
sERP Documentation

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Darrel Technologies Ltd

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SchoolERP (sERP) is a comprehensive management and automation software suite designed to meet the management and administration needs of basic and SHS schools in Ghana.

sERP caters to virtually every aspect of school management and administration, from student records management to staff and stakeholder communications.

FEATURES

- Student information - bio data, class/attendance information and academic reports
- HR - staff records management and tax/regulatory compliance
- Finance - billing, payments/collections, debtors, banking and expenditure/petty cash management
- Messaging - bulk, individual/personalized, academic and financial SMS functions, including payment notifications
- PoS - store sales and inventory management
- Analytics & Reporting - detailed finance, academic and class attendance reporting; plus student enrollment and varied statics

GETTING STARTED

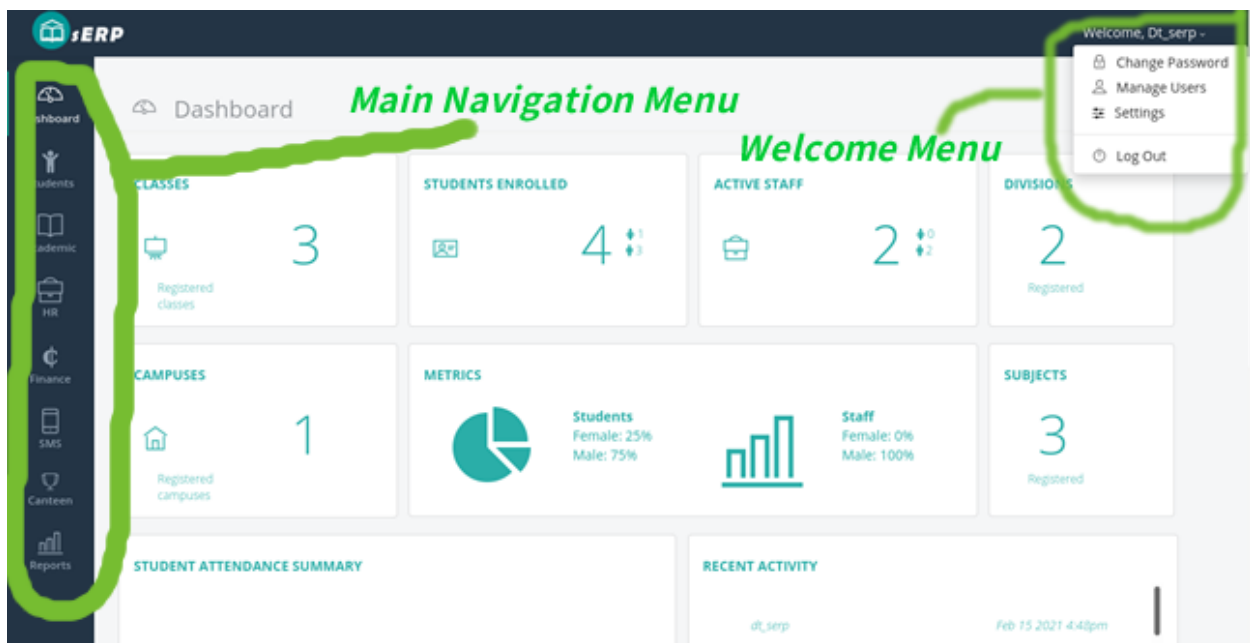
- *Initial Setup* – Configure sERP for first time use
- *Changing your Password*
- *Using sERP* – Modules and features
- *User Management* – Users and access roles
- *Troubleshooting*
- *FAQs* – Frequently asked questions

DOCUMENTATION REFERENCE

3.1 Getting Started

This section provides useful and important information required to get you up and running. It covers the basics of the software, as well as the steps required to get your sERP installation ready for use.

3.1.1 Layout & Overview



3.1.2 Initial Setup

This section covers initial steps needed to prepare your sERP installation for first use. These steps should be performed in order to begin using sERP.

Change default password

Your sERP welcome email contains an admin password required to log in to sERP. You should ideally change this password.

Tip: Check out our [Changing your Password](#) guide for more information.

Note: We recommend that your password meets the following criteria:

- Minimum of 8 characters (required)
 - A mixture of both uppercase and lowercase letters
 - A mixture of letters and numbers
 - Inclusion of at least one special character, e.g., ! @ # ?]
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Configure School Details

Enter basic information about your school. This information is generally used across different sections and modules in the sERP ecosystem.

Tip: Check out our [General Settings](#) configuration guide for more information.

Configure Student ID Prefix

sERP utilizes a combination of the student ID prefix and the class code when generating student IDs. The student ID prefix has to be configured in order for sERP to be able to auto generate student IDs during registration.

The student ID format is illustrated below:


{Student_ID_Prefix} {Class_Code} {Incremental_Number}

DT / P1 / 001

The diagram illustrates the student ID format. At the top, three placeholders are shown: {Student_ID_Prefix}, {Class_Code}, and {Incremental_Number}. Below these, a large green arrow points from the first placeholder to the second, and another large green arrow points from the second to the third. Below the arrows, the example 'DT / P1 / 001' is shown in large green letters.

To configure the student ID prefix:

1. From the [welcome menu](#), click on “Settings”

2. From the general settings page, click wrench () icon next to “Student ID Prefix”
3. In the “Student ID Prefix”, enter the value you wish to use as the student ID prefix
4. Click “Save”


Configure Staff ID Prefix

The staff ID prefix is required to auto generating staff IDs in sERP. The staff ID format is illustrated below:

{Staff_ID_Prefix} *{Incremental_Number}*

DTST / 001

To configure the staff ID prefix:

1. From the *welcome menu*, click on “Settings”
2. From the general settings page, click wrench () icon next to “Staff ID Prefix”
3. In the “Staff ID Prefix”, enter the value you wish to use as the staff ID prefix
4. Click “Save”

Add Campuses/Locations

1. From the *main navigation menu*, go to Students -> Campuses
2. From the “Add Campus” pane, enter the name of campus next to “Campus Name”

Tip: You can add multiple campuses at a go by clicking on the (+) icon

3. Click on “Add Campus/es”

Add Divisions

1. From the *main navigation menu*, go to Academic -> Divisions
2. From the “Add Division” pane, enter the name of division next to “Division Name”

Tip: You can add multiple divisions at a go by clicking on the (+) icon

3. Click on “Add Division/s”

Configure Default Academic Calendar

The default academic calendar setting informs sERP about the current academic term/year. The default academic calendar needs to be configured for both the “Trimester” and “Semester” categories.

Tip: Check out our [Default Academic Calendar](#) configuration guide for more information.

Add Classes

1. From the [main navigation menu](#), go to Academic -> Classes
2. Click the drop down arrow (▼) in the “Add Class” pane to reveal the form options
3. From the “Add Class” pane, enter the following:

Note:

- **Academic Calendar:** select the academic calendar category for the class
 - **Class Name:** enter the name of the class as you’d like it to appear
 - **Campus:** select the campus/location where this class belongs
 - **Division:** select the division this class belongs
 - **Class Teacher:** select and assign a class teacher for this class. (*This requires a user account to have been created, and assigned to a staff in sERP*)
 - **Class Code:** enter a code for this class. (*This is required for [student ID generation](#)*)
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Tip: You can add multiple classes at a go by clicking on the drop down arrow (▼) in the “Quick Add Class(es)” pane

4. Click on “Add Class”

Add Staff Departments


1. From the [main navigation menu](#), go to HR -> Departments
2. From the “Add Department” pane, enter the name of the department in the box next to “Department Name”

Tip: You can add multiple departments at a go by clicking on the (+) icon

3. Click “Add Department/s”


Add Staff Designation

Staff types or designation represent the posts/position of staff in your school, and is required when adding staff information in sERP.

1. From the *welcome menu*, click on “Settings”
2. Next, click on “HR Settings”
3. From the HR Settings page, click the wrench () icon next to “Staff Types Added”
4. In the box next to “Staff Grade/Post”, enter the staff position/grade
5. Click “Add Staff Type”

Add Fee Items

Fee items represent billable items that appear on student bills. This is required when *configuring fees*, and also when *preparing student bills*.

1. From the *welcome menu*, click on “Settings”
2. Next, click on “Finance Settings”
3. From the Finance Settings page, click the wrench () icon next to “Fees Items”
4. From the “Add Fee Items” pane, enter the name of the billable item in the box next to “Fee Item”

Tip: You can add multiple fee items at a go by clicking on the (+) icon

5. Click “Add”

Configure SMS


sERP provides several related features that allow you send SMS messages based on different conditions and criteria. The SMS module utilizes Darrel Technologies’ *SMS Gateway* for sending SMS, and in order to be able to use these features, you’d need to configure sERP to connect to the gateway.

Tip: Check out our *SMS Settings* section for more information


3.2 Settings & Configuration

sERP has many options which control how the software operates. This section details the setup and configuration options available.


3.2.1 General Settings

1. From the *welcome menu*, click on “Settings”
2. From the “General Settings” section, click on any wrench () icon on the right section of the page
3. Enter the following details:
 - **School Emblem:** Select and upload image file representing your school’s logo (*only JPEG files are supported, and image file should be under 400px*)
 - **School Name:** Enter your school name as you wish it to appear throughout the sERP, including on printed documents
 - **School SubName:** Whatever you enter here will appear on a different line next to your school’s name in smaller text in both on-screen and printed documents
 - **Motto:** Enter your school motto or slogan
 - **Email Address:** This is the default email address that will appear on all printed documents, and will also appear as the sender on all email correspondences
 - **Postal Address:** Enter your school P.O. Box or Ghana Post Digital address
 - **Phone Number(s):** Enter your school contact numbers. Multiple numbers may be entered, separated by a comma
 - **Tax Identification Number (TIN):** Enter your school tax identification number (TIN)
4. Click the “Save” button after entering the above information.

Student ID Prefix

1. From the general settings page, click the wrench () icon next to “Student ID Prefix”
2. In the “Student ID Prefix”, enter the value you wish to use as the student ID prefix
3. Click “Save”

Staff ID Prefix

1. From the general settings page, click the wrench () icon next to “Staff ID Prefix”
2. In the “Staff ID Prefix”, enter the value you wish to use as the staff ID prefix
3. Click “Save”


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3.2.2 Student Settings

1. From the *welcome menu*, click on “Settings”
2. Click on “Student Settings”

Scholarships

Displays the number of scholarships defined in the system. Click on the wrench icon () to view and manage scholarships.


Tip: Checkout our *Scholarships* guide for more information

Campuses

Displays the number of campuses defined in the system. Click on the wrench icon () to view and manage campuses.

Tip: Checkout our *Campuses* guide for more information

Dormitories

Displays the number of dormitories defined in the system. Click on the wrench icon () to view and manage dormitories.

Tip: Checkout our *Dormitories* guide for more information


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3.2.3 Academic Settings

1. From the *welcome menu*, click on “Settings”
2. Click on “Academic Settings”

Default Academic Calendar

From the Academic Settings section, click on the wrench () icon to the right of “Default Academic Year / Term”.

Setting the default calendar

1. From the “Update Default Academic Calendar” pane, select:
 - **Category:** the category (i.e. Trimester or Semester) you wish to set the default calendar for
 - **Default Calendar:** the academic calendar item from the list of created calendar entries


Tip: If no calendar entries exist, you would need to [create a new academic calendar entry](#)

2. Click “Save”

Adding a new calendar data entry


1. From the “Update Default Academic Calendar” pane, click on the “Manage Entries” button
2. From the “Add Academic Calendar Details” pane, enter the following:
 - **Academic Year:** select the academic year you wish to add a calendar entry for
 - **Label:** (optional) enter a name to identify the calendar entry. Defaults to “Default” if none is entered
 - **Category:** select the category (i.e. Trimester or Semester) this calendar entry applies to
 - **Term/Semester:** select the term/semester you wish to add a calendar entry for
 - **Begins:** select the start date for the term/semester
 - **Ends:** select the end date for the semester
3. Click “Save”

Divisions

This displays the number of divisions currently configured in sERP. Click on the wrench () icon to manage divisions.


Tip: Check out our [Divisions](#) guide for more information

Classes

This displays the number of classes currently configured in sERP. Click on the wrench () icon to manage classes.


Tip: Check out our [Classes](#) guide for more information

Subjects

This displays the number of subjects currently configured in sERP. Click on the wrench () icon to manage subjects.

Tip: Check out our [Subjects](#) guide for more information


Event Types

This displays the number of event types currently configured in sERP. Click on the wrench () icon to manage calendar.

Tip: Check out our [Events Calendar](#) guide for more information

SBA Configuration

SBA configuration determines the grading and comments criteria to be used in student performance assessments. At least one SBA configuration must be configured in order to use sERP, and each class has to be assigned an SBA configuration.

The SBA configuration section can be accessed from the academic settings page by clicking on the wrench icon () next to SBA Configuration.

Adding a new Configuration

1. From the “Existing Configurations” pane, click on “Add New SBA Configuration” (+)
2. Enter the following information:
 - **Configuration Name:** a value to identify the new configuration
 - **No. of Class Work Columns:** the number of classworks given as part of student assessment within a term/semester. sERP supports a minimum of 4 and maximum of 8 classworks
 - **Class A{N} Max. Score:** the maximum attainable marks for each classwork defined above
 - **Classwork Scale %:** the percentage value that the sum of all classworks will be scaled to
 - **Exam Scale %:** the percentage value that the total exam score will be scaled to for assessment
 - **Grade Type:** select the GES format for grading and remarks to be used with this SBA configuration
3. Click on “Submit”

Miscellaneous Settings


The following options can be toggled:

- **Display student photo on terminal report?:** whether or not to display students' photos on progress reports. This requires that a photo has been uploaded for the student.
- **Display attendance on terminal report?:** whether or not to display students' attendance on progress reports. Attendance will only be displayed if recorded using the *attendance module*.
- **Show student aggregate on terminal report?:** whether or not to display students' aggregate on progress reports. If set to yes, an entry box will be provided on student progress report to *record aggregate score*.
- **Show subject positions on terminal report?:** whether or not to display students' subject positions on progress reports
- **Show class/overall positions on terminal report?:** whether or not to display students' class position on terminal report

3.2.4 HR Settings


1. From the *welcome menu*, click on "Settings"
2. Click on "HR Settings"

Departments

This displays the number of departments currently configured in sERP. Click on the wrench () icon to manage departments.

Tip: Check out our *Departments* guide for more information


Staff Types

This displays the number of staff positions/designations currently configured in sERP. Click on the wrench () icon to manage staff positions/designations.

Adding a new staff type

1. From the "Add Staff Grade/Post", enter the staff position/designation in the box next to "Staff Grade/Post"
2. Click "Add Staff Type"

Income Tax Rates

Indicates whether or not tax rates have been configured. Tax rates are used in computing income tax (PAYE) as per Ghana Revenue Authority requirements. Click on the wrench () icon to manage income tax rates.

Viewing current tax rates

The “Current Tax rates” pane displays the tax rates as presently configured in sERP.


Updating tax rates

Income tax rates are periodically ammended and published on the GRA website: <https://gra.gov.gh/>

To update tax rates:

1. Obtain the “monthly” tax rates from the GRA website, for example: <https://gra.gov.gh/new-tax-rates-effective-1st-january-2020-2/>
2. Enter the “CHARGEABLE INCOME” (amount only) and “TAX RATES” into the boxes provided
3. Click “Save”


Employer’s File No./Social Security

Indicates whether or not the employer’s SSNIT number has been set. Click on the wrench () icon to manage.

To set the SSNIT number:

1. From the “Set File No. / Social Security” pane, enter your (school’s) SSNIT number in the box next to “File No. / Social Security”
2. Click “Save”


Employee Contribution Rate

Indicates whether or not the employee contribution rate has been set. This defaults to 5.5%, and typically wouldn’t need to be changed. Click on the wrench () icon to manage.

To set employee contribution rate:

1. From the “Set Employee Contribution Rate”, enter the contribution rate in the box next to “New Rate”
2. Click “Save”


SSNIT Remittance (1st Teir) Rate

Indicates whether or not the SSNIT contribution rate has been set. This defaults to 13.5%, and typically wouldn’t need to be changed. Click on the wrench () icon to manage.

To set SSNIT contribution rate:

1. From the “Set SSNIT Remittance Rate”, enter the contribution rate in the box next to “New Rate”
2. Click “Save”

Trustee Remittance (2nd Tier) Rate

Indicates whether or not the Trustee contribution rate has been set. This defaults to 5.5%, and typically wouldn't need to be changed. Click on the wrench () icon to manage.


To set Trustee contribution rate:

1. From the “Set Trustee Remittance (2nd Tier) Rate”, enter the following:
 - **Name Of Trustee:** name of your National Insurance Trust institution
 - **New Rate:** new value for Trustee contribution rate
2. Click “Save”

3.2.5 Finance Settings

1. From the *welcome menu*, click on “Settings”
2. Click on “Finance Settings”

Fee Items

Fee items basically represent the items listed on a student's bill, for which an amount will be billed based on the *configured fees* for that item. Click on the wrench () icon to manage billable items.


Adding a new fee item

1. From the “Add Fee Item” pane, enter the name of the item you wish to add

Tip: You can add multiple items at a go by clicking on the (+) icon

2. Click “Add”


Deleting a fee item

1. From the “Registered Fee Items” pane, click on delete () in the action column for the item
2. From the confirmation dialog box, click to confirm the deletion

<p>Warning: Deleting data is an irreversible process</p>

Fee Categories

sERP includes a feature that allows for segregated billing. By default, registered students are billed for all *fee items*; however, using fee categories, you can exempt certain groups of students from being billed (and consequently paying) for specific billable items.

Click on the wrench () icon to manage fee categories.

Adding a new fee category


From the “Add Category” pane:

1. Enter a name of the category in the box next to “Category Name”
2. Under “Fee Items”, select the applicable fee items for the fee category
3. Click “Add”

Note:

- Students assigned to a fee category would only ever be billed for the items you select here
- Students would explicitly have to be assigned to a fee category in order for their bills to be affected by it.

Deleting a fee category


1. From the “Registered Fee Items” pane, click on delete () in the action column for the item
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process

** Assigning a fee category to a student**

Fee categories can be assigned to a student either during student registration or by editing the student’s details after registration. See our [Student Registration](#) and [Student Details](#) guides for more information.

Billing Footnotes

Footnotes can be included on student’s bills for the purpose of conveying specific information to parents, for example: payment schedule, term/semester reopening dates, etc. Click on the wrench () icon to manage billing footnotes.

Adding footnotes

1. Enter up to 5 footnotes in the boxes provided next to “Footnote {N}”
2. Click “Save”


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3.2.6 SMS Settings

1. From the *welcome menu*, click on “Settings”
2. Click on “SMS Settings”
3. Here, you can setup the following:
 - **SMS API ID:** enter your D-Tech SMS API ID
 - **SMS API Key:** enter your D-Tech SMS API Key
 - **Send payment confirmation to parent?:** toggle to determine whether or not sERP sends payment notification to parent/guardian each time payment is applied to student bill
 - **Default Sender ID:** this is the default value that will appear as the sender of all automated SMS notifications. “SchoolERPGH” will be used as the sender ID if not specified

Setting the API ID and Key

1. Click the wrench () icon next to “API ID” as per above
2. Enter your API User ID and API in the relevant boxes provided
3. Click “Save”

Tip: Locating your SMS API details:

1. Create a D-Tech SMS account, if you haven’t already done so: <https://dtechghana.com/sms/app/signup>
 2. Log in to the SMS dashboard at <https://dtechghana.com/sms/app/login>
 3. From the navigation menu, go to “API” -> “API Access” to obtain User ID and API Key
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3.3 Troubleshooting

3.4 User Management

The following section provide information about creating and managing user accounts for staff with access to your sERP installation. Access roles and privileges make it possible to limit access to specific aspects of the system.

3.4.1 Adding a New User

1. From the *welcome menu*, click on “Manage Users”.
2. Click on “Add New User” (+)
3. Enter the following:
 - **User Type:** select the desired role for the user. In addition to creating logins for staff, user accounts and login credentials can also be created for students or parents/guardians, in order to be able to access the student and parent portals respectively.

Note: For staff:

- Select “Staff”
- In the box next to “Link User to Staff”, select the staff you wish to create an account for from the list of staff

For student:

- Select “Student” as the “User Type”
- In the box next to “Link User to Student ID”, enter the ID of the student you wish to create a user account for


For parent:

- Select “Guardian” as the “User Type”
 - In the box next to “Link User to Student(s)”, enter the IDs of the student whose parent or guardian you are creating a user account for. You can add multiple student IDs separate by a comma
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Tip: User roles have predefined permissions. Individual user permissions can subsequently be updated by *modifying the user’s details*.

- **Username:** enter a username for the user
 - **Password:** enter a password for the user
 - **Retype Password:** re-enter the user’s password
4. Click “Add User”

3.4.2 Modifying User Details

1. From the *welcome menu*, click on “Manage Users”.
2. Click on “Edit User” () in the “actions” column for the user you wish to modify
3. You can update user’s details from the “User Details” pane. You can also view and manage user system privileges from the “User Access Restriction” pane
4. Click “Modify User” to update user information

3.4.3 Deleting a User

1. From the *welcome menu*, click on “Manage Users”.
2. Click on “Delete User” (x) in the “actions” column for the user you wish to delete
3. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process
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3.4.4 Changing your Password

1. From the *welcome menu*, click on “Change Password”.
2. Type in a new password for your account into the “New Password” field.
3. Retype the same password in the “Retype Password” field.
4. Click “Change Password” to complete the change.

3.5 FAQs

3.6 USSD Bill Payment

sERP’s USSD bill payment platform simplifies school fees collection by enabling parents/guardians pay for their wards’ bills via mobile money across all supported networks in Ghana. Payments are reconciled in real-time, and confirmation will be sent out to parents via SMS (if enabled).

The USSD bill payment platform is offered in partnership with Ghanaian Fintech and payment service provider **Emergent Payments**, and is available via ***789*87#** on all networks in Ghana.

To avail of this solution, your school would first need to be profiled and onboarded onto the **Interpay** payment gateway operated by Emergent Payments, after which a unique code will be generated for your school for use on the platform. Your school’s unique code can be found within your *sERP settings*.

3.7 Using sERP

3.8 Academic Module

This section of our guide covers the various tools and features available in sERP for managing academics related data; from general academic information, to student performance assessment.

3.8.1 Classes

This section allows you manage all information related to your school's classes in sERP. The classes section can be accessed from the *main navigation menu* by going to Academic -> Classes.

Add Class

1. Click the drop down arrow (▼) in the “Add Class” pane to reveal the form options
2. From the “Add Class” pane, enter the following:

Note:

- **Academic Calendar:** select the academic calendar category for the class
 - **Class Name:** enter the name of the class as you'd like it to appear
 - **Campus:** select the campus/location where this class belongs
 - **Division:** select the division this class belongs
 - **Class Teacher:** select and assign a class teacher for this class. *(This requires a user account to have been created, and assigned to a staff in sERP)*
 - **Class Code:** enter a code for this class. *(This is required for [student ID generation](#))*
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Tip: You can add multiple classes at a go by clicking on the drop down arrow (▼) in the “Quick Add Class(es)” pane

3. Click on “Add Class”

View Class Summary & Roster

From the “Existing Class List” pane, locate and click on the name of the class to display the class summary and list of students enrolled in that class. You may also export the student list.

Modifying Class Data

1. From the “Existing Class List” pane, click on edit class () in the “Action” column for the class
2. Modify the following:


Note:

- **Class Name:** enter the name of the class as you'd like it to appear
- **Class Code:** enter a code for this class *(This is required for [student ID generation](#))*. Changes have no effect on existing student ID
- **Academic Calendar:** select the academic calendar category for the class
- **Campus:** select the campus/location where this class belongs
- **Group:** select the class group to add this class to

- **SBA Configuration:** specify the *SBA configuration* to be used for this class
 - **SBA Assign. Staff:** select a list of staff/teachers who can record marks for student assessment in this class
 - **Attendance Assign. Staff:** select a list of staff/teachers who can record attendance for this class
 - **Canteen Payment Assign. Staff:** select a list of staff/teachers who can record attendance payments for this class
 - **Division:** select the division this class belongs
 - **Class Teacher:** select and assign a class teacher for this class. (*This requires a user account to have been created, and assigned to a staff in sERP*)
 - **Class Prefect:** select and assign class prefect for this class from roster
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3. Click “Save”

Delete Class

1. From the “Existing Class List” pane, click on “Delete Class” () in the “Action” column for the class
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process
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3.8.2 Class Groups

Class Groups in sERP allow you combine various classes into one unit. For example, a school with classes JHS 1A, JHS 1B and JHS 1C may choose to have a class group named “JHS”, which includes all of these different classes. This enables you search and list students in a particular group, as well as prepare *combined progress reports* for that unit.

The class groups section can be accessed from the *main navigation menu* by going to Academic -> Class Groups.


Adding a class group

1. From the “Add Group” pane, enter the name of class group next to “Class Group Name”

Tip: You can add multiple class groups at a go by clicking on the (+) icon

3. Click on “Add Group/s”

Deleting a class group

1. From the “Added Class Groups” pane, click on delete () in the “Action” column for the class group
2. From the confirmation dialog box, click to confirm the deletion

Note: You may only delete a class that doesn’t have any classes assigned to it

Warning: Deleting data is an irreversible process

3.8.3 Subjects

Subjects can be managed from the *main navigation menu* by going to Academic -> Subjects.


Adding subjects

From the “Quick Add” pane:

1. Enter the name of the subject in the box next to “Subject Name”
2. Enter the subject code in the box next to “Code”

Tip: You can add multiple subjects at a go by clicking on the (+) icon

Modifying a subject

1. From the “Subjects” pane, click on edit () in the “Action” column for the subject
2. Enter the following:
 - **Subject Name:** the name of the subject as it should appear in sERP and on relevant documents
 - **Subject Code:** a shortened code for the subject
 - **SBA Assign. Staff:** select staff who should have access to record SBA marks for this subject
3. Click on “Save”

Deleting a subject

1. From the “Subjects” pane, click on delete () in the “Action” column for the subject
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process

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3.8.4 Divisions

From the *main navigation menu*, go to Academic -> Divisions

Adding a new division

1. From the “Add Division” pane, enter the name of division next to “Division Name”

Tip: You can add multiple divisions at a go by clicking on the (+) icon

2. Click on “Add Division/s”

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3.8.5 Calendar

The calendar section (not to be confused with the *Academic Calendar Setting*) enables you to record upcoming events. sERP can provide alerts and reminders for events to help keep you up to speed.

The calendar section can be accessed from the *main navigation menu* by going to Academic -> Calendar


Adding Event Types

1. Click the drop down arrow () in the “Add Event Type” pane to reveal the form options
2. Enter the event type in the box next to “Event Type”
3. Click “Add Event Type”


Adding an Event

1. From the “Add Event” pane, enter the following information:
 - **Event Type:** select the type of event from the list of added event types
 - **Event Name:** enter a name for the event
 - **Description:** optionally, enter a description for the event
 - **Start Date:** enter a start date for the event
 - **End Date:** enter an end date for the event
2. Click “Add Event”

Modifying an event

1. From the “Events” pane, click on edit () in the “Action” column for the event
2. Enter the new values for the requested information above
3. Click on “Save Event”

Deleting an event

1. From the “Events” pane, click on delete () in the “Action” column for the event
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process

3.8.6 Notes

sERP enables authorized staff draft notes and upload files, which can later be viewed/downloaded by students or parents via their respective portals.

The notes section can be accessed from the [main navigation menu](#) by going to Academic -> Notes.

Adding a note

1. From the “Add Note” pane, supply the following information:
 - **Class:** select the class which the note is being added for. Only students and parents of students in this class can view the note
 - **Subject:** select the applicable subject for the note
 - **Topic:** a topic for the note for easy identification
 - **Notes:** enter the text for your note

- **Attach Document:** select Word, Excel, PDF or txt file to be added to the note

2. Click “Add Notes”

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3.8.7 Year Groups

Create and manage groupings for various outgoing sets/batches. Year groups are particularly useful for retrieving information pertaining to past students, but can also be used in other areas within the sERP ecosystem.

The year groups section can be accessed from the *main navigation menu* by going to Academic -> Year Groups.


Adding a year group

1. From the “Add Group” pane, enter the name of year group next to “Year Group Name”

Tip: You can add multiple year groups at a go by clicking on the (+) icon

3. Click on “Add Group/s”

Deleting a year group

1. From the “Added Year Groups” pane, click on delete () in the “Action” column for the year group
2. From the confirmation dialog box, click to confirm the deletion

<p>Warning: Deleting data is an irreversible process</p>

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3.8.8 SBA

This section enables authorized users record student assessment for their respective classes. The SBA section can be accessed from the *main navigation menu* by going to Academic -> SBA.

Note:

- SBA Configuration data is required to be able to record assessment. Each class would've had to have been assigned a SBA configuration. See our *Modifying Class Data* guide for more information
 - Staff would need to have been assigned to both the class and subject in order to be able to record assessment for either. See our *Modifying Class Data* and *Modifying a subject* guides for more information
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Recording Student Assessment

1. Select the following information:
 - **Class:** the class you are recording SBA for
 - **Subject:** the subject you are recording SBA for
 - **Academic Year:** the academic year you are recording SBA for
 - **Term/Semester:** depending on class, the term or semester you are recording SBA for
2. Click on “Load” to retrieve list of students in the selected class
3. From the “Continuous Assessment” pane, perform the following for each listed student:
 - From the “Class Work” column, enter the marks obtained by the student for each class work (A1, A2, A3, etc) in the respective boxes provided
 - Enter the marks obtained by the student in the final examination in the box under “Exam Score 100%”
 - Click on the compute () link to scale marks and calculate the student’s total score
4. Once all students have been assessed, click on “Save Report” to save/update

3.8.9 Progress Reports

This section prepares academic reports for each students at the end of each term/semester. The progress reports section can be accessed from the [main navigation menu](#) by going to Academic -> Progress Reports.

Generating Reports

1. Select the following report criteria:
 - **Show:** select whether to generate report for single student or entire class
 - **Class:** if class is selected above, select the class you wish to generate report for
 - **Student:** if student is selected above, enter the *Student ID* of the student you wish to generate report for
 - **Academic Year:** select the academic year you wish to generate report for
 - **Term/Semester:** select term/semester you wish to generate report for
2. Click “List Students”
3. From the “Students” pane, select the student(s) you wish to generate report for by checking the box next to the students name

Note: Only students who have marks entered for the selected academic year and term/semester will be listed

4. Click “Generate Report” to generate/view printable progress report for the selected student(s), or “Go to SMS” to send report via SMS instead

Recording Report Data

Once a progress report has been generated, you may enter the following information for each student report:

- **PROMOTED TO/REPEATED IN:** the class the student will be in for the next academic term/semester
- **ATTENDANCE:** student attendance for the term/semester under assessment. sERP automatically populates this field if *student attendance* has been recorded
- **NEXT SEMESTER BEGINS:** the reopening date for next term/semester. sERP automatically populates this field if *academic calendar* entry exists for the coming term/semester
- **AGGREGATE:** the students aggregate score for the term/semester
- **STUDENT'S CONDUCT**
- **STUDENT'S INTERESTS**
- **CLASS TEACHER'S/FORM MASTER'S REMARKS**
- **HOUSE MASTER'S/MISTRESS' REMARKS**
- **HEAD MASTER'S REMARKS**

Click on “Save Report” to update the information entered, or “Print” to print out the report.

HEADMASTER'S SIGNATURE: a dotted line is provided on generated reports for headmaster's signature. sERP automatically appends the image for the *headmaster's signature* if uploaded

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3.8.10 Combined Progress Reports

Progress reports can also be prepared for *class groups* using the combined progress reports section. This section can be accessed from the *main navigation menu* by going to Academic -> Combined Reports.

Generating Combined Reports

Select the following:

- **Group:** the *class group* you wish to generate the report for
- **Academic Year:** select the academic year you wish to generate report for
- **Term/Semester:** select term/semester you wish to generate report for

2. Click “List Students”

3. From the “Students” pane, select the student(s) you wish to generate report for by checking the box next to the students name

Note: Only students who have marks entered for the selected academic year and term/semester will be listed

4. Click “Generate Report” to generate/view printable progress report for the selected student(s), or “Go to SMS” to send report via SMS instead

3.8.11 Correspondence


This section enables you to create and track outgoing letters using an automatically generated “ref”. All letters are appended to a letter head which is automatically generated and formatted by sERP.

The correspondence section can be accessed from the *main navigation menu* by going to Academic -> Correspondence.


Drafting a Correspondence

1. Click the drop down arrow (▼) in the “Add Correspondence” pane to reveal the form options
2. Enter the following:
 - **Address:** address of the addressee (recipient) of the letter
 - **Salutation:** salutation as you wish for it to appear on the letter
 - **Subject:** the subject of the letter
 - **Body:** the introduction and content of the letter
 - **Closing:** complementary close
 - **Signature:** name or designation
 - **Date:** select the correspondence date
3. Click “Add Correspondence”


Viewing and printing a Correspondence

1. From the “Previous Correspondences” pane, click on “View Correspondence” (ⓘ)
2. Click on “Print Correspondence” ()

Modifying a Correspondence

1. From the “Previous Correspondences” pane, click on “Edit Correspondence” ()
2. Review and update the information in step 2 of *Drafting a Correspondence* above
3. Click “Submit”

Deleting a Correspondence

1. From the “Previous Correspondences” pane, click on “Delete Correspondence” ()
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process
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3.9 Canteen Module

3.10 Finance Module

The following sections provides information surrounding the management of financial aspects of sERP.

3.10.1 Fees Configuration

sERP offers various options for configuring and managing fees. Fees can be configured for individual students, one or more classes; based on student status and per *billable item*.

1. From the *main navigation menu*, go to Finance -> Set Fees
2. Select the Academic Year and Term/Semester from the respective drop-down menus
3. Click on “Submit”

Once the term/semester and academic year have been specified, you can then go ahead to configure fees from the “Set Fees” pane as follows:

1. Select criteria

Settings fees by class

- Select option “One or more classes” from the drop-down menu next to “Set fees for”
- From the drop-down menu next to “Class(se)”, check the classes you wish to configure fees for
- Select the student status from the drop-down menu next to “Status”. You may also select “All Students” to configure fees for all status types

Set fees by individual student

You can set fees for an individual student which is different from fees set for the rest of the class.

- Select option “Individual Student” from the drop-down menu next to “Set fees for”
 - From the drop-down menu next to “Student’s Class”, select the class the student is enrolled in
 - From the drop-down menu next to “Student”, select the student
2. Select a billable item from the drop-down menu next to “Fee Item” to configure fees for that item
 3. Specify the fee amount for that item
 4. Click “Set Fees”


Tip: The above steps need to be performed for each billable item

Deleting set fees

For Individual Items

1. From the “Current Fees” pane, click on delete (X) next to the item you wish to remove fees for
2. Confirm deletion of fees

For Entire Class

1. From the “Current Fees” pane, click on “clear set fees for this class” () from the “Actions” column for the class
2. Confirm deletion of fees

Note: It isn’t advisable to delete set fees if payment has been recorded against the item(s), as this has an effect on student’s bill and payment history.

Warning: Deleting data is an irreversible process

3.10.2 Student Billing

This section covers information about billing management. sERP provides robust and flexible tools for preparing, updating and organizing students’ bills. The billing management section can be accessed from the [main navigation menu](#) by going to Finance -> Prepare Bill.

1. Select billing criteria

Billing entire class

- Select option “By Class” from the drop-down menu next to “Show”
- Select the class you wish to prepare bill for from the drop-down menu next to “Class”
- Select the student status from the drop-down menu next to “Status”. You may also select “All Students” to configure fees for all status types

Billing individual student

- Select option “By Student” from the drop-down menu next to “Show”
 - Enter the ID of the student you wish to prepare a bill for in the box next to “Student ID”
2. Select Academic Year and Term/Semester from the relevant drop-down menu
 3. Click “Submit”

Hint: sERP updates and populates the academic calendar period based on the selected class

4. From the “Bill Summary” pane, do one of the following:
 - Click on “Bill Student” from the “Actions” column for the student to prepare/update that student’s bill, OR
 - Select one or more students by checking the check box for the student(s) and click “Generate/Update Bills”

Adding Custom Bills

sERP allows you to add up to three (3) extra items to a student’s bill, in addition to predefined *billable items*. This is particularly useful in a scenario where it is required to bill a student for an item that typically wouldn’t be added to a student’s bill.

Note:

1. *Fees* would have had to have been set for a class in order to be able to prepare bill for students in that class
 2. Each time any changes are made to the price of billable items, or student financial status, bills would have to be re-prepared/updated in order for student bill to reflect the changes
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3.10.3 Payments

This section covers information about capturing payments. sERP allows for recording and generating receipts two (2) kinds of payments, namely:

- **Bill payments:** payments against bills that have previously been prepared in sERP
- **Non-bill payments:** payments received for items that haven’t necessarily been billed

Bill payments

1. From the *main navigation menu*, go to Finance -> Bill Payment
2. Select the following:
 - **Class:** the class in which the student you are recording payment for is enrolled
 - **Academic Year:** the academic year for which the payment was made
 - **Term/Semester:** the academic term for which the payment was made
 - **Student:** select the student you are recording payment for from the class register
3. Click “Load” to display payment options and retrieve student’s financial records, which will be displayed in “Student Bill Summary” pane
4. Enter the following:
 - **Amount:** the amount received from the student
 - **Date paid:** the date in which the payment was made. Defaults to current date
 - **Apply to Bill Item(s):** you may specify whether to apply payment to specific items, or simply select “Select All” to have sERP distribute the received amount to billed items automatically
 - **Payment Type:** the mode of payment
 - **Remarks:** enter a description for the payment being recorded
5. Click “Record Payment”
6. From the payment recorded confirmation page, click on “Generate Receipt” to prepare receipt for the payment

Non-bill Payments

1. From the *main navigation menu*, go to Finance -> Non-bill Payment
 2. Select the following:
 - **Class:** the class in which the student you are recording payment for is enrolled
 - **Academic Year:** the academic year for which the payment was made
 - **Term/Semester:** the academic term for which the payment was made
 - **Student:** select the student you are recording payment for from the class register
 3. Click “Load” to display payment options
 4. Enter the following:
 - **Amount:** the amount received from the student
 - **Date paid:** the date in which the payment was made. Defaults to current date
 - **Payment Type:** the mode of payment
 - **Remarks:** enter a description for the payment being recorded
 5. Click “Record Payment”
 6. From the payment recorded confirmation page, click on “Generate Receipt” to prepare receipt for the payment
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3.10.4 Tracking and Managing Payments

sERP offers detailed and payment reporting. This sections covers how to obtain information about payments captured in sERP.

Viewing recent payments

From the [main navigation menu](#), go to Finance -> View Payments. The “Fees Payments” pane displays a table showing the last 100 payments recorded in sERP, with the following information:

- Payment date
- Student details
- Amount paid
- Receipt number
- Academic year
- Term/Semester
- Paid to: details of staff who recorded the payment
- Date and time recorded
- Actions: view receipt, cancel payment and view payment history

Filtering payments

1. Select filtering criteria (date or receipt number) from the drop-down menu next to “Filter By”
2. Enter date range or receipt no depending on selected criteria
3. Click “List Payments”

Intelligent search

The “Fees Payment” pane provides an intelligent search box which can be used to filter payment results. Simply type the receipt number, student name/ID, date or any other criteria into the box next to “Search” to locate the item quicker.


Payment reports

sERP’s payment reporting module offers even more comprehensive payment reporting and analytics, including additional search filters and options.

Hint: Checkout our [payment reports](#) guide for more information

Viewing payment receipts

From the “Fees Payment” pane:

- Click on the receipt number from the “Receipt No” column for the payment whose receipt you wish to view OR
- Click on “View Receipt” () from the actions column for the payment whose receipt you wish to view

Cancelling a payment

Admin and other authorized users may cancel a payment. To cancel a payment:

1. From the “Fees Payment” pane, click on “Cancel Payment” (X) from the “Actions column for the payment you wish to cancel
2. Review the payment details to verify
3. In the box beneath “Reason for cancelling Payment”, enter the reason why you wish to cancel the payment
4. Click “Cancel Payment”

3.10.5 Debtors List

This section provides information about using sERP’s debtors list feature, which enables you track all fee debtors.

1. From the *main navigation menu*, go to Finance -> Debtors List
2. Select the following:
 - **Academic Year:** academic year for which you wish to view debtors
 - **Term/Semester:** academic term/semester for which you wish to view debtors
 - **List By:** optionally, select criteria for which you want to query debtors:
 - By Class: select the class you wish to view report for
 - By Campus: select the campus you wish to restrict report to
 - **Filter By:** optionally, select report filters:
 - Amount paid: specify amount and criteria
 - Percentage paid: specify percentage and criteria
 - **Past Students:** optionally, select whether to include or exclude past students from the list, or only show past students
 - **Withdrawn Students:** optionally, select whether to include or exclude withdrawn students from the list, or only show withdrawn students
3. Click “List Debtors”

3.10.6 Bill Reminders

Bill reminders enable you communicate to parents whose wards are owing fees by sending payment reminders. Reminders can be sent either via SMS or print. The bill reminder feature can be accessed from the *main navigation menu* by going to Finance -> Bill Reminder.

1. Select the following:
 - **Academic Year:** academic year for which you wish to view debtors
 - **Term/Semester:** academic term/semester for which you wish to view debtors
 - **List Debtors By:** optionally, select criteria for which you want to query debtors:
 - By Class: select the class you wish to view report for
 - By Campus: select the campus you wish to restrict report to
 - **Filter By:** optionally, select report filters:
 - Amount paid: specify amount and criteria
 - Percentage paid: specify percentage and criteria
2. Click on “List Debtors” to generate/view debtor’s list
3. From the “Debtors” pane, select the student(s) whom you wish to send a reminder, by checking the respective check box
4. Click one of the following buttons:
 - **Continue:** draft and print payment reminder
 - **Send SMS Instead:** draft and send personalized payment reminder using the SMS module

Hint: Checkout our *SMS Bill Reminder guide* for more information

3.10.7 Income and Expenditure


This feature provides a summary of accrued income (payments plus supplementary income) and expenditure incurred by your school. It also provides tools for recording expenditure and supplementary income (i.e. income received from alternative sources other than school fees and non-billed payments).

The income and expenditure feature can be accessed from the *main navigation menu* by going to Finance -> Income & Expenditure.


Balance

This displays the current cash balance - essentially the difference between income and expenditure.

Adding Supplementary Income

1. From the “Income Breakdown” pane, click on “View/Add Supplementary Income” ()
2. Enter the following:
 - Payment date
 - Amount
 - Description for the payment
3. Click “Record Income”

Viewing and Recording Expenditure

From the “Expenditure Breakdown” pane, click on “View/Record Expenditure” () to access the expenditure management section.

Viewing Expenditure

The “Expenditure History” pane displays the expenditure table, which displays a list of recorded expenditure under the following headings:

- Date
- Description
- Amount
- Payment Type

Recording Expenditure

1. From the “Record Expenditure” pane, enter the following information:
 - Date
 - Amount
 - Expenditure Category
 - Payment Type
 - Expenditure Description
2. Click “Record Expenditure”

Hint: sERP offers detailed reporting on both payments and expenditure. See our *Finance Reports* guide for more information

3.11 HR Module

3.11.1 Departments

3.12 Reports Module

3.12.1 Attendance

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3.12.2 Finance

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Payments

3.13 SMS Module

3.13.1 Bill Reminder

3.14 Students Module

Student information management is a large part of what the sERP software does, and thus this section of the guide provides information on managing the various aspects of sERP related to student bio data and attendance.

The Students module can be accessed from the *main navigation menu*, and contains the following sub modules:

3.14.1 Student List

This section enables you query sERP for student information based on mutiple criteria. To begin, select one of the following from the drop-down menu next to “Criteria”:

- **All:** generate a list of all students currently registered
- **Name:** search for individual student by name. Enter part or all of the student’s name in the box next to “Name”
- **Student ID:** search for individual student by student ID. Enter student’s ID in the box next to “Student ID”
- **Gender:** generate a list of currently registered students, based on gender
- **Status:** generate a list of students based on status. Select status from drop-down menu next to “Status”
- **Class/Year Group:** generate a list of students currently enrolled in a particular class, or past students from a year group. Select class or year group from drop-down menu next to “Class/Year Group”
- **Section:** generate a list of students based on section. Select section from drop-down menu next to “Section”
- **Campus:** generate a list of students registered in a particular campus. Select campus from drop-down menu next to “Campus”
- **Division:** generate a list of students registered in a particular division. Select division from drop-down menu next to “Division”

- **Dormitory:** generate a list of students registered in a particular dormitory. Select dormitory from drop-down menu next to “Dormitory”
- **Scholarship:** generate a list of students on a given scholarship


Student List Table

Search results are displayed in the following format:

Student ID	Name	Gender	Status	Class	Actions
Student sERP ID	Student full name and link to student details	Student’s gender	Student Status	Student class and link to class details	Actions: view, edit, withdraw or delete

Student Details

Viewing Students Details

From the “Students” pane in the search results, click on the students name or simply click on “View Student’s Details” () from the “Actions” column for that student.


Note: Student data is presented in the following sections for easy identification:

- **Students Information:** general student information, including: student ID, full name, gender, status, date of birth, etc
- **** Guardian’s Information**:** name, contact and other information pertaining to student’s parent/guardian
- **Other Information:** specialized information such as scholarships, fees category, last school attended, and reason for leaving last school
- **Documents:** allows for uploading documents related to student. Accepted formats are: jpg, jpeg, png, pdf, doc, docx, xls, and xlsx
- **Additional Information:** allows for adding of extra information which may not ordinarily be captured by sERP

It is also possible to view student-specific academic and financial information such as progress reports, student bill and fees payment history.


Modifying Student Details

You may update information relating to students registered in sERP at anytime. To modify student details:


1. From the “Students” pane in the search results, click on “Edit Student’s Details” () from the “Actions” column for that student. Or, click on “Edit Details” from the student details page
2. Alter the required information in the relevant section
3. Click “Update Student”

Withdrawing a Student

When a student is withdrawn, the student is added to the list of *withdrawn students*, and will no longer be part of enrolled students in their class. However, the students data remains intact and can subsequently be re-admitted, if required. To withdraw a student:

1. From the “Students” pane in the search results, click on “Withdraw Student” () from the “Actions” column for that student
2. Confirm student withdrawal from the dialog box

Deleting a student

1. From the “Students” pane in the search results, click on “Delete Student” () from the “Actions” column for that student
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process
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3.14.2 Student Registration

This section provides an interface for adding student information into the sERP system. The student registration section can be accessed from the *main navigation menu* by going to Students -> New Registration.

1. Complete the following sections:

Personal Details

Captures general student information and bio data including:

- Surname
- First name
- Other names
- Date of Birth
- Place of birth
- Gender
- Nationality
- Religion

Academic Details

Captures information pertaining to the student's relationship with the school, as well as other 'academic-specific' information, including:

- Student ID

Hint: sERP provides the option to automatically generate student ID based on configured ID criteria. Alternatively, you may manually enter the student ID

- Date of registration
- *Class*
- *Section*
- Status
- *Scholarship*
- *Fee Category*
- Last school attended
- Reason for leaving last school

Contacts

Captures student contact information:

- Mobile number
- Phone number
- Area of residence
- Current address
- Postal address

Parents

Captures student's parents' details, including:

- Full name
- Mobile number
- Address
- Email address
- Occupation

Photo

Upload image to be used as student photo ID

2. Click on “Add Student”

Tip: If an error is produced during registration, you might need to clear your browser cache and reload the page and try again: <https://kb.iu.edu/d/ahic>

3.14.3 Past Students

This section contains information about alumni, and is generally categorized into *year groups*. The past students section can be accessed from the *main navigation menu* by going to Students -> Past Students.

1. Select search criteria:
 - **All:** show all past students
 - **Year Group:** show past students from specific alumni *year group*
2. Click “List Students”

Available actions

The following actions can be performed for past students:

- **View Student Details:** sERP retains student data even after completion
- **Edit Student Details:** allows authorized personnel to modify past student information
- **Record Bill Payment:** sERP allows for collecting arrears owed by students even after they may have left the school
- **Delete Student:** completely remove student records from sERP

3.14.4 Withdrawn Students

This section contains information about students who have left the school but did not complete their programme. The withdrawn students section can be accessed from the *main navigation menu* by going to Students -> Withdrawn Students.

1. Select search criteria:
 - **All:** show all withdrawn students
 - **Date Withdrawn:** show withdrawn based on withdrawal date. This option allows you to specify a date range for the search
2. Click “List Students”

Available actions

The following actions can be performed for past students:

- **View Student Details:** sERP retains student data even after completion
- **Edit Student Details:** allows authorized personnel to modify past student information
- **Re-admit student:** allows authorized personnel to re-enroll student into active students list, without having to re-enter their registration information
- **Delete Student:** completely remove student records from sERP

3.14.5 Attendance

The attendance section enables authorized personnel record daily student attendance. Attendance data can subsequently be viewed from the *reports*. Attendance data is also included in student *progress reports*.

The attendance section can be accessed from the *main navigation menu* by going to Students -> Attendance.

1. Select the class you wish to record attendance for from the drop down menu next to “Select Class”
2. Select the date you wish to record attendance for
3. Click on “List Students”
4. From the resulting class register, check the box in the column labelled “Present” for each student. If student is absent, simply leave the box unchecked.
5. Click “Record Attendance”

3.14.6 Sections

This section allows for managing sections. It can be accessed from the *main navigation menu* by going to Students -> Sections.


Adding Sections

1. From the “Add Section” pane, enter the name of section next to “Section Name”


Tip: You can add multiple sections at once by clicking on the (+) icon

2. Click on “Add Section/s”

Modifying Section Data

1. From the “Sections” pane, click on “Edit Section” ()
2. Enter the new name of the section in the box next to “Section Name”
3. Click “Modify Section”

Delete Section

1. From the “Sections” pane, click on “Delete Section” ()
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process

3.14.7 Campuses

The campuses section of the student module provides interfaces that allow you add, modify and/or delete campus/location data. It can be accessed from the [main navigation menu](#) by going to Students -> Campuses.


Adding Campus/es

1. From the “Add Campus” pane, enter the name of campus next to “Campus Name”


Tip: You can add multiple campuses at once by clicking on the (+) icon

2. Click on “Add Campus/es”

Modifying Campus Data

1. From the “Campuses” pane, click on “Edit Campus” ()
2. **Here you can:**
 - Enter the name of the campus in the box next to “Campus Name”,
 - In the box next to “Headmaster’s Signature”, select a JPEG image for the headmaster’s signature, which will appear on student *progress reports*.
3. Click “Modify Campus”

Delete Campus

1. From the “Campuses” pane, click on “Delete Campus” ()
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process

3.14.8 Dormitories

This section allows for managing student dormitories. It can be accessed from the *main navigation menu* by going to Students -> Dormitories.


Adding Dormitories

1. From the “Add Dormitory” pane, enter the name of dormitory next to “Dormitory Name”


Tip: You can add multiple dormitories at once by clicking on the (+) icon

2. Click on “Add Dormitory/ies”

Modifying Dormitory Data

1. From the “Dormitories” pane, click on “Edit Dormitory” ()
2. Enter the new name of the dormitory in the box next to “Dormitory Name”
3. Click “Modify Dormitory”

Delete Dormitory

1. From the “Dormitories” pane, click on “Delete dormitory” ()
2. From the confirmation dialog box, click to confirm the deletion

<p>Warning: Deleting data is an irreversible process</p>

3.14.9 Promotions

The promotion section offers a flexible and easy way to move students from one class to another. This is particularly useful for handling bulk promotions at the end of each academic term/semester. The promotion section can be accessed from the *main navigation menu* by going to Students -> Promotions.

From the “Promote Students” pane:

1. Select the class from which you would like to promote students, from the drop down menu next to “Class”
2. From the drop menu next to “Student”, check the box next to each student in the selected class you wish to promote. Alternatively, simply check the box next to “Select All” to promote all students in the class.
3. From the drop down menu next to “Move To”, you can select from the following:
 - **Past Students:** select this option to move student(s) to alumni *year group*. You’d then need to specify which year group to move the student(s) to from the drop down menu next to “Year Group”
 - **Withdrawn List:** select this option to add selected student(s) to the list of *withdrawn students*
 - You may also move the selected student(s) to a new class by simply selecting the new class you wish to move the student(s) to

4. Click “Save”


Warning: You must only promote students to a new class after SBA marks have been entered and reports validated for the current academic period.

3.14.10 Prefects

This section allows you to appoint students to prefectorial positions. The prefects section can be accessed from the *main navigation menu* by going to Students -> Prefects.

1. Enter the ID of the student you wish to appoint prefect in the box next to “Student ID”
2. Enter the prefectorial position you wish to appoint the student to in the box next to “Position”
3. Click “Save”

Updating prefectorial position

1. From the “Prefects” pane, click on “Modify Position” () next to the prefect
2. Enter the new position
3. Click “Save”

3.14.11 Scholarships

This section allows you to define and manage scholarships. Scholarships provide a way of waiving all or partial fees for selected students. The scholarship section can be accessed from the *main navigation menu* by going to Students -> Scholarships.


Creating a new scholarship

From the “Add Scholarship” pane:


1. Enter a name for the new scholarship in the box next to “Scholarship Name”
2. Specify a percentage value between 1-100 in the box next to “Percentage”
3. Check the box next to each billable item you would like the scholarship to be applied to next to “Fee Items Affected”. You may select all items by checking the box next to “Select All”
4. Click on “Add Scholarship”

Note: When a student is assigned to a scholarship, the items on the student’s bill will be discounted by the total amount representing the percentage value defined for that scholarship

Modifying a scholarship

1. From the “Existing Scholarships” pane, click on “Edit Scholarship” () from the “Actions” column for the scholarship
2. Update the following:
 - Scholarship Name
 - Percentage
 - Fee Item Affected
3. Click on “Modify Scholarship”

Deleting a scholarship

1. From the “Existing Scholarships” pane, click on “Delete scholarship” ()
2. From the confirmation dialog box, click to confirm the deletion

Warning: Deleting data is an irreversible process
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