information dialog, from the Scan menu, choose Form Status.

Scanning Error 7508

The end of form character was received too soon.

First, confirm that the form which produced the error is the kind you want to scan.

Next, confirm that the form file name on the form matches the Active Form in the Main window. You may have the wrong file open. If you are scanning requests, check that the correct form is selected in the Scanner Setup dialog.

Scanning Error 7509

The end of batch form was fed.

This is not an error message; it means that scanning stopped because an attendance or grades form with an ID number of 0 was read. This is the end-of-batch form and should be the last form in a batch when Auto-Scan Forms is selected.

If the last form that was read is not your end-of-batch form, its form ID was incorrectly read as 0. Darken all bubbles of the form ID and try scanning the form again.

Scanning Error 7510

Too much data was transmitted from the scanner.

First, make sure the form that produced the error is the kind you want to scan. For example, a teacher might have returned a grades form among the attendance forms.

Next, check that the form file name on the form matches the Active Form in the Main window. You may have the wrong file open. If you are scanning requests, verify that the correct form is selected in the Scanner Setup dialog.

Scanning Error 7513

An error occurred while reading a student's letter grade (Count #, ID #).

A student's letter grade is rejected if:

- more than one letter is bubbled
- both + and - are bubbled
- a pass/fail mark and either + or - are bubbled

Erase the extra marks completely and re-scan the form.

The Count number indicates the position of the error-producing form from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7514

An error occurred while reading a student's Work Habit (Count #, ID #).

Ensure that no more than one bubble is marked in each student's Work Habit field. Erase all extra marks completely.

The Count number indicates the number of forms from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7516

An invalid Course Number has been bubbled (Count #, ID #), or the number bubbled is not assigned to any course.

In any row or column that contains a number from 0 to 9, only one bubble should be filled in. Make the necessary corrections, erasing old marks completely, then re-scan the forms.

The Count number indicates the number of forms from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7517

An invalid Student Number has been bubbled (Count #, ID #), or the number bubbled is not assigned to any student.

In any row or column that contains a number 0 to 9, only one bubble should be filled in. Make the necessary corrections, erasing old marks completely, then re-scan the forms.

The Count number indicates the position of the error producing form from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7519

Both alternate (G, L) marks have been bubbled for a course (Count #, ID #).

Find any course that has both the G and L bubbles filled in. Erase one of them completely, then re-scan the form.

The Count number indicates the number of forms from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7520

Invalid Form Number.

A form number has been incorrectly bubbled or has been scanned for the wrong form file. Remember that any form number is incorrect for student course requests. Make the necessary corrections, erasing the old marks completely, then re-scan the form or place the form in the correct form file.

Scanning Error 7521

Both pass grade and letter grade have been filled (Count #, ID #).

Find any course that has both the pass grade and letter grade filled in. Erase one of them completely, then re-scan the form.

The Count number indicates the position of the error producing form from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7522

An error occurred while reading a student's percent grade (Count #, ID #).

Confirm that all students' percent grades are bubbled in completely. Erase any extra marks and re-scan the form.

The Count number indicates the position of the error producing form from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7523

An error occurred while reading a student's Citizenship (Count #, ID #).

Confirm that no more than one bubble is marked in each student's Citizenship field. Erase all extra marks completely.

The Count number indicates the position of the error producing form from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7524

An error occurred while reading a student's Pass Grade (Count #, ID #).

Confirm that no more than one bubble is marked in each student's Pass Grade field. Completely erase any extra marks.

The Count number indicates the position of the error producing form from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7525

Cannot process day # of Week # (Count #, ID #).

The day you are scanning attendance for has no attendance value, most likely because it is a holiday. Click Edit Days in the Scan Printed Forms dialog, deselect the day, and re-scan the form.

The Count number indicates the position of the error producing form from the bottom of the pile; the ID number is the form ID number.

Scanning Error 7530

Link Course requires a Main Course (Form Count #, ID #).

Look for courses with the L bubbled. The course before it must have neither the G or L bubbled. Erase the incorrect marks completely and re-scan the form.

The Form Count number indicates the position of the error producing form from the bottom of the pile; the ID number is the student's ID number.

Scanning Error 7531

No courses filled for the student (Form Count #, ID #).

The student did not bubble the Course Request form, or did not fill in the bubbles darkly enough. Fill in light bubbles heavily and completely.

The Form Count number indicates the position of the error producing form from the bottom of the pile; the ID number is the student ID number.

Scanning Error 7533

Invalid Attendance Code

Find any student who has more than one code bubbled in on an F-7411-CSL-L attendance form. Erase all extra marks completely, then re-scan the form.

Scanning Error 9999

9999 Unhandled Scanning Error

This error message may also be accompanied by a number in brackets. This number further defines where the error occurred in the Scanning module.

Write down the entire error message on your screen and call Chancery Technical Support.

Fixing General Problems

Finding scan sheets that need reprinting after making roster changes

From the Scan menu, choose Verify Scan Forms.

Form IDs do not line up when printing scan forms on a laser printer

Try adjusting the Reduce/Enlarge option in Page Setup from the System menu. Some laser printers and printer drivers use different margin settings and need adjustment when printing scan forms.

Message “Course Requests will not be available. Student or Course numbers are not numeric or Course numbers are not unique”

Scanning course requests requires numeric student and course numbers in School Setup.

Printing scan forms on a laser printer

Use a laser printer only for cut-sheet, not continuous-feed, forms.

Student icon dimmed in Main window

Scanning course requests requires numeric student and course numbers in School Setup.

Using Scanmark 2500 scanner with Win School

Scantron has replaced its 8000 series scanners with the 2500 series. Select the Scantron 8200 or 8400 scanner in Scanner Setup when using the Scanmark 2500 series scanners.

Using ASCII Transfer

Overview

ASCII is a code for representing English characters as numbers, with each letter assigned a number from 0 to 127. ASCII codes are used to represent text, making it possible to transfer data from one computer to another. It is an acronym for American Standard Code for Information Exchange.

Use the ASCII Transfer module to import and export data. Some Win School data can only be transferred with the ASCII Transfer module.

Common times to transfer data are:

- when installing Win School for the first time

You can import data from another program, such as a spreadsheet application.

- when students transfer between schools

You can export or import student information.

If other modules are running, you can start ASCII Transfer, but you cannot import data.

Deciding on Data-Transfer Methods

The table lists data transfer methods between Win School and other programs. The modules used most frequently are ASCII Transfer, Scanning, and Scheduler.

To transfer data with modules other than ASCII Transfer, please read the sections in the guide for the particular module.

Module and Section in Guide	Transferable Data	Format
ASCII Transfer System Administrator Guide, ASCII Transfer section	Import and export student, teacher, room, and course data. Export student timetables.	Format defined by a template you create. Provides many formats and fewer fields than Scheduler or Report Manager.
Scanning System Administrator Guide, Scanning Data section	Import course requests, daily and class attendance, marks.	Format pre-defined by Win School.
Scheduler Data Transfer section	Import and export class and student timetables. For an entire school, include all classes or all students.	Format pre-defined by Win School. Comma-delimited format that cannot be changed.

Module and Section in Guide	Transferable Data	Format
Universal Access, and District Extract	Export student, teacher, school, marks, attendance, and course data.	dBase Format (DBF).
Various modules and Report Manager Reports section	Export data in built-in reports. Export data in custom reports. Templates created in Report Manager.	Format pre-defined by Win School. Gives more fields than Scheduler or ASCII Transfer.

Defining File Structure

All Win School data is stored in Win School files readable by Win School only. To transfer data into or out of Win School as readable text, 3 steps are required:

- 1 Create a template to export or import data.
- 2 Generate a transfer file containing a copy of your data, in text format.
- 3 Perform the data transfer.

To transfer data, be sure both Win School and the other program are translating the information in the data file in the same way.

Data File Structure in Win School

Record A data file consists of a series of records. Each record contains data about 1 item, such as 1 student.

Field Each record consists of a series of fields. Each field contains specific data about 1 item, such as birthdate. Each field in a transfer file must have a corresponding field in your Win School database.

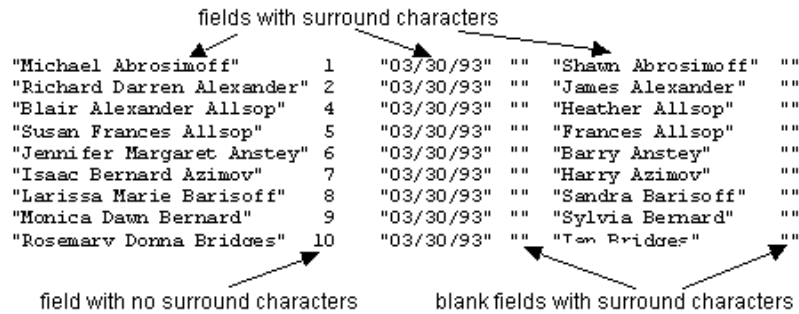
Fields appear in a sequence which is repeated for each record. Win School and the other program must agree on what fields are in each record and where each field and record ends. There are 2 ways of defining this information:

- Using fields and records with delimiters and surround characters.
- Using fields with fixed lengths.

Delimiters These define the beginning and end of a field and a record. Delimiters can be commas, tabs, or paragraph marks. Record delimiters mark the end of records, and field delimiters mark the end of fields.

Surround Characters These can be quotation marks. They are placed around fields to distinguish between characters used as delimiters and text characters.

Commas may be your field delimiters, but some addresses contain commas, such as 313 North Street, Apt. 123. By enclosing the address field in surround characters, "313 North Street, Apt. 123," Win School transfers all of that text into 1 field, instead of placing 313 North Street in 1 field and Apt 123 in the next field.



Fixed Length This is a defined number of characters for each field and record. For example, you can define the first 6 characters to be the student number and the next 20 characters to be the student name.

Templates These define data type, fields, field order, and method of defining field and record lengths. You must define the file structure with templates in ASCII Transfer.

Data File Structure in Other Programs

Mainframe computer programs usually recognize quotation marks as surround characters, commas as field delimiters, and return characters as record delimiters. A pair of empty quotation marks indicate an empty field.

Many spreadsheet and database programs do not use surround characters. They delimit fields with tab characters and records with return characters.

Saving Templates to Diskette

Copy a template to a diskette to give to other schools, or to copy to your Win School database. You can include the template with the transfer file.

To copy a template to a diskette:

- 1 In the Main window, highlight the template you want to copy.
- 2 From the File menu, choose Save Template to Disk.
- 3 Type a name for the template. For easy identification, use the .CAT file extension to indicate a catalog file. Click OK.

To copy a template from diskette to Win School:

- 1 In the Main window, choose Load Template from Disk from the File menu.
- 2 Locate and highlight the template, then click OK.
- 3 In the dialog that appears, name the template and click OK. You can keep the same name or give it a new one, but keep the .CAT extension.

A copy of the template is saved to your Win School database and its name appears in the Main window.

Creating Templates

You must use templates to import and export data. Templates define the data fields to transfer, their order, and where fields and records begin and end.

Win School data transfer templates have the .CAT extension. Report Manager templates have the .RMN extension.

Using the ASCII Transfer Windows

To open a template in the Main window, double-click it. The Edit Template and Data List windows open.

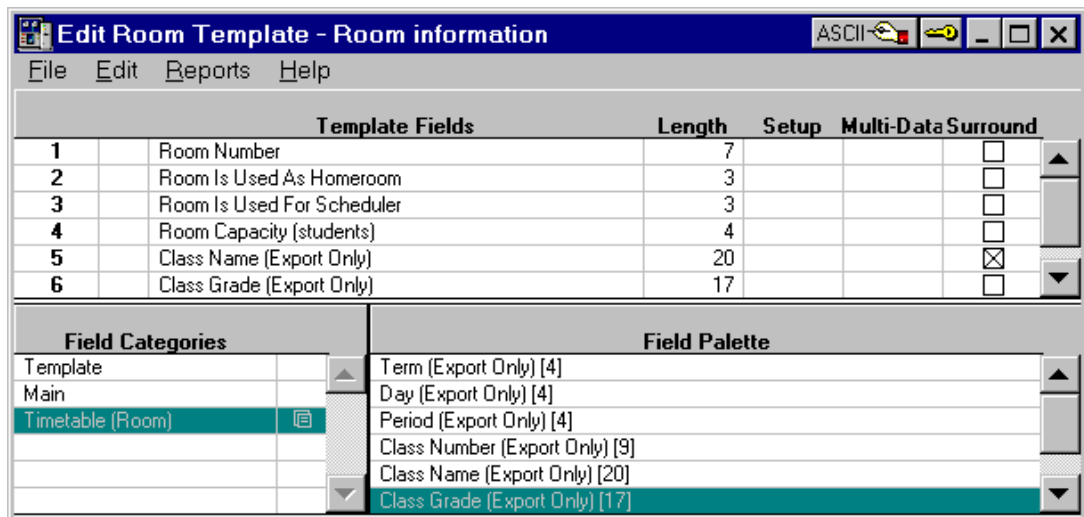
Main Window

When either the Data List or the Edit Template window is opened, the Main window closes.

To open the Main window, close the Data List window.

Edit Template Window

The Edit Template window is where you edit, add, and delete fields to a new or an existing template.



Template Fields

Lists the order of the fields on the template. The order is important. It must match the order of the fields in the transfer file.

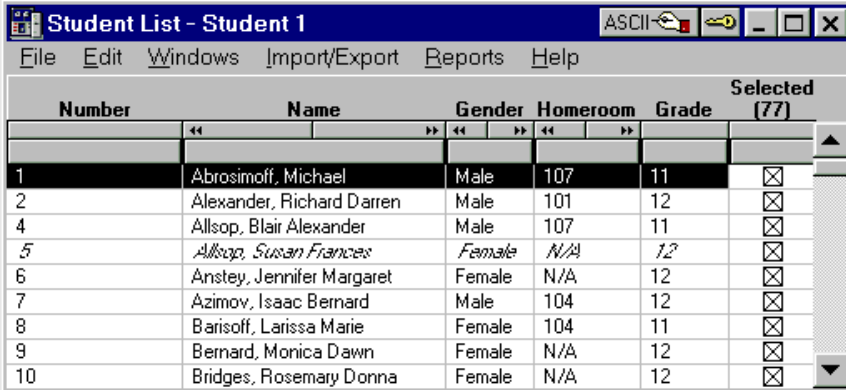
Field Categories

When you highlight a category, its fields are displayed in the Field Palette list. The Main category lists all available fields. The Template category lists special file structure fields.

Field Palette Lists the fields you can add to the template. The list changes depending on the category in the Field Categories list.

Data List Window

Export and import data from the Data List window.



Number	Name	Gender	Homeroom	Grade	Selected (77)
1	Abrosimoff, Michael	Male	107	11	<input checked="" type="checkbox"/>
2	Alexander, Richard Darren	Male	101	12	<input checked="" type="checkbox"/>
4	Allsop, Blair Alexander	Male	107	11	<input checked="" type="checkbox"/>
5	Allsop, Susan Frances	Female	N/A	12	<input checked="" type="checkbox"/>
6	Anstey, Jennifer Margaret	Female	N/A	12	<input checked="" type="checkbox"/>
7	Azimov, Isaac Bernard	Male	104	12	<input checked="" type="checkbox"/>
8	Barisoff, Larissa Marie	Female	104	11	<input checked="" type="checkbox"/>
9	Bernard, Monica Dawn	Female	N/A	12	<input checked="" type="checkbox"/>
10	Bridges, Rosemary Donna	Female	N/A	12	<input checked="" type="checkbox"/>

The Data List window displays lists of 1 type of data, depending on your template type. From these lists, select items to transfer when exporting or importing.

You can sort students, courses, teachers, or resources data lists. Rooms, home languages, conditions, or condition types are listed alphabetically.

Preparing to Create a Template

Find the file structure for the program to which, or from which you are transferring data. For importing, you can open the transfer file in a word processing program and look at the data to confirm this information.

You need to know the following:

- data fields and their order
- delimiters or fixed record lengths used
- format of dates and student names
- number of requests transferred when transferring student requests, if the number varies, and if course names or numbers are used

Minimum Template Requirements

Order and number of fields must be identical for the Win School data template and the sending or receiving program.

Student, Teacher, Course, and Room templates must include the record number. For example, a Student template requires student numbers, a Room template, room numbers.

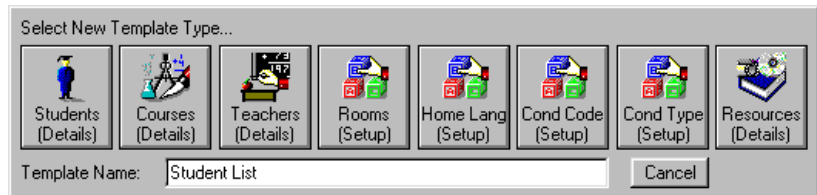
Include a minimum of both student name and student number in the template when importing a new student record.

Creating a Template

Use the following procedure for creating a template. For more information on fields, and the order in which to add them, see “Designing Report Manager Templates” in the System Administrator Guide.

To create a template:

- 1 From the File menu in the Main window, select New Template.
- 2 Type the name of the new template in the Template Name field.
- 3 Select the type of template.



To	Select
Import or export Details student information	Students (Details)
Import or export Scheduler student requests	
Export student timetables	
Import or export Historical Marks	
Export Scheduler course requests	
Import or export course information	Courses (Details)
Import or export teacher information	Teachers (Details)
Import or export room information	Rooms (Setup)
Import home language lists	Home Lang (Setup)
Import condition codes	Cond Code (Setup)
Import condition types	Cond Type (Setup)
Import or export course resources	Resources (Details)

- 4 In the Edit Template window, choose Format Setup from the Edit menu.
- 5 In the Format Setup dialog, define formats and delimiters for the template, then click OK.

For more information, see “Designing Report Manager Templates” in the System Administrator Guide.

- 6 Add fields to your template in the order you want Win School to transfer data. See the following field descriptions for more information.

For information on inserting repeating groups, see “Using Repeating Groups” on page 41.

- 7 Check that your template is correct, then save it.

New Students

A template to import new students must include both the Student Name and Student Number fields.

Address Fields for Students

A message appears if your template includes an address field that does not appear in Details. You can proceed to transfer this data anyway, or you can click Cancel to close the dialog without transferring data. Then delete the address fields on your template.

The following address fields do not appear as separate fields in Win School. You can import, but not export, them. During import, Win School appends these fields to the appropriate Street Address field.

- Contact’s Apartment Number #
- Contact’s House Number
- Contact’s Street
- Student’s Address Apartment Number # Use when your Student Address Format has 2 address lines in School Setup.

The order of the fields in the template determines the order in which the data is transferred. For example, if the apartment-number field appears in the template before the street address field, the apartment number will appear at the beginning of the street address in Student Details.

When separate apartment numbers are imported, Win School separates the numbers from the rest of the street address by a comma and a space.

If the prefixes Apt. or # are not included in the transfer file, add them in Details after the import. If a template containing these fields is used for export, an empty field appears in the transfer file where that field appeared in the template.

Contact Fields

You can change the name of a contact field from one contact to another. For example, Contact 1 can be changed to Emergency Contact 2.

To change a Contact field:

- 1 In the Template Fields column, double-click the existing Contact Name.
- 2 From the popup menu in the Select Contact dialog, select a contact, then click OK.

Course Request Fields

Import either the “Course Request (Name)” or “Course Request (Number)” field, not both. If you import both, each course request is imported twice. If importing both fields is unavoidable, in Scheduler, delete duplicate requests with “Remove Duplicate Requests.”

You can export both “Course Request Name” and “Course Request Number” fields.

The name and number fields transfer first-choice course requests. To import alternate requests, add the “Course Request Kind” field right after the name or number fields.

Use Course Request Kind to transfer alternate course requests. It must follow the Course Request field.

If the imported data begins with L, the preceding course request becomes a linked alternate. The linked alternate must follow the first-choice request with which it is linked. If the imported data begins with G, the preceding course request becomes a global alternate. If the imported data begins with any other character or is empty, the preceding course request becomes a first-choice request.

Course Request Linked Alternate fields contain an alternate request linked to the preceding course request. A Course Request field must precede a Course Request Linked Alternate field.

Course Request Global Alternate fields are for global alternate requests.

Dummy Field

In the Template field category, this is the first field in the Field Palette column.

When exporting data, place dummy fields in the position where the program receiving your data requires data fields that Win School does not have or that you want to leave empty.

When importing data, insert dummy fields in the position where the import file has a data field that you don’t want in Win School.

Gender Field

When exporting data, Win School transfers student and teacher gender fields as Male and Female. When importing, Win School transfers any data in this field beginning with f or m as Female or Male.

Fixed Length Fields

When importing a fixed length file that includes record delimiters, end the template with a Dummy field the same length as the record delimiter, usually 1 or 2 characters. Otherwise, the number of characters in the template will not match the number of characters in each record of the transfer file.

Fixed length fields are left justified. If the data in a fixed length field uses fewer characters than the number assigned to that field, insert spaces as fill characters. If a field length is 10 characters, for example, and the data is only 8 characters, add 2 spaces to the end of the data.

Historical Data

When transferring data, include Historical data in a repeating group. From the Edit menu, select Define Repeating Group. Put Year and Class fields in repeating groups. If you don't do this, the data won't transfer.

For example, set up fields on a template, in order:

- Student Number
- Repeating Group * times
- Year
- School Name
- Student Grade

When you export historical data for the 1998/99 school year, 1998 appears in the Year field.

When you import historical data, the Year field for the 1998/99 school year should be 1998, not 1999.

In Terms Field

The "In Terms" field in a student historical record is represented by a Y or N. The field is position sensitive, to represent the 12 terms. If the class is taught in Term 2, the data element in the ASCII file is:
NYNNNNNNNNNN.

Name Field

Win School can transfer student or teacher name fields as 1 field or as separate fields.

Use the fields Student's Name or Teacher's Name, to transfer the first, middle, and last names in 1 field. Use the fields Name (First), Name (Middle), and Name (Surname), to transfer names in separate fields.

The Student's Name and Teacher's Name fields operate as follows:

- When exporting the Student's Name or Teacher's Name in 1 field, Win School transfers the first, middle, and surnames in the order

specified in the Format Setup dialog, in the Edit menu. If the surname is first, a comma is inserted after the surname before the first and/or middle names.

- When importing the Student's Name or Teacher's Name in 1 field, Win School transfers the first word as the first name, the second as the middle name, and all other words as the last name. If a name element is missing, Win School leaves the middle name blank.

After importing, check student names in Details for accuracy. When importing, commas in the name are removed.

School Setup Lists for Popup Menus

Data for School Setup is transferred as a pair: Short Code and Description. Templates transferring School Setup lists must include the pair.

If imported Short Codes match Win School codes, but imported Descriptions don't match, Win School uses existing Descriptions, not the imported ones.

If Short Codes don't match but Descriptions do, Win School applies existing Short Codes to the imported Descriptions.

If neither Short Codes nor Descriptions match, and you select the checkbox in the Setup column in the Edit Template window, Win School adds the imported Short Codes with Descriptions to School Setup. The new Short Code is either the imported code if it is 4 characters or less, or a greater-than symbol followed by 3 digits, for example >005. You can change this Short Code in School Setup.

Status Codes

Imported Status Codes must include a date: Student's Status Code and Student's Status Code Date.

When importing student records which have new status codes, either:

- Before importing, in School Setup, enter new status codes.
OR
- After importing, change the status-code type in School Setup. Win School adds all new status codes in School Setup as Entry type. Student status codes are automatically updated in Student Details.

Timetable Fields and Repeating Groups

The number of loops in the repeating group of exported Student Timetables must be: blocks-in-a-cycle times terms-in-the-year. In Scheduler, this number appears in the heading of the Student Usage list in the Performance Report.

To export Timetable fields, include at least 1 of the following fields in the repeating group:

- Class Number (export only)
- Class Name (export only)
- Class Grade (export only)
- Class Section (export only)
- Course Alternate Name (export only)

User-Defined Fields and Flags, and Custom Tabs fields

User-defined fields and flags are identified only by number in the Field Palette column. Check School Setup to select the correct fields for a template.

User-defined flags have Yes and No values. Win School interprets imported y or n, upper or lower case, as Yes or No.

Custom Tabs fields defined as Boolean accept Yes or No, and are not case-sensitive. Blank fields are imported as N/A.

User-Defined (Export Only) Fields

These fields allow insertion of any ASCII character in the exporting transfer file. Use this field anywhere as often as you like in your template to export characters you specify.

To select a character for the User-Defined (Export Only) field:

- 1 In the Edit Template window, highlight Template in the Field Categories column, then double-click the “User-Defined (Export Only)” field in the Field Palette column to copy it to the Template Fields column.
- 2 Double-click “User-Defined (Export Only)” in the Template Fields column, then select the character you want added to the template.

For ASCII, type the character’s ASCII number between 0 and 255.

Using Format Setup Options

Use the Format Setup dialog to select field delimiters and format options for exporting or importing data.

From the Edit menu in the Edit Template window, Select Format Setup.

Record Delimiter, Field Delimiter, and Surround Character

You only need to select these options if you are not using fixed length records. If you are using fixed length records, see “Use Fixed Record Lengths” on page 41.

The record delimiter, field delimiter, and surround characters must be different from one another. The surround character must also be different from any other character you select in this dialog.

LF	line feed
CR	carriage return
ASCII	the ASCII value of the character you want. ASCII values above 128 are not standard.

Date Delimiter

The character that separates day, month, and year. None means each element of the date must be represented by 2 digits, for a total of 6 digits. For example, 010699 is January 6, 1999.

Date Format

Choose the order of the day, month, and year for dates. The year can use 2 or 4 digits. The month can use 2 digits or 3 characters.

Name Format

Choose the name order for transferring the Student Name and Teacher Name fields.

Use Intelligent Surround


For exporting data only and only for fields where the checkbox in the Surround column in the Edit Template window is not checked. Ignored when importing data.

When “Use Intelligent Surround” is selected, each field in each record is checked to see if it contains a field or record delimiter character. If a field does, ASCII Transfer places surround characters around that field, so that the delimiter characters within the field are not interpreted as file delimiters.

Use Fixed Record Lengths

If you use fixed record lengths instead of delimiters, Win School disregards all format options except date format. Win School treats all characters in a field as text. The numbers in the Length column in the Edit Template window determine where fields and records begin and end.

Using Repeating Groups

The Field Categories  icon in the Edit Template window identifies fields that are often included in repeating groups. Use repeating groups to transfer data in fields that contain more than 1 value. A student usually requests more than 1 course, for example, so the Course Request field is usually set up in a repeating group.

Course requests, status codes, conduct fields, and student timetable blocks are fields commonly used in repeating groups. Historical information fields must be included in repeating groups to transfer successfully.

Templates can contain more than 1 repeating group.

Using Loops in Repeating Groups

Loops are the number of times Win School transfers data for a field. When you create a repeating group, you define the number of loops, which is the maximum number of values a field can contain.

If students can have up to 3 status codes for the status field, for example, set 3 loops. Students with fewer than 3 codes will have empty status code fields.

To be sure there are enough loops, set the number slightly higher than you need.

Creating and Editing Repeating Groups

Define the number of loops, then define the fields to be included in the repeating group. The order of the fields is important. Win School transfers data in the order the fields appear in this list.

To create a repeating group:

- 1 Open the template in which you want to create a repeating group.
- 2 In the Template Fields column, highlight the field above which you want to insert the repeating group.
- 3 From the Edit menu, choose Define Repeating Group.
- 4 Type a number in the Number of loops field, then click OK.

Make the number of loops equal to or more than the maximum number of values stored by any field in the group. Two entries appear in the Template Fields column.

<input type="radio"/>	Repeating Group 20 times.
<input type="radio"/>	End Group

- 5 Highlight End Group, then, in the Field Palette column, double-click the field you want included in the repeating group. The field is inserted above End Group in the Template Fields column.
- 6 Repeat Step 5 for each field you want to include.
- 7 Save the template.

To change the number of loops:

- In the Template Fields column, double-click Repeating Groups * times for the group you want to change the number for.

To delete a repeating group:

- In the Template Fields column, highlight the Repeating Groups * times field you want to delete and press Delete, then click Yes to delete it.

Editing a Template

To add fields to a template:

- 1 In the Main window, double-click the template you want to edit.
- 2 In the Field Categories column, highlight the category that contains the field you want to add.
- 3 In the Field Palette column, double-click a field to add it above the highlighted field in the Template Fields column.
- 4 If you are not using fixed length fields, go to the next step. If you are using fixed length fields, type the length of each field in the Length column.

If the fixed length field is smaller than the default value, imported data is not affected, exported data might be truncated.

If the fixed length field is larger than the default value, imported data might be truncated, exported data is not affected.

- 5 If you are not importing School Setup lists, go to the next step. If you are importing School Setup lists that correspond to popup menus in Details, a checkbox appears in the Setup column. When exporting data, these checkboxes are ignored.

Specify what happens to data that doesn't match an existing item in a popup menu.

- To add a field to the popup menu, select the Setup checkbox. The > symbol will appear in School Setup and Details popup menus. In School Setup, you can delete the symbol.
 - To not import a field, deselect the Setup checkbox. N/A will appear in the student, teacher, and course popup menus.
- 6 If you are not exporting data, go to the next step. If you are exporting data, select the Surround checkbox to place surround characters around that field. When importing data, this checkbox is ignored.
 - 7 Save your template.

To delete and rename templates:

- To delete a template, in the Main window, highlight the template you want to delete and select Delete Template from the File menu. Click Yes.
- To rename a template, highlight the name, choose Rename Template from the File menu, and type the new name. Click OK.

Exporting Data

Before exporting data, check that your template is up-to-date. Exporting data copies selected data in the format specified by the template from Win School to a transfer file.

To export data:

- 1 In the Main window, double-click the export template.
- 2 In the Data List window, select the items to export.
- 3 From the Import/Export menu, select Export.
- 4 Type the name of the transfer file. Locate and highlight the folder that the transfer file is to be saved to, and click OK.
- 5 Print the Export Report, then close the Report window.
- 6 Check that the export is complete and without errors.
 - Review the Export Report. If there are errors, correct them in the originating file and repeat the export.
 - If the export is successful, load the data from the transfer file to the program importing it, then check for errors.

Importing Data

Importing data is a 4-stage process:

- preparing to Import Data
- making a Trial Import
- importing Data
- checking and correcting Imported Data

Preparing to Import Data

Always back up your data before importing. If the data is imported incorrectly, you have the option of restoring from a backup.

When you import Grade Points with blank Potential Credits, the default Potential Credit is 1 after the import. This provides correct GPA calculations.

To prepare to import data:

- 1 Back up your Win School data.
- 2 Check that the importing template is up-to-date.
- 3 Check that all popup menus are complete in School Setup.

- 4 In the program from which you want to transfer data, copy the data in text (ASCII) format to a transfer file. The documentation for that program should describe the procedure.
- 5 Put the transfer file on a computer or server accessible from the computer running Win School.
- 6 If you are importing data from another school, do a trial import with a few students so you can check that the data imports correctly. See “Making a Trial Import” on page 45.

Before Importing User-Defined Fields

Before using ASCII Transfer to import User Defined data, make sure the receiving fields have the correct field type in School Setup.

User Defined fields can have 1 of 4 Types: Text, Numeric, Date, or Phone. Extended Demographics fields can have a Boolean type in addition to the above 4 types. Boolean fields have Yes, No, or N/A values. Blank fields are imported as N/A.

If you try to import alphanumeric data into a User Defined field defined as Numeric, that field won't accept the data and it is not updated.

If you want to change an incorrect User Defined field type after data has been entered, use ASCII Transfer to export the data, correct the field type, then re-import the data.

For example, if the User Defined field was set to Numeric, you cannot enter alphanumeric data. Use ASCII Transfer to export this data, change the field type to Text, and use ASCII Transfer to import the data back. The data is now seen as text, allowing letters and numbers in the field.

Making a Trial Import

The trial import generates a report, but does not import data. It neither affects Win School data nor the data in the transfer file.

Do a trial import to ensure that the transfer file structure matches the import template structure. Check that fields are in the correct order and contain the correct data.

Trial Import Report

The trial import creates a report on the template format, the fields in the template, and data from the transfer file.

To do a trial import:

- 1 Open the Data List window of the template you are using to import data.
- 2 From the Import/Export menu, select Import Trial, highlight the transfer file, then click OK.

- 3 Enter the number of records to import. A minimum of 2 are required to verify the end of 1 record and the start of the next.
- 4 The first page of the Trial Import report shows the format of the template. To view the template fields and imported data, display the remaining pages.
- 5 Print the Import Trial report and check for inconsistencies between the transfer file and the template. Look for a 1-to-1 correlation between data fields in the transfer file and data fields in the template. See “Checking and Correcting Imported Data” on page 48.
- 6 Correct problems by making changes to either the template or the transfer file.

If there are just a few errors, edit with a word processor. Use the Save As command to save in Text Only format.

For many errors, correct in the program that exported the file, then create a new transfer file.
- 7 Repeat the trial import until you are satisfied.

Checklist for Trial Import

Check that delimiter and format preferences are correct. These preferences are defined in the Format Setup dialog and displayed on the first page of the Trial Import report.

- Check that delimiters are correct. If all imported data appears in 1 field, field delimiters are incorrect.
- Check dates format.
- Check names format.
- Check that course requests are either names or numbers, not both.
- Check that data is imported into the correct fields, in the correct order, using the correct number of fields. Check several records.
- Check that data displayed on each line corresponds to the correct field name.

If data appears in the wrong field, see if the problem is with the template or with the transfer file.

- Check the values for Yes/No flags.
- Check that all data fields appear for all students.

If a student’s fields are blank or the record stops, find out why. The student might not have any data for those fields. Or a record delimiter might be in the wrong place, causing the student record to end before all data is entered. Check that surround characters are correctly placed.

For other ideas, see “Troubleshooting ASCII Transfer” on page 49.

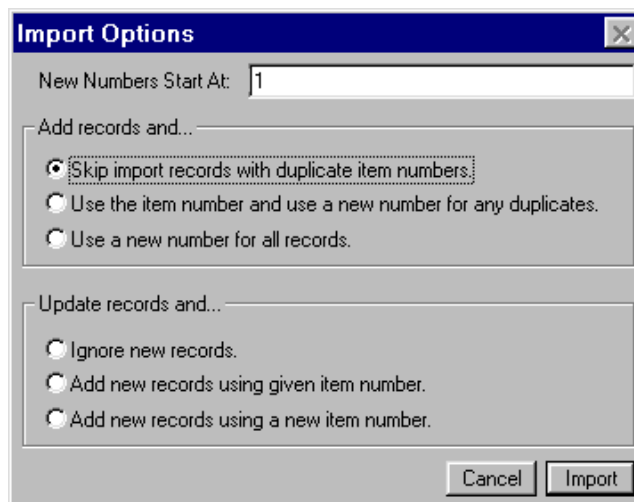
Importing Data

Import data only after you have made a backup of your Win School data and have corrected any errors in your trial import.

Imported data is copied in the format specified by the import template from the transfer file to the Win School database.

To import data:

- 1 In Windows, back up the Win School data folder.
- 2 In ASCII Transfer, open the Data List window of the import template, and from the Import/Export menu, select Import.
For data that is not students, teachers, courses, or rooms, go to Step 5.
- 3 For students, teachers, courses, or rooms, the Import Options dialog appears.



Sometimes the only active option is “Ignore new records.” The most common reason for this is that you are importing data without student names.

- 4 Indicate how to deal with records that have ID numbers the same as and different from those in the Win School database.

New Numbers Start At	Records assigned a new number get the next free number starting with the number you type in this field.
Add records and... “Skip import records with duplicate item numbers.”	Matching numbers are not imported. Non-matching numbers are imported with their existing numbers.

Add records and... “Use the item number and use a new number for any duplicates.”	Matching numbers are imported and assigned the next free number. Non-matching numbers are imported with their existing numbers.
Add records and... “Use a new number for all records.”	Matching and non-matching numbers are imported and assigned the next free number.
Update records and... “Ignore new records.”	Matching numbers are imported and imported data replaces existing Win School data. Non-matching numbers are ignored.
Update records and... “Add new records using given item number.”	Matching numbers are imported and imported data replaces existing Win School data. Non-matching numbers are imported with their existing numbers.
Update records and... “Add new records using a new item number.”	Matching numbers are imported and imported data replaces existing Win School data. Non-matching numbers are imported and assigned the next free number.

- 5 Click Import, then highlight the transfer file and click OK.
- 6 Print the Import Report and close the report window.
- 7 Check that the import is complete with no errors:
 - Review the Import Report.
 - If an import is complete, new records appear in the Data List window.
 - Start School Setup or Details and examine the new records for incomplete or missing data.

Checking and Correcting Imported Data

To check for and correct errors in the imported data:

- If the problem is minor, correct the data in Details. For example, student names usually contain a few errors.
- If the problem is serious, restore the backup data and check the originating file and the template for inconsistencies.

To remove imported data:

- 1 Make a note of some of the incorrect records and exactly what happened with them.
- 2 If you added items without updating records, delete those items from Details or School Setup.

If you updated records and they have been damaged, restore the backup data.
- 3 Perform a trial import and look for one of the damaged records you noted. Compare the original import with the trial import to find the source of the problem.

For solutions to specific problems, see “Troubleshooting ASCII Transfer” on page 49.

Troubleshooting ASCII Transfer

Changing Case of Student Names

Use ASCII Transfer to export Student Number and Student Name into a text file. Open the exported text file in a spreadsheet program or a word processing program. Convert the Student Name column to the case you want, initial capitals, all uppercase, or all lowercase. Import the corrected text file back into Win School.

Entries with the Same Number when Teachers, Students, or Classes are Imported

At some point, records in the database that had the same ID number, were deleted. Before you can reuse these numbers, Win School needs to run Deletions Maintenance. Deletions Maintenance is run automatically when you exit Win School Single-User.

In Win School Multi-User, you can force Deletions Maintenance by shutting down and reloading the Win School Server. If you are unable to shut down, wait for nightly maintenance. After nightly maintenance, you will be able to import records with those ID numbers again.

“Ignore new records” is the only Option when Importing Student Records

Your template is missing either Student Name or Student Number. To import a new student record to Details, you must have both the Student Name and Student Number fields on the template.

Imported Data in the Wrong Field

Check to see if this problem affects 1 or all records.

If the problem affects all records, change either the template or the text file so they match.

If the problem affects 1 or a few records, change the records. In the table below, for example, the data is offset by 1 field from the City field down. The letter B should be in the same field as the number 456.

Student's Physical Address 1	123 Main Street
Student's Physical Address Apt. # (Import Only)	456
Student's Physical Address City	B
Student's Physical Address State	Los Angeles
Student's Physical Address Zip Code	CA

To change the records so both names appear in the same field:

- 1 Check the ASCII Transfer file to see if the data for the affected field contains an extra delimiter or an extra empty data field.
- 2 Delete the extra delimiter or the extra data field in the ASCII Transfer file so the 2 names appear in the same field.

Imported or Exported Data is Truncated

If imported or exported data is truncated a field length definition in the template is incorrect.

- 1 Open the Edit Template window of the template.
- 2 Increase the field length definition for this field.
- 3 Run the trial import or export again.

Importing Student Grades doesn't work with Student ID and Student Name

The template won't work if you include both Student ID and Student Name. Use one or the other.

Message "key value not present" on Importing Records

You get this message if your date format in the text file doesn't match the date format defined in the template. Change the date format in either the template or the ASCII file so that two date formats match.

Minimum Access Levels to Export Student Name and Phone Number

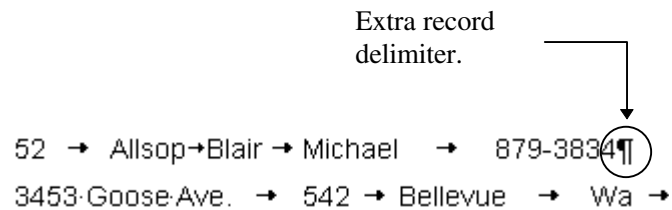
Access levels are in School Setup under Passwords. Choose System Passwords and set the Details - Student access level to Change Only and the Details - Personal Tab access level to Edit.

Record incomplete, half treated as the beginning of the next record

Look at the ASCII file with word processing program to diagnose the problem.

In this example, ASCII Transfer found an additional character that it interpreted as a record delimiter, in the Street Address field between 899-3834 and 3453 Goose Ave.

Extra record
delimiter.



```
52 -> Allsop->Blair -> Michael -> 879-3834
3453 Goose Ave. -> 542 -> Bellevue -> Wa ->
```

To correct the problem, delete the extra record delimiter, save the file, then run the trial import again.

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