

# Y12 References

**Pro Version 1.01**

Copyright © Ian Lee, 2004-2009, all rights reserved

## INTRODUCTION

This application requires ® Microsoft Office 97 or above installed on your computer and a screen resolution of at least 800x600. When you open the workbook it will run full screen so there are no Excel menu bars, tool bars or scroll bars visible to the user. There is little evidence that you are using Excel at all.

Y12 References is a utility designed to make it easy for people to use, and easy to manage. References for each student are typed either directly into the system or into special files exported for that purpose. A report on all students can them be created at the end of the session.

## SYSTEM REQUIREMENTS

For use with ® Microsoft Office 97/2000/XP/2003/2007  
Windows 95, 98, 2000, XP, Vista, 7

A screen resolution of 800x600 or greater is required  
Suitable for multiple users on a network (RM Connect® Network friendly).

## CONTENTS

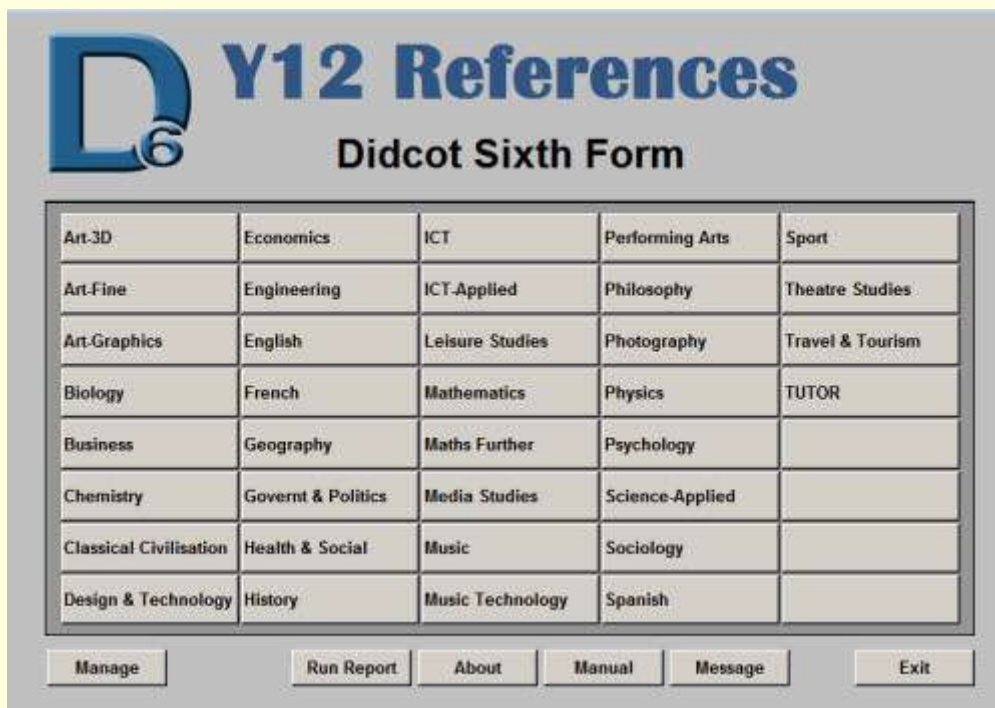
- 1) Introduction
- 2) Instructions for Use
  - Main Menu
  - Data Entry
  - Final Report
- 3) Installation
  - Upgrade an Existing Installation
  - New Installation
  - Files Installed
  - Upgrade History
  - Uninstallation
- 4) Management Instructions
  - New Installation and New Year Update Wizards
  - Site Customisation
  - Update Menu
  - Utilities Menu
  - Run Report
- 5) Error Messages
- 6) Registration

- 7) Licence Agreement
- 8) Contacts

If you are upgrading from an earlier version please refer to the **Upgrade History** first to see what has changed.

## INSTRUCTIONS FOR USE

### Main Menu



**The Menu Screen**

The buttons on the start screen perform the following functions:

**About**

**About** - gives a copyright message, version number and web address.

**Instructions**

**Instructions** - this button displays this instruction manual.

**Message**

**Message** - this button provides another chance to read the message that opens when the program starts.

**Run Report**

**Run Report** - opens the report template in Microsoft Word. This merges all the collected references to produce a report for each student. A special toolbar is provided for producing the report - (Office 2007 users will need to click on the 'Add-Ins' tab in order to see this toolbar.

**Manage**

**Manage** - this button (or key press **Ctrl/Shift/M**) enables the network

manager to customise and update all the information, and perform a number of other management tasks.

**Exit**

**Exit** - this button closes the program.

**Governt & Politics**

**Subject buttons** - selecting a subject will open up the data-entry screen for references to be entered for that subject.

**TUTOR**

**TUTOR button** - this will open up the data-entry screen for summary references to be entered by tutors.

## Data-Entry

Selecting a chosen subject button displays the following data-entry screen:

Record No	Help Sort Export Home				Teacher's	Reference(s)
	Zoom	Spell	Import	Exit		
	Surname	Forename	Reg	Adno		
1	Chapman	Leigh	NW	9036	CJS	Leigh possesses a great skill for independent study and expresses herself assuredly. She is articulate and is able to absorb critical concepts speedily. She possesses
2	Cox	Sarah	LJS	9052	CJS	Sarah is confident in her approach to English Literature, and frequently asks questions to clarify her understanding of detail. She shows great perseverance despite not always
3	Davis	Natalie	GSO	9052	CJS	
4	Howells	Amy	ASL	9103	CJS	Amy is an extremely conscientious student, highly committed to achieving the very best that she can. She has not found this level of English study easy, but she has always
5	Render	Natalie	ASL	9173	CJS	Natalie takes great pride in her work and is fully committed to everything she does. She displays a natural flair for delightful expression and concise analysis. Her contributions
6	Varney	Kiyah	UB	9210	CJS	Kiyah strives to do her best at all times, but does not find English Literature easy. She enjoys the subject, and has achieved a B grade for her AS coursework folder. This is
7	Astor	Simon	CHH	9096	JS	Simon has progressed well in English throughout year 12. He often contributes relevant ideas to group discussion showing that he is engaging with the texts studied. He is able
8	Clbad	Ryan	GSO	9042	JS	Ryan has shown a talent for English Literature and has approached the subject with interest and enthusiasm. He makes insightful contributions to class discussion leading
9	Cooper	Alicia	UB	9046	JS	Has dropped English
10	Cox	Lily	UB	9051	JS	Has dropped English
11	Damjanovic	Naomi	LJS	9058	JS	Naomi has made superb progress in English. She demonstrates a thorough understanding of texts studied and an appreciation of the writer's craft. She makes
12	Dent	Jennie	UB	9053	JS	Has dropped English
13	Gear	Zoe	ASL	9082	JS	Has dropped English
14	Guilbert	Adam	MR	9091	JS	Adam has shown interest and commitment to English Literature. Although quiet by nature he does make insightful contributions during group discussions, sometimes
15	Kingett	Florence	MR	9120	JS	Florence is an incredibly talented, thoughtful individual and demonstrates remarkable insight in English Literature. She shows detailed exploration of given texts, uncovering
16	Miss	Clare	CHH	9121	JS	Clare is a calm, mature individual who approaches English Literature with interest and

## Data-Entry Screen

The buttons on this screen perform the following functions (If they don't work then press the [Enter] key to finish entering data.):

**Help**

**Help** - describes the following buttons.

**Zoom**

**Zoom** - widens/narrows the rows thus allows you to see the whole comment entry.

**Sort**

**Sort** - Sorts the pupils in order of registration group, teaching class, teacher or surname (as highlighted)

**Spell**

**Spell** - runs the spellcheck on the comment column only. (Note: If you are using an old version of Microsoft Office (pre-2007) then the spell-check

function does not work well in Excel. It might be advisable to first create your comments in Word then, after spell-checking, copy and paste each comment separately.)

**Export** **Export** - creates your own copy of the sheet in your work folder. It is a good idea to export a copy of the data-entry file, exit the system and work on the copy at your leisure. Then import it back again when you have completed your references. Always export a copy for your own records when finished.

**Import** **Import** - allows you to import data from your own copy of the spreadsheet.

**Home** **Home** - returns you to the top of the screen.

**Exit** **Exit** - saves the sheet and closes the program.



More options may be obtained by right-clicking on the mouse to obtain a drop-down menu.

When you click on a cell a hint box will appear to help you know what to type in - you can drag it to one side if it gets in the way.

The first job is to look down the list and locate your students and enter your initials in the teacher column against each one. You can then click the [Sort] button until they are all put together.

If a student has joined recently and therefore does not appear in the list then please add their name and registration/tutor group to the bottom of the list.

Finally type in your references in the adjacent column.

PLEASE COMPLETE ONE EXTENDED PARAGRAPH USING THESE DETAILS AS A GUIDELINE:

- \* Level of subject knowledge and understanding with precise examples if possible, eg coursework; response to a particular project/area of the course.
- \* Subject-specific skills: eg ability to analyse/evaluate; practical skills; research skills; application of knowledge and understanding; problem-solving skills.
- \* Team skills/ presentation skills/ commitment to course.
- \* Please mention the subject or course title somewhere within the text otherwise we will not know what you are talking about on the finished document.
- \* Please note that a space is required after any punctuation in order to separate words properly.

---

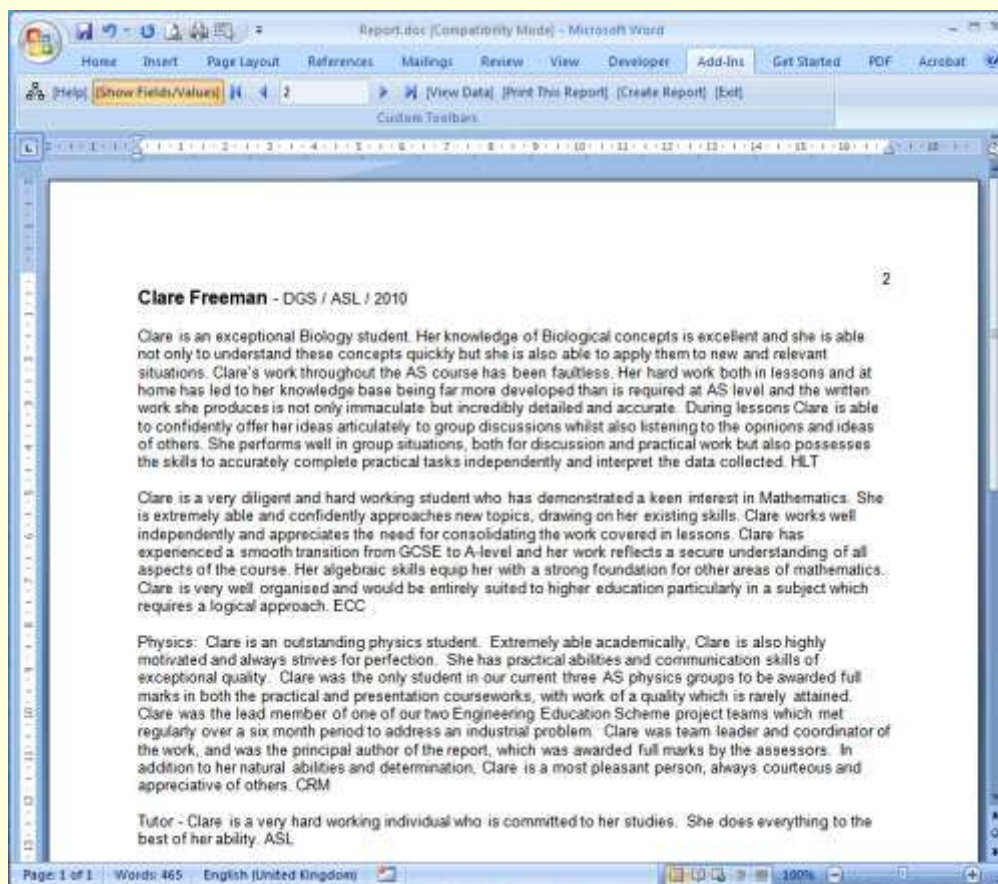
Note: When the workbook is loaded it should fully fill the screen. The Windows task bar should also disappear from the bottom. If however, you do wish to see the task

bar to gain access to other programs, press [Ctrl/Esc]. Sometimes during development the task bar has remained on screen. This appears to be a memory problem characteristic of the Windows 95/98 operating system following heavy use and will not occur on a freshly started machine. With Windows XP the task bar remains on the screen unless it is lowered manually by the user (not essential).

---

## Final Report

Merges all the references entered on the spreadsheet to produce a report for each student. A report may be produced for a single student, range of students, single tutor group, all tutor groups, or a specified range of students.



### Report Screen

The following will be required every time you run the report before this screen appears:

1. Click [Yes] when asked to open a document and run an SQL command.
2. Click [OK] to accept the default encoding for file conversion.

YOU SHOULD NOT NEED TO EDIT THIS REPORT TEMPLATE - any changes here will affect ALL of the reports. You are strongly advised not to make any changes here unless you know what you are doing. Any errors in the text displayed in this template should not be changed but should be corrected either in the original spreadsheet (preferred) or in the final merged document.

An extra toolbar is provided for use with the report document. To see this additional toolbar using Office 2007 you must click the [Add-Ins] tab in the top menu. Click the [Help] button for further information about producing a report.



Buttons are provided in this toolbar as follows:

[**Help**] - Displays this help text.

[**Show Fields/Values**] - Toggles between field codes and actual values - you only need to use this if the document starts up showing the codes rather than an actual student's report.

[|< < **1** > >|] - Type a pupil's record number in here and press the [Enter] key to see the report for that pupil. The arrows enable movement to the next or previous pupil.

[**View Data**] - Brings up a spreadsheet of all the information that will go on the pupils' reports. Use the scroll bars to move around the screen to obtain record numbers if needed. Note that any editing done here will not be permanent.

[**Print This Report**] - Will print the one report that is shown on the screen.

[**Create Report**] - Produces a merged document containing the reports for a single student, tutor group, all tutor groups, or a specified range of students. The document will be saved automatically in a folder called 'Y12 References' in your default documents folder for later copy and pasting into the UCAS forms. The filenames used are of the form 'Y12-Refs-2010-Report-ALL.doc'.

[**Exit**] - Returns to the main menu.

## INSTALLATION INSTRUCTIONS

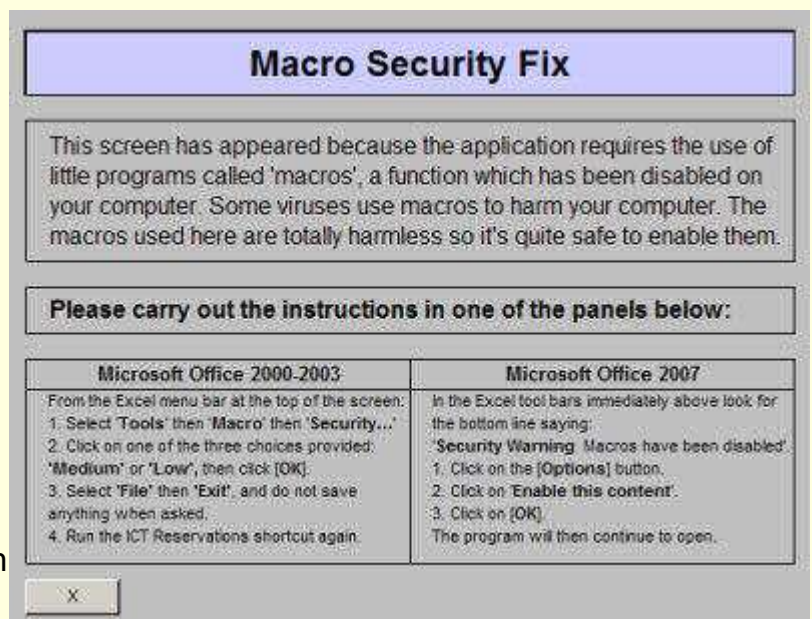
In order to install or upgrade this application you MUST:

be logged on with full system security permissions;

have exclusive access to all files throughout the process;

have the use of macros enabled in 'Excel' and in 'Word'.

The file you have downloaded is provided in compressed form as a self-extracting exe file. On execution it will unpack the files into a folder called 'Reservations' in your user's temporary directory. The installation procedure should then start automatically. If it doesn't start automatically then search for the above mentioned folder and open 'Setup.xls'.



As this product relies totally on the use of macros you must have macro security set correctly for the program to run. If not then instructions may appear to show you how to change the security. You will then need to exit the program and execute the downloaded file again.

## **Upgrade an Existing Installation:**

DO NOT do this when a reporting session is in progress.

**Setup program** - Within the Setup program browse to the installation folder. Click the [Upgrade] button when ready. Exit once the finish installation screen appears.

**Check and test** - A new shortcut will have been placed on your desktop during the installation. Run the program and select the [Run Report] button. The first time you do this after installation you will be asked a few things:

1. Click [Yes] when asked to open a document and run an SQL command. You may be asked this twice.
2. If asked to find the data source: browse to <installation folder>\Results and select 'RESULTS.CSV'.
3. Click [OK] to accept the default encoding for file conversion.
4. The report document will then appear on the screen. Press [Ctrl/S] to save the changes.

**New Year Update** - Exit the report and select the [Manage] button to open the management console then select the [New Year Update] button. This will run a wizard to guide you through what to do next. See [below](#).

## **New Installation:**

**Setup program** - This package is intended for network use and should be installed from a management station onto a mapped network server drive. The suggested location is 'X:\Staff\References' but you can put it anywhere you like depending on restrictions on your network - users will need to be given full access permissions on the folder and files.. Click the [Install] button when ready and installation will proceed. Have your registration certificate available. Exit once the finish installation screen appears.

**Check and test** - A new shortcut will have been placed on your desktop during the installation. Run the program and select the [Run Report] button. The first time you do this after installation you will be asked a few things:

1. Click [Yes] when asked to open a document and run an SQL command. You may be asked this twice.
2. If asked to find the data source: browse to <installation folder>\Results and select 'RESULTS.CSV'.
3. Click [OK] to accept the default encoding for file conversion.

4. The report document will then appear on the screen. Press [Ctrl/S] to save the changes.

**Make shortcut available** - A new shortcut will have been placed on your desktop during the installation. Make the shortcut available to your users in the normal way.

**Set permissions** - Network users must have full read, write and delete permissions on the installation folder. If you do not get this correct then the users will get an error message when trying to save. They may also find the file saved in their own work area, which will need to be deleted.

Open Windows Explorer on the server and locate the installation folder. Right-click on the folder icon to get the context menu and select Properties.  
Select the Security tab then click on the Permissions button.  
Remove 'Everyone' and/or 'Domain Users' and add your target user group, eg. 'Staff'.  
Set the permissions to 'Change', 'Modify', or similar depending on your operating system.

**Set macro security** - For the package to work best, the default macro security level in Excel should be set to 'Low' or 'Medium'.

**RM Connect 3 Network** - users must belong to the 'Advanced Staff' user type, otherwise macros cannot be run at all. The first time the program is run the user will be asked to reset the macro security themselves by following the instructions provided on screen, then (pre-Excel2007 only) exit the program and try again. After that it will simply flash through every time and continue loading the package. They will not be asked to perform that operation again (pre-Excel2007 only) unless their profile has been reset by an administrator. If they decide to set the security level to 'Medium' then they will be asked if they want to enable macros every time they run the package. However, it is only a simple matter of clicking on the [Yes] button to allow the package to continue loading. A 'Low' setting may leave the system open to potential infection by macro viruses if you do not have an up to date antivirus system installed.

You can set the macro security in advance and permanently as follows:

Open the RM Management Console. In the left-hand pane under 'Configuration Settings' select 'User Types'.

If you are already using your own copy of the Advanced Staff user type then go on to the next step, otherwise In the right-hand pane right-click on the Advanced Staff user type. Select the 'Copy User Type' option and give it a new name.

Right-click on this copy of the Advanced Staff user type and select 'Custom Settings' from the bottom of the 'Category' drop down list.

Click on the 'Add' button and browse to the folder this package was installed.

Locate the file 'FixOfficeMacros.reg'.

If necessary change the user type for all your staff users to the new user type you have just created.



**Other Networks** - your system must NOT have a policy set to prevent users from enabling macros and they must have access to macro security in the Excel 'Tools' menu. The first time the program is run the user will be asked to reset the macro security themselves by following the instructions provided on screen, then (pre-Excel2007 only) exit the program and try again. After that it will simply flash through every time and continue loading the package. They will not be asked to perform that operation again (pre-Excel2007 only) unless their profile has been reset by an administrator or they do not have permission to save their profiles or registry settings. If they decide to set the security level to 'Medium' then they will be asked if they want to enable macros every time they run the package. However, it is only a simple matter of clicking on the [Yes] button to allow the package to continue loading. A 'Low' setting may leave the system open to potential infection by macro viruses. If possible run or apply the file 'FixOfficeMacros.reg' to all users. This will enter the installation path as a 'Trusted Location' into the windows registry for Excel 2007 and remove macro security completely for earlier versions. If you wish to maintain a moderate degree of security when using earlier versions then use a text editor to change all the '00000001' entries to '00000002'. The user will then be asked to allow macros every time they open the program.

**Stand-alone installation** - for old versions of Excel you will have already dealt with this matter during the installation procedure. If you are using Excel 2007 then run the file 'FixOfficeMacros.reg'. This will enter the installation path as a 'Trusted Location' into the windows registry.

**Test it works** - Log on as a normal staff user and test to see if you can open the program, write a reference, and save it. If any problem occurs then recheck 3, 4, or 5 above.

**Customise for your establishment** - From the main menu select the [Manage] button to open the management console then select the [New Installation] button. This will run a wizard to guide you through what to do next. See [below](#).

## **Files Installed:**

The following files are installed in the destination folder:

**HelpMgr.txt** - help texts and messages for management tasks.

**HelpRefUser.txt** - help file for users on the reference data-entry screen..

**HelpReportUser.txt** - help file for users on the report screen..

**MacrosR.xls** - all the clever stuff to make it all work.

**Message.txt** - the message to staff that appears at start up. It can contain latest information and deadline dates.

**ReadMeFirst.txt** - brief installation notes provided during setup.

**Register.htm** - registration document for you to fill in and post if you wish to make full use of this package.

**Setup.txt** - instructions and messages given during installation.

**Setup.xls** - the installation program.

**Start.xls** - the opening menu of subjects.

**FixOfficeMacros.reg** - specially created during setup to include the installation path as a 'Trusted Location' in Excel 2007, which will allow only our macros to run without having to allow all macros from other sources. Allocate to users if you wish the macro security to be set automatically, otherwise they will be asked to set it themselves every time they run the program. Also contains keys for earlier versions of Excel to remove macro security completely. If you wish to maintain a moderate degree of security when using earlier versions then use a text editor to change all the '00000001' entries to '00000002'. The user will then be asked to allow macros every time they open the program.

**Help folder** - this manual you are reading now and associated text and images.

**References folder** - contains **Results.xls**, the data-entry file containing all the references and **Report.doc** the report writing mail merge template.

**Sims Report Defs folder** - contains **Students Y12.RptDef**, **Subjects Y12.RptDef** and **Teaching Staff.RptDef** for importing into SIMS to create current student, subject and staff lists.

## **Upgrade History:**

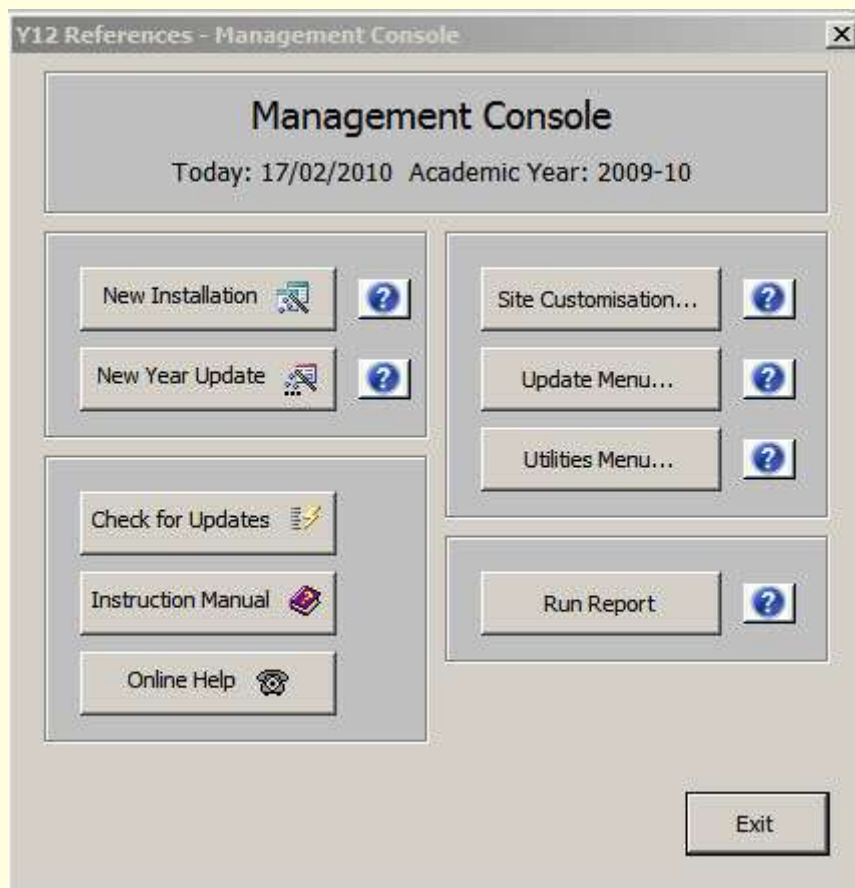
**Version 1.00** - 2004 - A first attempt intended for internal school use for writing reports for all age groups.

**Version 1.01** - 2009 - Reduced to service Y12 references only. Management facilities vastly simplified and improved.

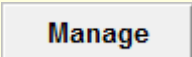
## **Uninstallation:**

To uninstall the software simply delete the whole folder in which you installed it, and delete any shortcuts copied elsewhere.

# MANAGEMENT INSTRUCTIONS



## The Management Console

Clicking the  button on the Start Screen will take you to the Management Console. First you will be asked to enter a password which is initially set to:

**manage** (case sensitive)

You will be warned if anyone else on the network is currently using the program otherwise any changes they are making will be lost. No-one else will be able to open the package once you have the package open in management mode. They will get a message asking them to try again later and the program will then shut down automatically.

Buttons are provided on the Management Console so you can easily update and customise, and then reset everything again for use without having to worry about what is involved and how to do it. The function of each button is described in detail below,

## New Installation and New Year Update Wizards

These buttons run a wizard that will guide you through all the necessary procedures to be performed with either a new installation or to perform an update each year prior to the start of a reporting session. It will guide you through all the procedures

outlined below for the [Site Customisation] and the [Update Menu] buttons on the management console.

Before you start you will need to have some lists ready - your staff, students and subjects they study. These should be in the form of csv or xls files obtained via SIMS, or similar. Three pre-prepared report definitions templates for importing into Sims.net are available in a folder called 'Sims Report Defs' in the installation folder. Using these templates you can create reports in Sims.net that are suitable for importing into this software. Otherwise consult with your School Information Manager - see below for full details of the three lists that are required. You may store the resulting files in a folder called 'Y12 References\School Data' which has been created in your default documents folder.

## Site Customisation

The screenshot shows a dialog box titled "Y12 References - Site Customisation". The main heading is "Site Customisation". It contains the following fields and options:

- Name of Institution:** A text box containing "Didcot Sixth Form" and a help icon.
- Registration Code:** Four separate text boxes for entering a code, with a help icon.
- Management Password:** A text box containing "manage", a "Default: 270950" label, and a help icon.
- Screen Image:** Two checkboxes: "Remove Logo" (unchecked) and "Replace Logo" (unchecked). Below "Replace Logo" is a text box, a "V" button, and a help icon.

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Apply".

**Name of Institution** - Enter the name of your school or college. Maximum around 30 characters. This will appear immediately on the Menu Screen (but not on the Start Screen until you have 'Applied Changes').

**Registration Code** - When you register you will receive a registration code, enter this in the panel provided. It is case sensitive and contains no spaces. Without the registration code many of the reconfiguration procedures will not work. Keep your registration document in a safe place in case you need to re-enter the code after downloading an upgrade.

**Management Password** - This is required for you to enter the Management Console. It can be changed here. Remember that it is case sensitive. If you forget

your password then use the default password: 270950, which may be found on your registration document.

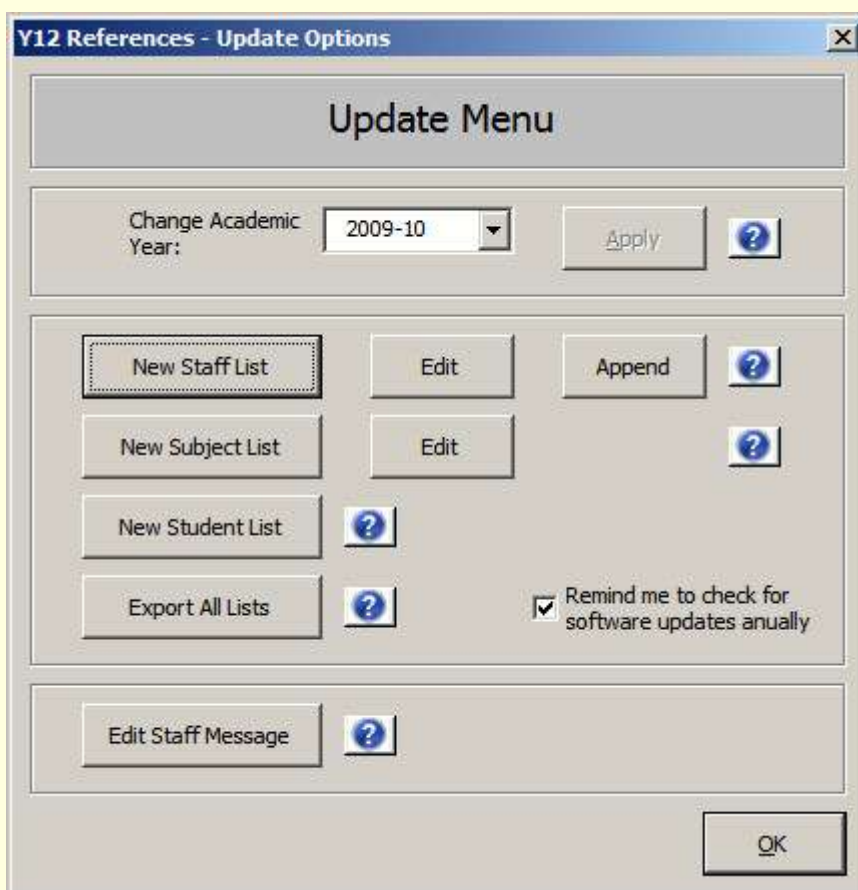
**Remove Logo** - You can remove the current logo after installation if you do not have one of your own ready.

**Replace Logo** - The size and shape of your logo should be about 85-120 pixels wide by 110-120 pixels high. Consider saving in transparent gif format so that any unwanted background colour outside the design will not be visible.

**WARNING:** You MUST check the size and shape of your image carefully. If it is too big then you may have trouble removing it, should you need to. Before opening an image, right-click on the filename and select 'Properties'. Click on the 'Summary' or 'Details' tab and, if necessary, click the [Advanced >>] button. You will then see the width and height value in pixels.

## Update Menu

Provides a set of options to be carried out prior to the start of each year's reporting session.



**Change Academic Year** - Fill in the current academic year, eg. 2009-10. This should be updated each year prior to a reporting session.

**[New Staff List]** - Import a new list of all teaching staff. This can be done at any time.



On selecting this option you will first be asked to locate and open the file containing the new list, then identify which fields to import - see **Import New ..... List** below.

A pre-prepared report definitions template called 'Teaching Staff.RptDef' for importing into Sims.net is available in a folder called 'Sims Report Defs' in the installation folder. Using this template you can create a report that is suitable for this task. Otherwise consult with your School Information Manager. You may store the resulting file in a folder called 'Y12 References\School Data' which has been created in your default documents folder.

The list must be in the form of a csv or xls file with the following 5 columns, not necessarily in the same order. The column headings do not have to be the same as shown below. You may have columns of other data but these ones must be within the first six:

Initials	Title	Forename	Surname	School
JS	Miss	Jenny	Shipton	DGS
IDL	Mr	Ian	Lee	DGS

Note the following:

The file exported from Sims.net contains column headings by default. If your columns have no heading of their own then remember to untick the checkbox provided, otherwise you will lose the first item and have to enter it manually.

The file exported from Sims.net may initially contain repetitive names and empty spaces, and the full name of the school may appear instead of initials - click the [Reformat] button to rectify these and redisplay the data; but if not then all will be done anyway before the file is imported.

If you want all surnames to remain or appear in upper case (ie. all capital letters) then remember to tick the checkbox provided,. Untick the checkbox if you want all surnames to remain or appear in proper or name case (ie. capital initial letters only). Click the [Reformat] button to redisplay the data.

**[Append]** - Add another list of teaching staff to the existing list. Useful if you have a joint sixth form with another school.

**[Edit]** - Make small changes, additions or deletions to the list.

**[New Subject List]** - Import a brand new list of AS/A2 Subjects from a csv or xls file. This must be done prior to a reporting session and cannot be repeated once the session has started unless you are just making spelling corrections.

On selecting this option you will first be asked to locate and open the file containing the new list, then identify which fields to import - see **Import New ..... List** below.

A pre-prepared report definitions template called 'Subjects Y12.RptDef' for importing into Sims.net is available in a folder called 'Sims Report Defs' in the installation folder. Using this template you can create a report that is suitable for this task. Otherwise consult with your School Information Manager or as the file is just a simple list of subjects you could create it manually. You may store the resulting file in a folder called 'Y12 References\School Data' which has been created in your default documents folder.

The list must be in the form of a csv or xls file. The file may contain columns of other data but all the subjects must be listed in a single column within the first six:

Subject
Chemistry
Design & Technology
Mathematics

Note the following:

This procedure must be done prior to a reporting session and must not be repeated once the session has started unless you are just making spelling corrections that do NOT change the order of the subjects.

There is a maximum of 40 subjects allowed, including TUTOR.

The file exported from Sims.net may initially contain repetitive subjects and empty spaces - click the [Reformat] button to remove them; but if not then all will be done anyway before the file is imported.

The names used in Sims may not be perfect. Either [Export All Lists] then edit the exported subject list using Excel on another station and import it again or by using the [Edit] button.

The file exported from Sims.net contains column headings by default. If your columns have no heading of their own then remember to untick the checkbox provided, otherwise you will lose the first item and have to enter it manually.

TUTOR will be added or moved to the end of the list of subjects. If you do not want TUTOR in the list then untick the checkbox provided - then if it is already in the list it will be removed.

**[Edit]** - Make small changes, additions or deletions to the list.

**[New Student List]** - Import a new list of students from a csv or xls file obtained via SIMS, or similar. This must be done prior to a reporting session and cannot be repeated once the session has started as all references will be deleted. Further students, arriving since the reporting session has started, may be added manually to

the bottom of the list on the main data-entry screen or teachers may add them to the separate data-entry file exported for their own subject.

On selecting this option you will first be asked to locate and open the file containing the new list, then identify which fields to import - see **Import New ..... List** below.

A pre-prepared report definitions template called 'Students Y12.RptDef' for importing into Sims.net is available in a folder called 'Sims Report Defs' in the installation folder. Using this template you can create a report that is suitable for this task. Otherwise consult with your School Information Manager. You may store the resulting file in a folder called 'Y12 References\School Data' which has been created in your default documents folder.

The list must be in the form of a csv or xls file with the following 3 columns (fields), not necessarily in the same order. The column headings do not have to be the same as shown below. You may have columns of other data but these ones must be within the first six:

Surname	Forename	Reg
Blogs	Fred	JS
Other	Anne	IDL

Note the following:

This procedure must be done prior to a reporting session and cannot be repeated once the session has started.

The file exported from Sims.net may initially contain a number 12 for the year as part of the registration group - click the [Reformat] button to remove it; but if not then all will be done anyway before the file is imported.

The file exported from Sims.net contains column headings by default. If your columns have no heading of their own then remember to untick the checkbox provided, otherwise you will lose the first item and have to enter it manually.

If you want all surnames to remain or appear in upper case (ie. all capital letters) then remember to tick the checkbox provided,. Untick the checkbox if you want all surnames to remain or appear in proper or name case (ie. capital initial letters only). Click the [Reformat] button to redisplay the data.

New students may be added manually to the bottom of the list on the main data-entry screen or teachers may add them to the separate data-entry file exported for their own subject.

**Import New ..... List** - Each column to be imported must be given a heading that the program will understand by selecting from the drop-down boxes provided. In some cases this may already have been worked out for you. All the

available heading options must be used and used once only. Here is an example:

Y12 References - Import New List

### Import New Student List

File to import: C:\Users\user\Documents\Y12 References\School Data\Sample\Students-sample.x No. of records: 20

Select a heading for each column you wish to import: (You must find a column for all 3 headings)

Surname	Forename	- Not Used -	- Not Used -	Reg	- Not Used -
Surname	Forename	Gender	Year taught in Co	Reg	DOB
ALDERSON	Paula	F	12	12LJG	06 September 19
ARNOLD	Nathan	M	12	12LJG	16 August 1993
ASTOR	David	M	12	12ASL	03 February 199
BAKER	Sam	M	12	12MR	20 May 1993
BATES	George	M	12	12CHH	05 January 1993
CHARLES	Sean	M	12	12MR	08 May 1993
COOK	Lorna	F	12	12GSO	14 June 1993
COOPER	Thomas	M	12	12MR	25 January 1993
COX	Natalie	F	12	12IJB	25 October 1991
DAVIS	Kate	F	12	12GSO	28 May 1993
DEWAN	Sally	F	12	12LJG	14 November 199
FREEMAN	Clare	F	12	12ASL	27 March 1993
GRAHAM	Steven	M	12	12MR	03 August 1992
HAWKINS	Jessica	F	12	12GSO	31 August 1993
HUMPHRIES	Diana	F	12	12CHH	02 June 1993
JACKSON	Luke	M	12	12IJB	01 December 199
KELLY	Jack	M	12	12CHH	24 August 1993
LEE	Ben	M	12	12ASL	30 October 1992
LOW	Louise	F	12	12IJB	23 June 1993

First item in each column is a heading  
 Surnames in upper case

Reformat Back Cancel OK

**[Back]** button - check the data to make sure that you have selected the correct file. If not then click this button to go back and select another file.

**[Reformat]** button - The file exported from Sims.net may contain repetitions, empty spaces, or data that needs fine adjustment; so you may notice that the number of records and other things are not quite displayed as expected or wanted. Click this button to rectify and redisplay the data; but if not then all will be done anyway before the file is imported.

**First item in each column is a heading** - Reports obtained from Sims.net have column headings by default. If your columns have no heading of their own then remember to untick this checkbox, otherwise you will lose the first item and have to enter it manually later.

Import New Staff List and New Student List only:

**Surnames in Upper Case** - Tick this checkbox if you want all surnames to remain or appear in upper case (ie. all capital letters). Untick the checkbox if you want all surnames to remain or appear in proper or name case (ie. capital initial letters only). Click the **[Reformat]** button to redisplay the data.

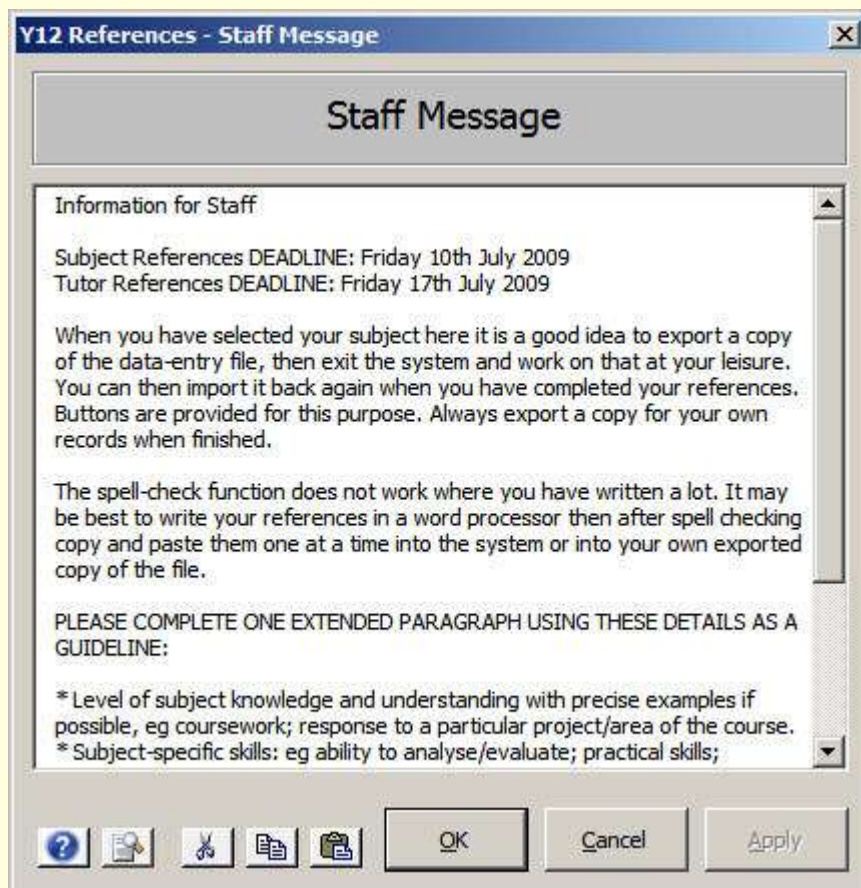
Import New Subject List only:

**Include TUTOR in list of subjects** - Leave this checkbox ticked if you want

references from tutors, if it is not already in the list then it will be added. Untick the checkbox if you do not want TUTOR in the list, if it is already in the list then it will be removed.

**[Export All Lists]** - Export the staff, students and subjects lists after they have been changed within this system. The files will be saved in a folder called 'Y12 References\School Data' in your default documents folder. The filenames used are of the form 'Y12-Refs-2010-Student-List.csv'. Note that each list is exported automatically when you import a new list or edit the current list.

**[Edit Staff Message]** - Change message, deadline dates, etc. presented to staff when the program is opened. If you decide to send them the exported data-entry files (see [Bulk Export]), then this file will be included. This is the message that is displayed as a splash screen when the program starts or from the button provided on the menu screen. It will enable you to provide up-to-date information concerning deadline dates, instructions, etc.. If you decide to send staff the exported data-entry files (see [Bulk Export]), then this file will be included.



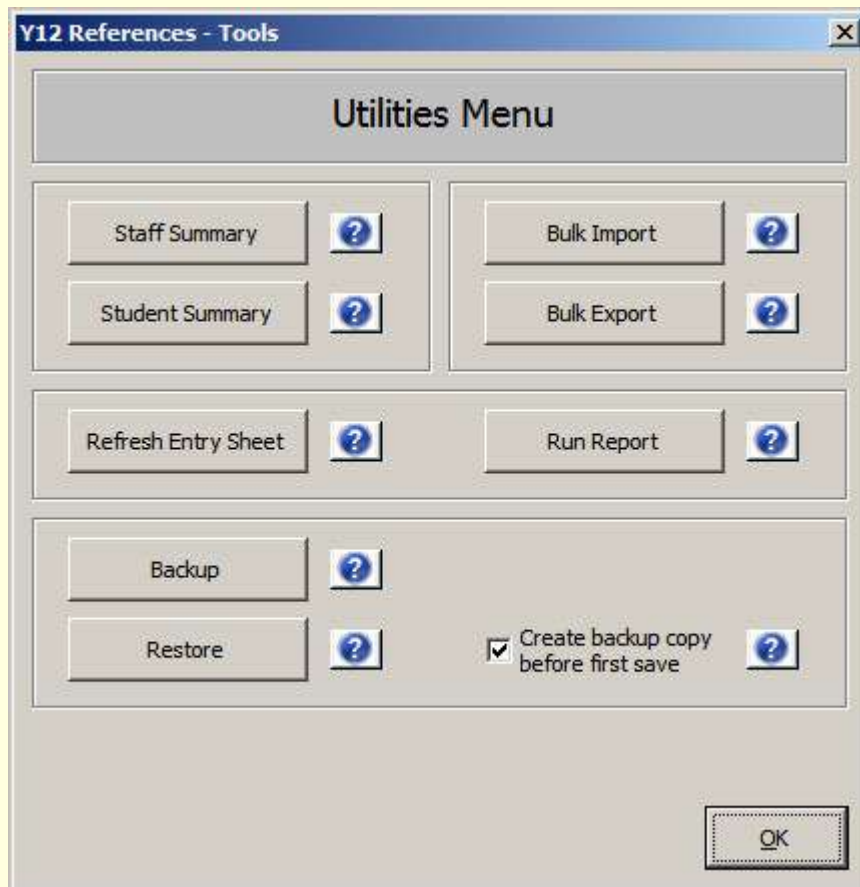
Use the space provided to edit the message. To stop the message displaying simply remove all the text.

The buttons [Cut], [Copy] and [Paste] are provided at the side of the screen. The [Read] button will show you the text as it will appear to the user - remember to click [Apply] to update the text first.



## Utilities Menu

Provides some useful tools that can be used during the year's reporting session to help keep track of progress.



**[Staff Summary]** - Provides a list of subjects for which no references at all have yet been entered. A list of staff who have entered at least one reference. Tutors are listed separately to see who has or hasn't done their tutor reference. A csv file called 'Y12-Refs-YYYY-Staff-Summary.csv' is created in a folder called 'Y12 References' in your default documents folder. The letters YYYY are replaced with the current year. A previously stored backup made during the same year will be replaced without warning.

**[Student Summary]** - Provides a list of all students and the number of subjects for which they have received a reference. A csv file called 'Y12-Refs-YYYY-Student-Summary.csv' is created in a folder called 'Y12 References' in your default documents folder. The letters YYYY are replaced with the current year. A previously stored backup made during the same year will be replaced without warning.

**[Bulk Import]** - Bulk Import Data-Entry Files . Opens up a loop for continuous importing of data-entry files. These files will have been previously exported for staff to fill in with their student references and sent back to you to import, if they don't do it themselves.

**[Bulk Export]** - Bulk Export Data-Entry Files. Creates a data-entry file for each subject which you can then email to the staff concerned. They then fill in their student references and send it back to you to import (using the 'Bulk Import' option). I find it more convenient to zip them all up and send it to everybody on a mailing list. The files will be saved in a folder called 'Y12 References\Export' in your default documents

folder. Two readme text files will be included. The first will be a copy of the program startup message to staff giving general information and deadline dates. The second provides assistance on what to do with the files they have been sent.

**[Refresh Sheet]** - Refresh Data-Entry Sheet. This action will rebuild the primary data-entry sheet and repair any mess made by users doing strange things when entering or pasting data from other sources. It can take up to 2 minutes or more. This should be done when required, especially if new students have been added to the original list and before the reports are created but not critical.

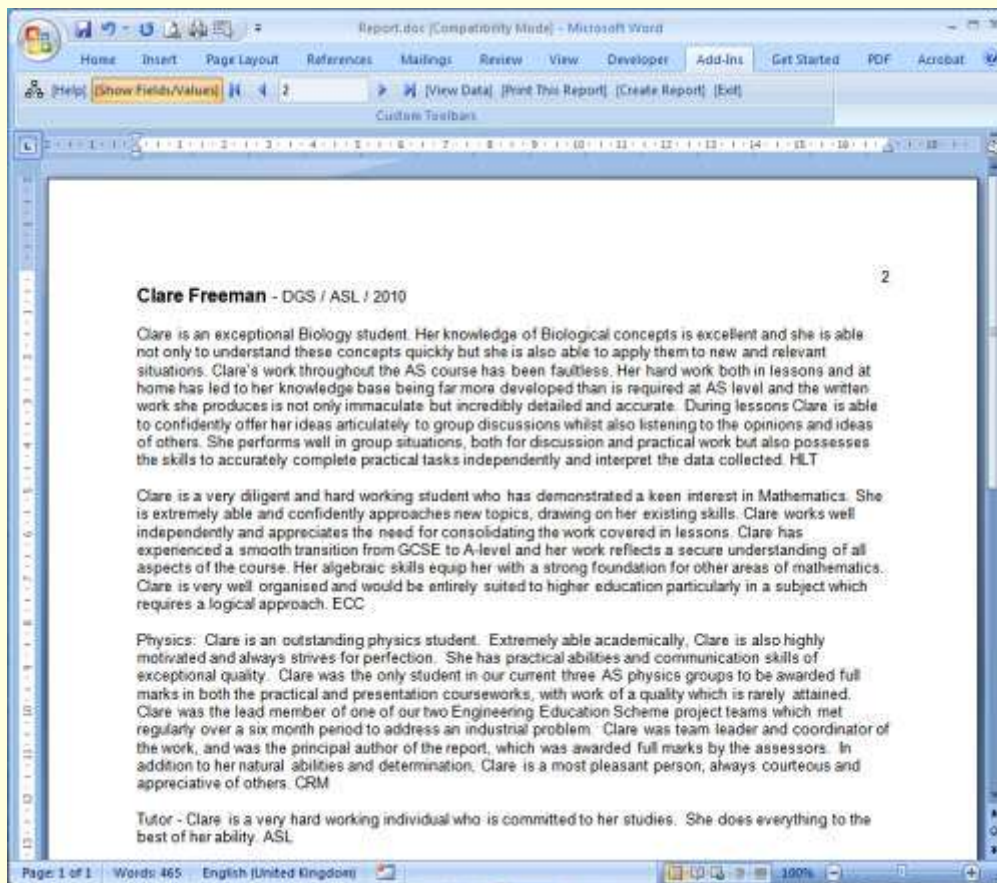
**[Backup]** - Creates a management backup copy of the data-entry file "Results.xls" as "Y12-Refs-YYYY-Results.xls" where the letters YYYY are replaced with current year. The backup copy will be found in the 'Backup' folder inside the installation folder and also in a folder called 'Y12 References' in you default documents folder. A previously stored backup made during the same year will be replaced without warning.

**[Restore]** - Restores the data-entry file "Results.xls" from the last backup. Locate the backup files either in the installation folder or in the folder called 'Y12 References' in you default documents folder.

**Create backup copy before first save** - Tick the check-box if you want a backup copy of the data-entry file "Results.xls" to be made before a user saves any changes. This backup copy has the same name as the original file. A backup will only occur the first time the user saves during a session and it will replace a previous backup without warning. In the unlikely event that the file should then in some way be damaged by the user you will be able to restore it easily from the 'Backup' folder.

## **Run Report**

Merges all the references entered on the spreadsheet to produce a report for all students.



The first time you do this after installation you will be asked a few things before this screen appears:

1. Click [Yes] when asked to open a document and run an SQL command. You may be asked this twice.
2. If asked to find the data source: browse to <installation folder>\Results and select 'RESULTS.CSV'.
3. Click [OK] to accept the default encoding for file conversion.
4. The report document will then appear on the screen. Press [Ctrl/S] to save the changes.

The following will be required every time you run the report before this screen appears:

1. Click [Yes] when asked to open a document and run an SQL command.
2. Click [OK] to accept the default encoding for file conversion.

YOU SHOULD NOT NEED TO EDIT THIS REPORT TEMPLATE - any changes here will affect ALL of the reports. You are strongly advised not to make any changes here unless you know what you are doing. Any errors in the text displayed in this template should not be changed but should be corrected either in the original spreadsheet (preferred) or in the final merged document.

An extra toolbar is provided for use with the report document. To see this additional toolbar using Office 2007 you must click the [Add-Ins] tab in the top menu. Click the [Help] button for further information about producing a report. Toolbar details are also shown in the user instructions above.

A report may be produced for a single student, range of students, single tutor group, or all tutor groups. The file will be saved automatically in a folder called 'Y12

References' in your default documents folder. The filenames used are of the form 'Y12-Refs-2010-Report-ALL.doc'.

When you have finished your management session you should click the exit button, which will then go through the process needed to re-enable shared use across the network. If you run the workbook to see how it looks and forget to go back and do this here, never mind, as the re-sharing routine will be activated if necessary when you finally exit the workbook.

## **ERROR MESSAGES**

[A document with the name 'Macros.xls' is already open. You cannot open two documents with the same name ... ]

This error will occur if the links between files have got corrupted and will occur when any of the buttons on the menu screen is pressed. Hold down the keys [Ctrl] and [Shift] while hitting [M], this will fix the links and enter the management mode. You will need your management password.

## **REGISTRATION**

To register please print out the **registration form** included with the download package.

You can either pay by PayPal or send a cheque drawn on an British bank account or international money order to the value shown on the registration form.

When the cheque has cleared or within a day of receiving payment by PayPal you will be emailed your registration details. You will be sent a receipt, a licence certificate and information to enable you to download the latest Pro version of the software.

## **LICENCE AGREEMENT**

In this document the following definitions are used:

The Copyright Holder: Ian Lee.

The Software: Y12 References

Registration Code: A 15 alpha-numeric character code issued by The Copyright Holder signifying that you have Registered The Software.

Registration or Register: The process by which you pay The Copyright Holder a fee to receive a Registration Code that signifies

you have Registered The Software.

Registration Certificate: A certificate issued by The Copyright Holder on which is printed your Registration Code and your END-USER LICENCE AGREEMENT.

Please read the following terms and conditions carefully BEFORE using The Software. Your use of The Software indicates your acceptance of this End-User Licence Agreement unless otherwise confirmed in writing by The Copyright Holder.

This release of The Software is a SHAREWARE version. You are required to Register The Software if you plan on using The Software for more than thirty (30) days. Whilst The Software has been tested on Windows 95 and 98, NO WARRANTY OF ANY KIND is provided, and no responsibility or liability will be accepted for any damage, loss of data, profits, or any other unmentioned consequences resulting from the use of The Software.

The Software is a SHAREWARE application. It may not be distributed by anyone, unless prior written permission has been obtained from The Copyright Holder.

The Software and its source code remain the property of The Copyright Holder. No modifications by anyone other than The Copyright Holder may be made or released unless the author has given prior permission in writing.

All additional files included with this software remain the property of The Copyright Holder. This includes all documentation that you received with it.

Registered users are required to see their Registration Certificate for their licence agreement.

Unregistered users are licensed to use The Software for NO MORE than thirty (30) days. If you wish to use The Software for more than thirty (30) days you are required to Register The Software by the process outlined in this file. You may not reinstall, hack, crack, break, reverse engineer, decompile, edit, or otherwise modify The Software in order to use The Software for a further period of time, or to reverse the limiting of features.

Any breach of this licence will be viewed as software piracy and will be acted upon as such. The laws of the United Kingdom shall govern this agreement.

## **CONTACTS**

Email: [ian@idlee.co.uk](mailto:ian@idlee.co.uk)

Web Site: <http://www.idlee.co.uk/download>

Any reports of bugs, ideas, or suggestions will be gratefully received.

Ian Lee