

openSIS Quick Setup Guide

Last updated: October 2008

openSIS Setup Guide

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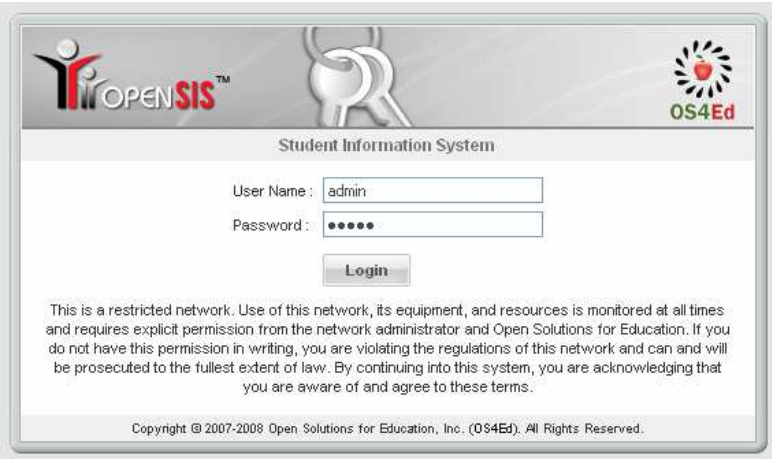
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This instruction manual will guide you through the configuration process to set up a fully-functional openSIS. This guide assumes that you have installed and configured the required software components for openSIS:

- Apache HTTP Server Version 2.x or greater
- PHP Version 5.x or greater
- PostgreSQL Database – Version 8.2.x or prior (openSIS is not compatible with Version 8.3)

1. The login screen:

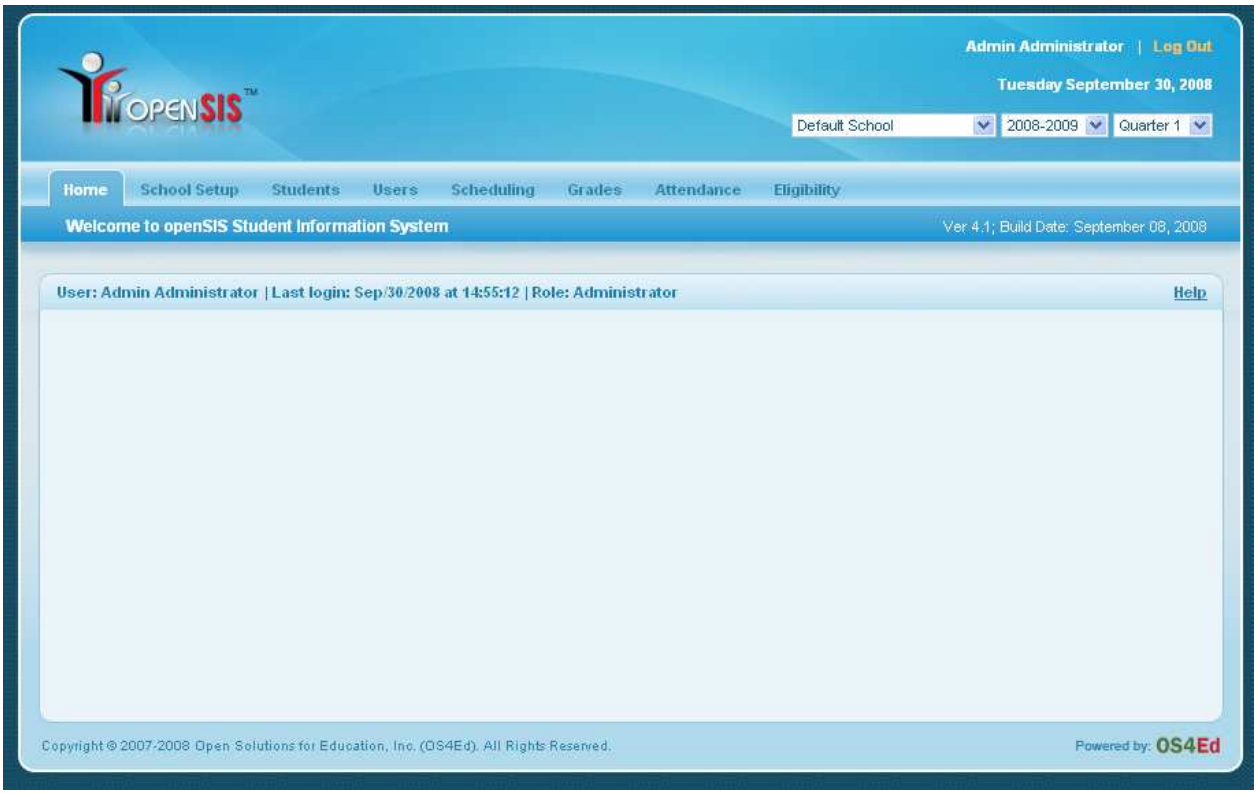
Once you have installed openSIS, please login to the application using the administrative username and password you provided during installation. If you have not installed openSIS yet, please refer to the openSIS installation manual that came with the software.



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2. The Dashboard:

The Dashboard is your default home page and provides access to important alerts whenever a user logs in to the application. The openSIS dashboard shows all recent calendar event information, portal notes and alerts for teachers that have missing attendance. When you login for the first time it will be a blank screen. It will fill up as and when you add day-today records in your instance of the application.



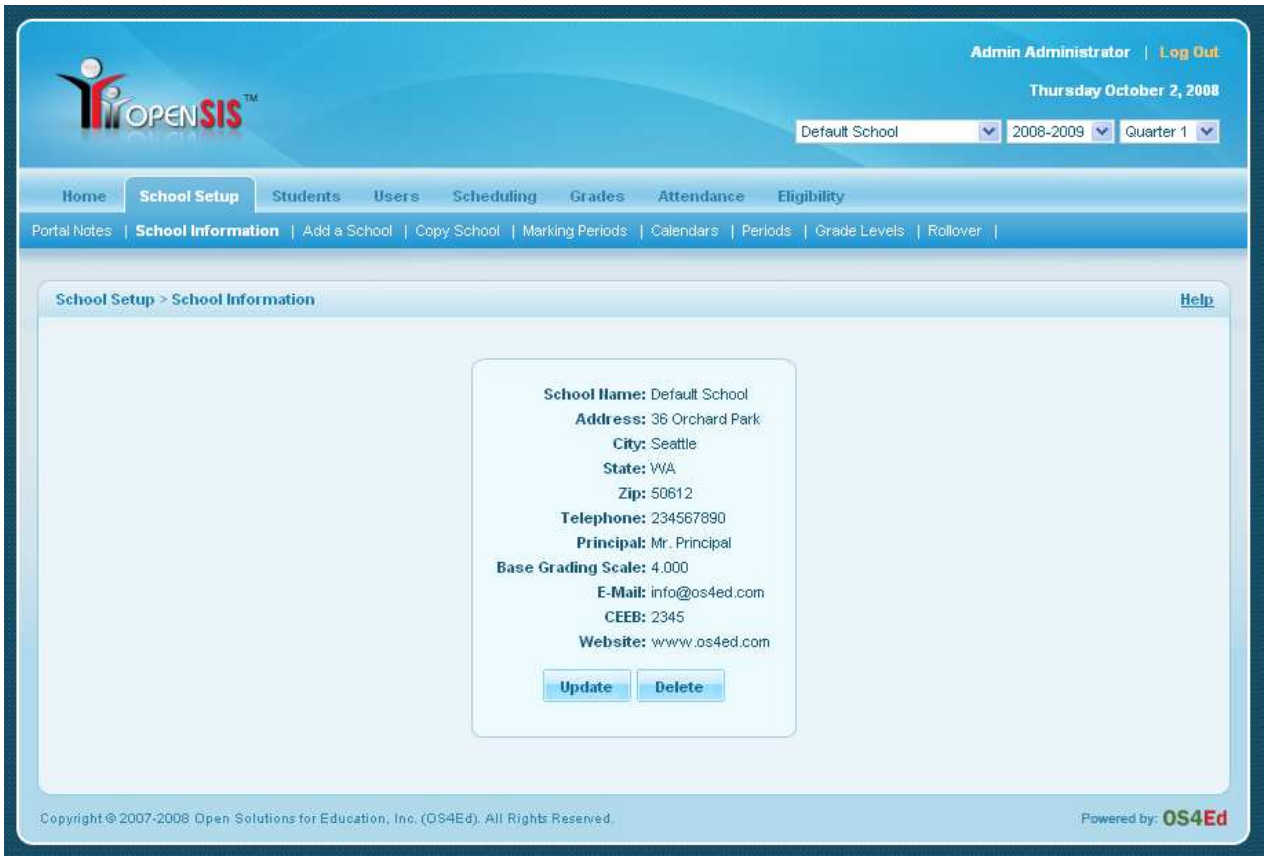
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3. School Setup

To access this page choose **School Setup >> School Information** from the tabs and sub menus used to navigate within openSIS.

The automated installer creates a default school during installation. This is a security feature by design and required for you to login to the system. Once logged in, you can update the existing information with your School's Information. To edit and change the default school information, simply click on the existing text and it will become an editable text input field. Enter the updated information and click "Update."

You also have the option to delete the school. However you cannot delete a school if you have existing students enrolled in that school.



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4. Marking Periods

To access this page choose **School Setup >> Marking Periods**

Marking Periods are where you setup your school's marking periods for a school year. There are four default tiers of marking periods added during the installation: Year, Semesters, Quarters, and Progress periods. openSIS installation scripts create 2 Semesters and 4 Quarters by default. However you can always have more or fewer as required by your school. Similarly, there can be any number of progress periods in a given quarter.

To add a marking period, click on the Add button (+) in the column corresponding to the type of marking period you want to add. Then, complete the marking period's information in the fields above the list of marking periods and click the "Save" button.

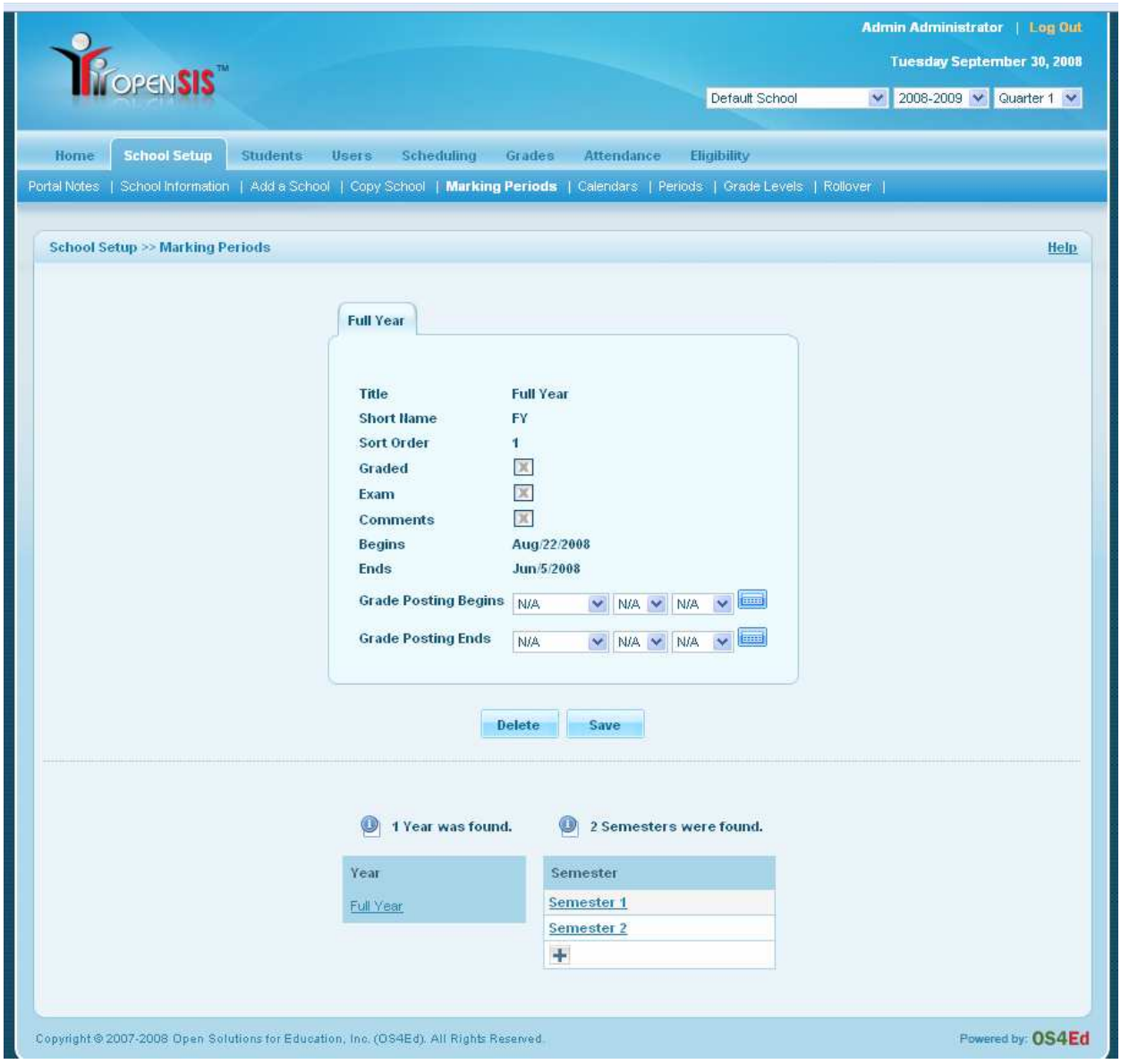
To edit a marking period, click on the marking period you want to change, and click on whatever value you want to change. It will automatically become editable. Update the value and click the "Save" button.

To delete a marking period, select it by clicking on its title on the list and click the "Delete" button at the top of the screen. You will be asked to confirm the deletion.

Note: You cannot delete a marking period if it has students assigned to periods in that marking period.

Notice that neither two marking periods nor two posting periods in the same tier can overlap dates.

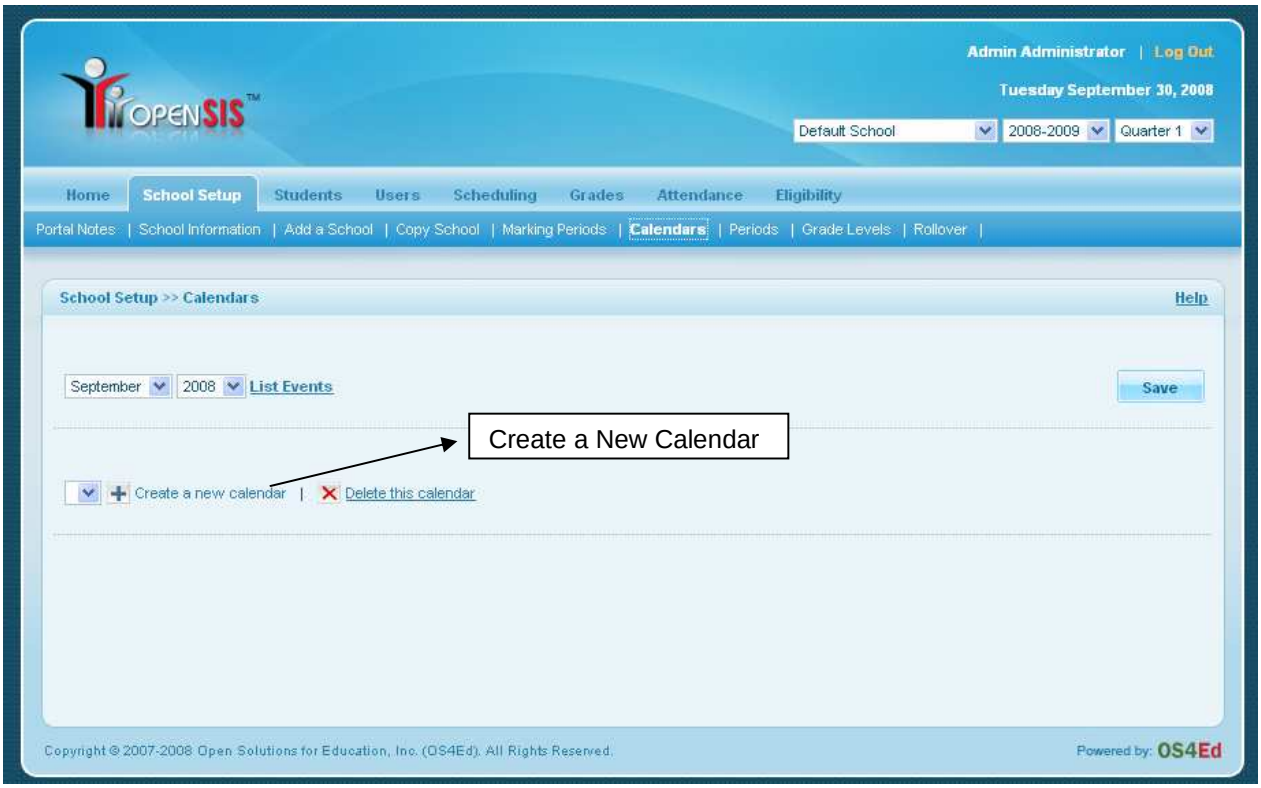
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Admin Administrator | Log Out
Tuesday September 30, 2008
Default School
2008-2009
Quarter 1
Home
School Setup
Students
Users
Scheduling
Grades
Attendance
Eligibility
Portal Notes | School Information | Add a School | Copy School | Marking Periods | Calendars | Periods | Grade Levels | Rollover |
School Setup >> Marking Periods
Help
Full Year
Title
Full Year
Short Name
FY
Sort Order
1
Graded
Exam
Comments
Begins
Aug/22/2008
Ends
Jun/5/2008
Grade Posting Begins
N/A
Grade Posting Ends
Delete
Save
1 Year was found.
2 Semesters were found.
Year
Full Year
Semester
Semester 1
Semester 2
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5. Calendars

To access this page choose **School Setup >> Calendars**

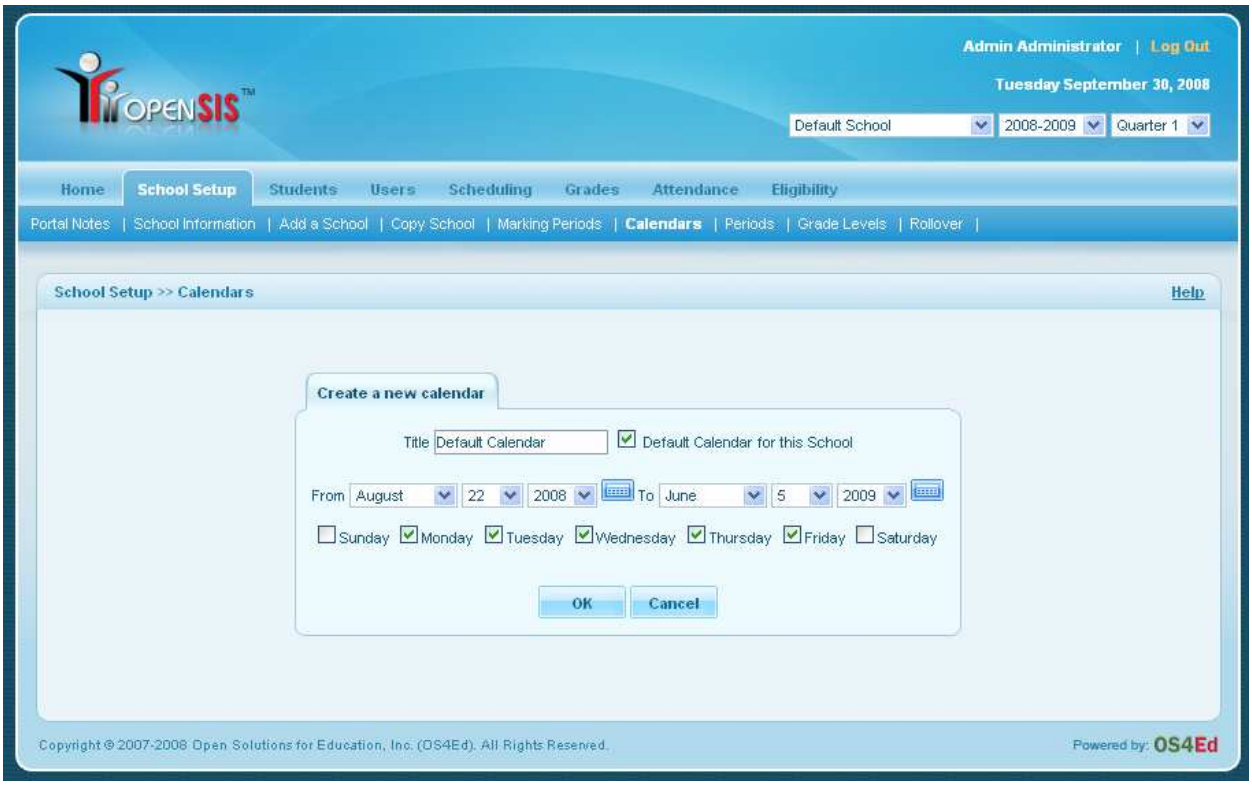
This page allows you to setup your school's calendar for the year. Click on the link that says “Create a new Calendar.” To understand the default options and what they mean while setting up the school calendar follow image below.



This is the page where you create a new School Calendar. The calendar displays the regular school starting and ending date/month by default. The month and year displayed can be changed by changing the month and year pull-down menus at the top of the screen and clicking the "Update" button.

It is mandatory for you to setup one for day to day functioning of the application. Note: The calendar is required for the application to function properly, so you must set up at least one school calendar.

- Give it a name in the Title input.
- Select the starting and ending dates for the school year.
- Check the standard days where your school has schooldays. Unchecked days are not regular school days and will not be used for taking attendance and calculating attendance percentages.
- Once you are ready, click “OK” to create the calendar.

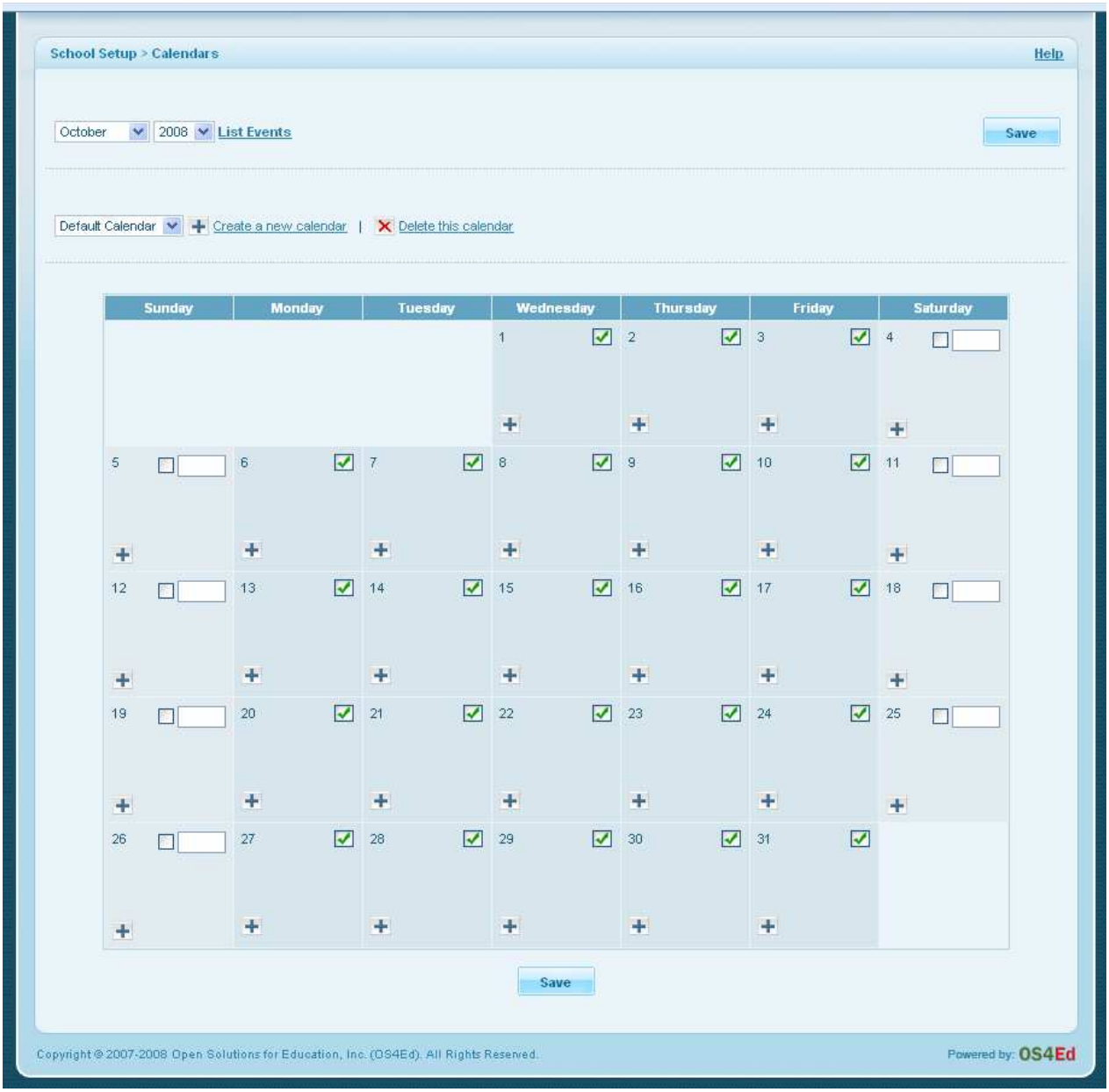


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On full school days, the checkbox in the upper right-hand corner of the day's square should be checked. For partial days, the checkbox should be unchecked and the number of minutes the school will be open should be entered into the text box next to the checkbox. This is used to correctly calculate attendance on partial school days.

For days on which there will be no school (holidays, teacher workdays, etc.), the checkbox should be unchecked and the text field should be blank. To uncheck the checkbox or change the number of minutes in the school day, you must first click on the value you want to change. After making any changes to the calendar, click the "Update" button at the top of the screen. This must be done for each month in the school calendar.

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School Setup > Calendars
Help
October
2008
List Events
Save
Default Calendar
Create a new calendar
Delete this calendar
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Save
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6. Periods

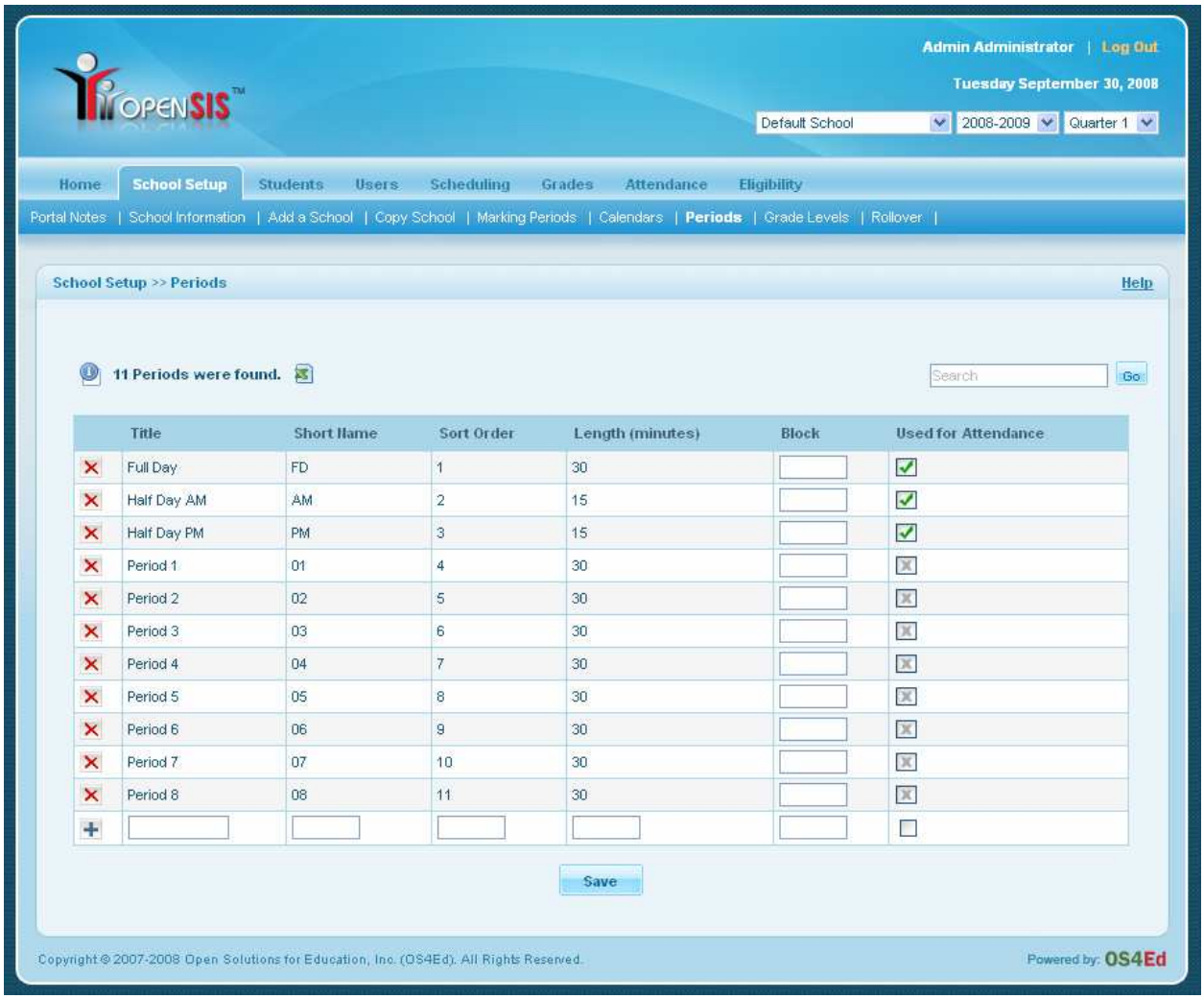
To access this page choose **School Setup >> Periods**

This page allows you to setup your school's individual class periods. The openSIS installation script creates a group of default periods. Update these periods to match yours and delete the extra periods created during installation if necessary.

Middle and high schools will likely have multiple periods in a school day, where elementary schools may have only one period (called All Day) or perhaps three (All Day, Morning, and Afternoon). If required, you can add new periods very easily. To add a period, fill in the period's title, short name, sort order, and length in minutes in the empty fields at the bottom of the periods list and click the "Save" button.

To modify a period, click on any of the period's information, change the value, and click the "Save" button. To delete a period, click the delete icon (X) next to the period you want to delete. You will be asked to confirm the deletion.

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Admin Administrator | Log Out
Tuesday September 30, 2008
Default School
2008-2009
Quarter 1
Home
School Setup
Students
Users
Scheduling
Grades
Attendance
Eligibility
Portal Notes | School Information | Add a School | Copy School | Marking Periods | Calendars | Periods | Grade Levels | Rollover |
School Setup >> Periods
Help
11 Periods were found.
Search
Go
Title
Short Name
Sort Order
Length (minutes)
Block
Used for Attendance
Full Day FD 1 30
Half Day AM AM 2 15
Half Day PM PM 3 15
Period 1 01 4 30
Period 2 02 5 30
Period 3 03 6 30
Period 4 04 7 30
Period 5 05 8 30
Period 6 06 9 30
Period 7 07 10 30
Period 8 08 11 30
Save
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7. Grade Levels

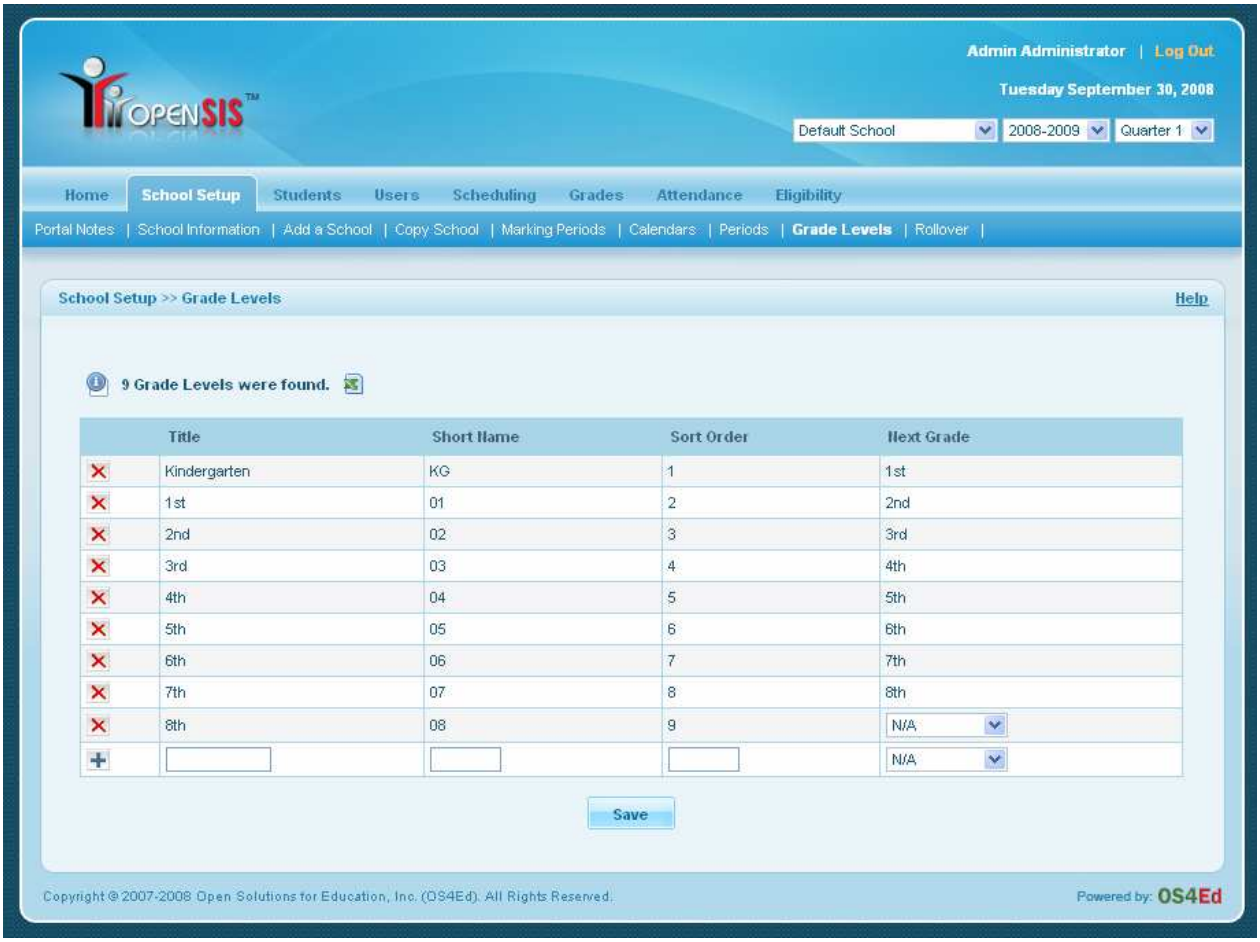
To access this page choose **School Setup >> Grade Levels**

This page allows you to setup your school's grade levels. By default the openSIS installer creates all the grades from Kindergarten to the 8th Grade. If your school has a different grade level structure, simply delete the extra Grade Levels. Similarly if you have some grades that have not been created, create them on this page.

To add a grade level, fill in the grade level's title, short name, sort order, and next grade in the empty fields at the bottom of the grade levels list and click the "Save" button. The "Next Grade" field indicates the grade students in the current grade will proceed to in the next school year.

To modify a grade level, click on any of the grade level's information, change the value, and click the "Save" button. To delete a grade level, click the delete icon (X) next to the grade level you want to delete. You will be asked to confirm the deletion.

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8. **Attendance Codes**

To access this page choose **Attendance >> Setup >> Attendance Codes**

This page allows you to setup your school's attendance codes. Attendance codes are used in the teacher's "Take Attendance" program (as well as most of the Attendance reports) and specify whether or not the student was present, absent or tardy during the period, and the associated comment or reason if desired.

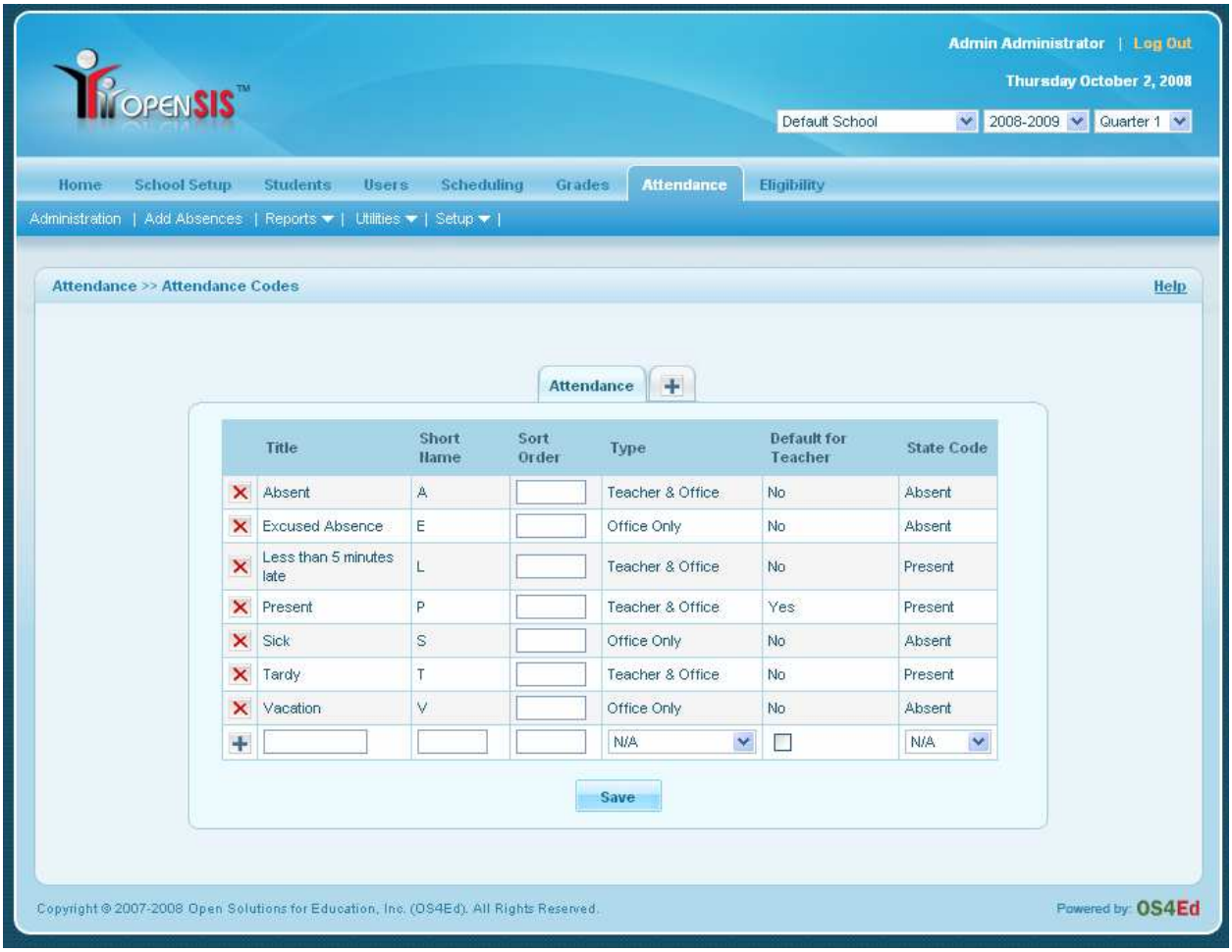
To add an attendance code, fill in the attendance code's title, short name, type, and state code. Select whether or not the code should be a teacher's default from the empty fields at the bottom of the attendance codes list and click the "Save" button. Generally, the attendance code called "Present" will be marked as the teacher's default. If the attendance code is marked as being type "Teacher," a teacher will be able to select that attendance code from

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their "Take Attendance" program. Administrators will be able to assign all codes to a student.

To modify an attendance code, click on any of the attendance code's information. Change the value and click the "Save" button.

To delete an attendance code, click the delete icon (X) next to the attendance code you want to delete. You will be asked to confirm the deletion.



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9. Setup Report Card Grades

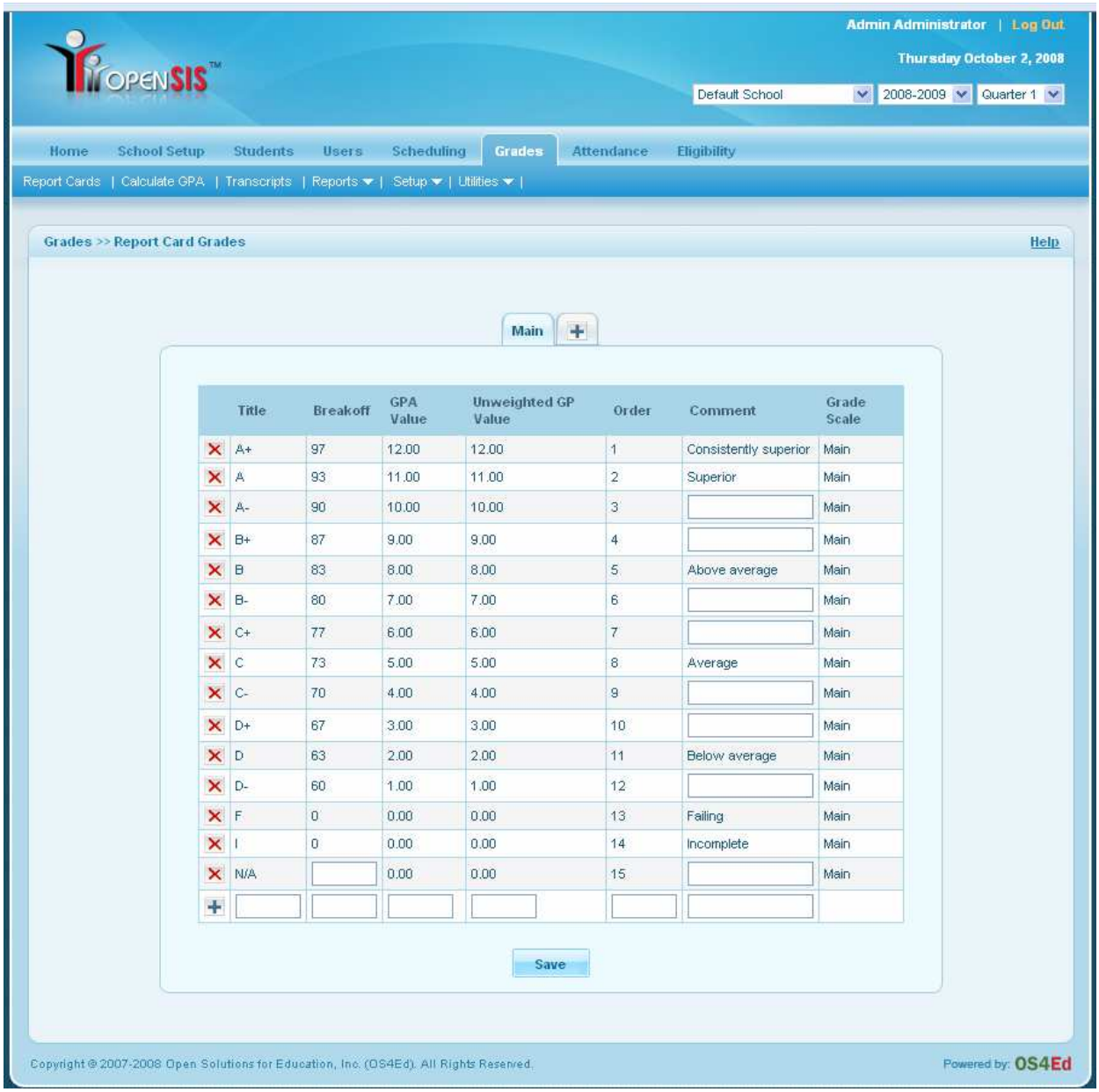
To access this page choose **Grades >> Setup >> Report Card Grades**

This page allows you to set up grades and their respective break-off marks. You may have multiple grade scales and weighting if desired. To add a new grade scale, simply click the “+” sign next to the Main tab to create another grade scale.

To modify a Grading code click on any of the attendance code's information, change the code and click the "Save" button.

To delete a grade code, click the delete icon (X) next to the attendance code you want to delete. You will be asked to confirm the deletion.

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	Title	Breakoff	GPA Value	Unweighted GP Value	Order	Comment	Grade Scale
✕	A+	97	12.00	12.00	1	Consistently superior	Main
✕	A	93	11.00	11.00	2	Superior	Main
✕	A-	90	10.00	10.00	3		Main
✕	B+	87	9.00	9.00	4		Main
✕	B	83	8.00	8.00	5	Above average	Main
✕	B-	80	7.00	7.00	6		Main
✕	C+	77	6.00	6.00	7		Main
✕	C	73	5.00	5.00	8	Average	Main
✕	C-	70	4.00	4.00	9		Main
✕	D+	67	3.00	3.00	10		Main
✕	D	63	2.00	2.00	11	Below average	Main
✕	D-	60	1.00	1.00	12		Main
✕	F	0	0.00	0.00	13	Failing	Main
✕	I	0	0.00	0.00	14	Incomplete	Main
✕	N/A		0.00	0.00	15		Main
+							

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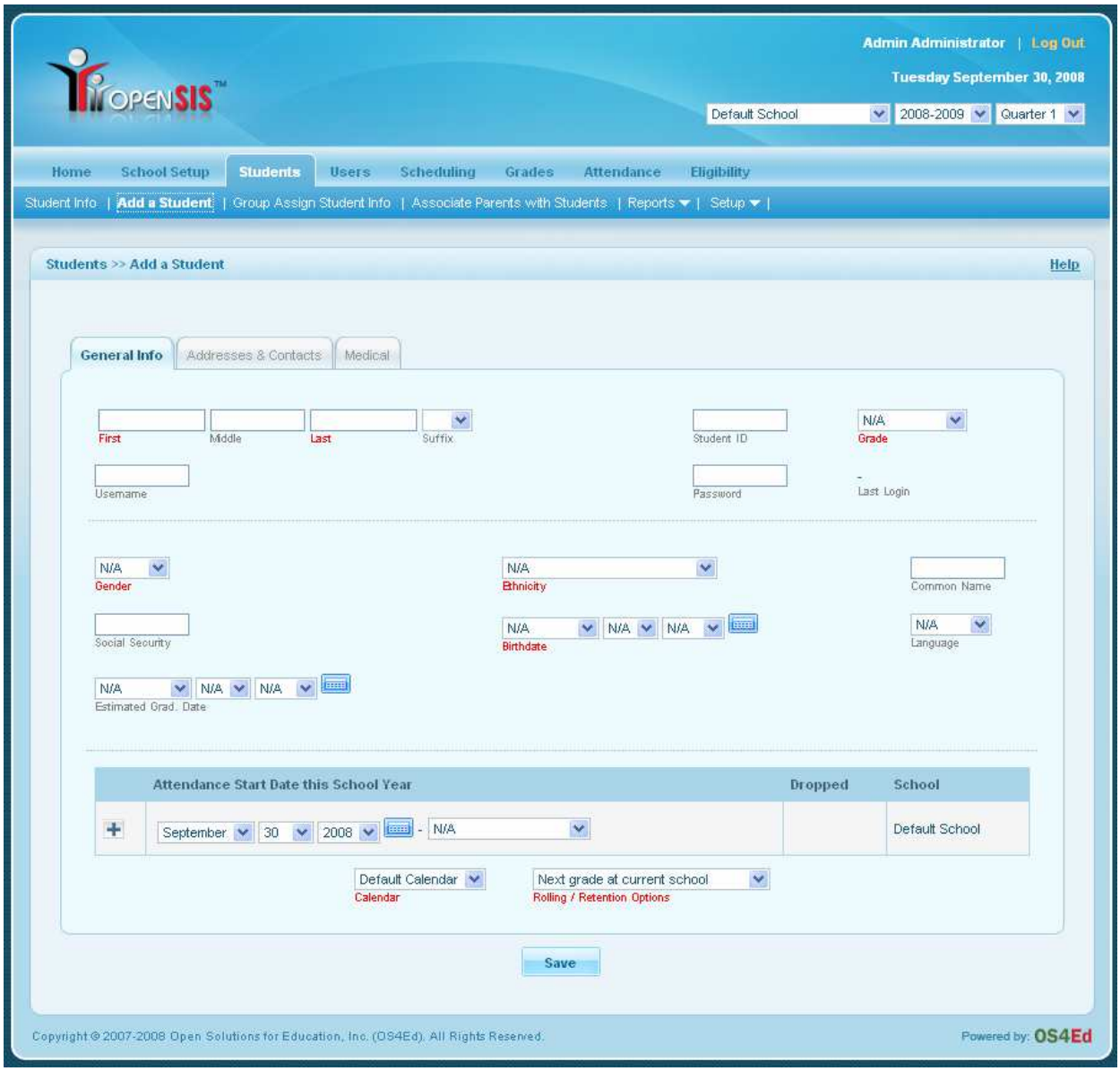
10. Add Student

To access this page choose **Students >> Add a Student**

The first thing you need to do after the School setup is complete is add your students from the “Add a Student” screen. The fields marked in red are mandatory fields. Note that a student cannot have duplicate “Student ID” or “Username.” This will result in a conflict.

If you do not assign you own student ID, the system will automatically assign an ID starting at the next available number and incrementing by one. (1,2,3,4…..) If you choose to add ID’s and allow some to be automatically assigned, you may have conflicts. Keep this in mind as you consider how to assign student ID’s.

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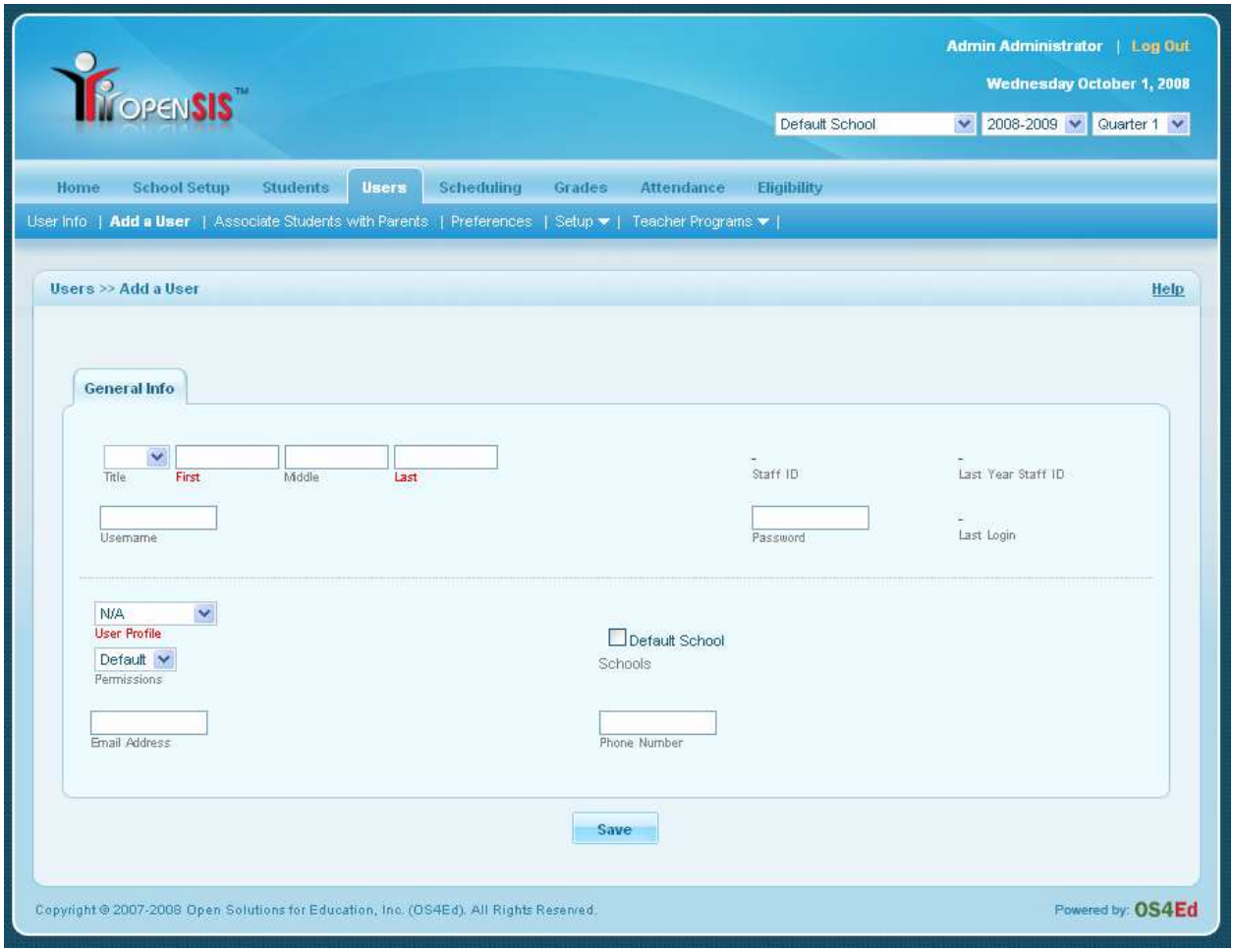

Admin Administrator | Log Out
Tuesday September 30, 2008
Default School
2008-2009
Quarter 1
Home
School Setup
Students
Users
Scheduling
Grades
Attendance
Eligibility
Student Info | Add a Student | Group Assign Student Info | Associate Parents with Students | Reports | Setup |
Students >> Add a Student
Help
General Info
Addresses & Contacts
Medical
First
Middle
Last
Suffix
Student ID
Grade
Username
Password
Last Login
Gender
Ethnicity
Common Name
Social Security
Birthdate
Language
Estimated Grad. Date
Attendance Start Date this School Year
Dropped
School
September
30
2008
N/A
Default School
Default Calendar
Calendar
Next grade at current school
Rolling / Retention Options
Save
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11. Add Teachers

To access this page choose **Users >> Add a User**

After you are finished adding students we need to add Teachers in our system. The screen is pretty much self-explanatory. In case of users the application automatically assigns the “User ID” so you don’t have to worry about it. Remember to select the Profile as Teacher in the “User Profile” dropdown.

Make sure you select the checkbox beside the school name. Here again just like the students section, no two users can have the same username.



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12. Setup Courses

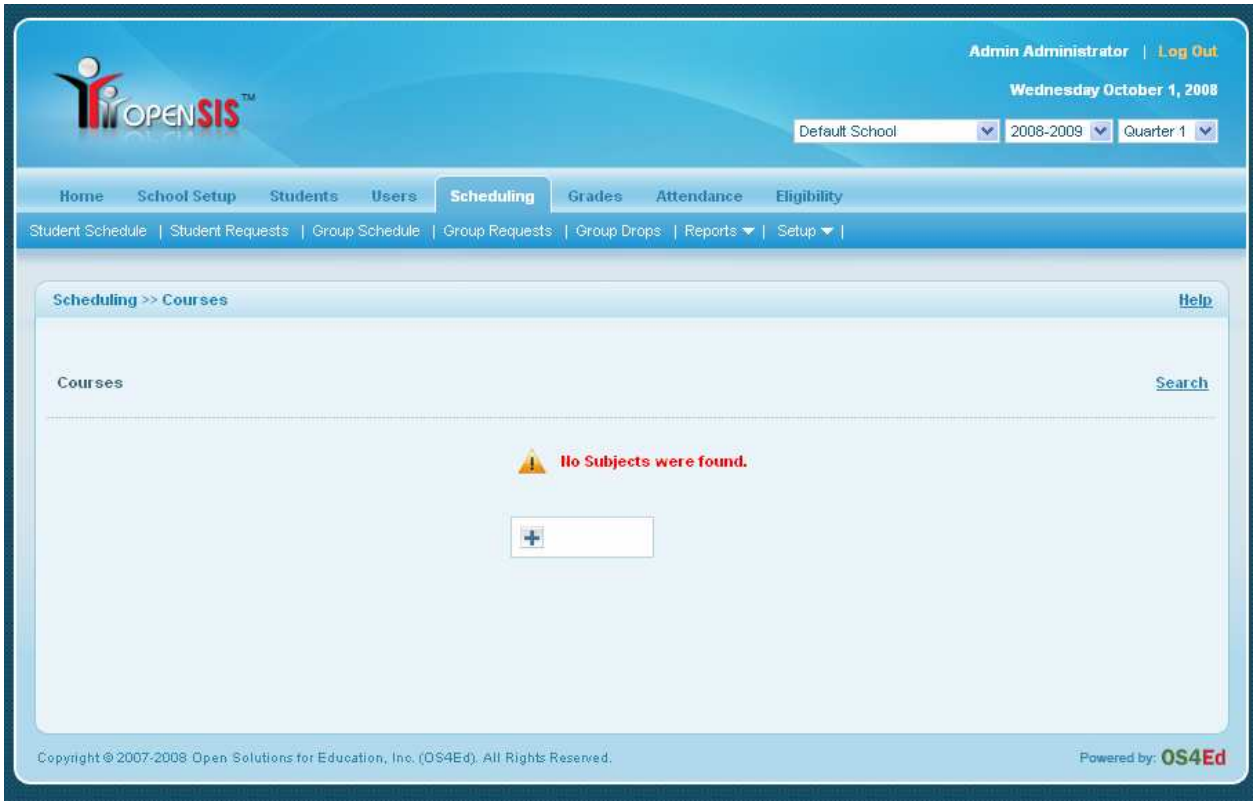
To access this page choose **Scheduling >> Setup >> Courses**

This page allows you to setup your school's courses. There are three tiers of courses: Subjects, Courses and Course Periods. To add any of these three things, click on the Add icon (+) in the column corresponding to what you want to add. Then, fill in the information requested in the fields above the list of marking periods and click the "Save" button.

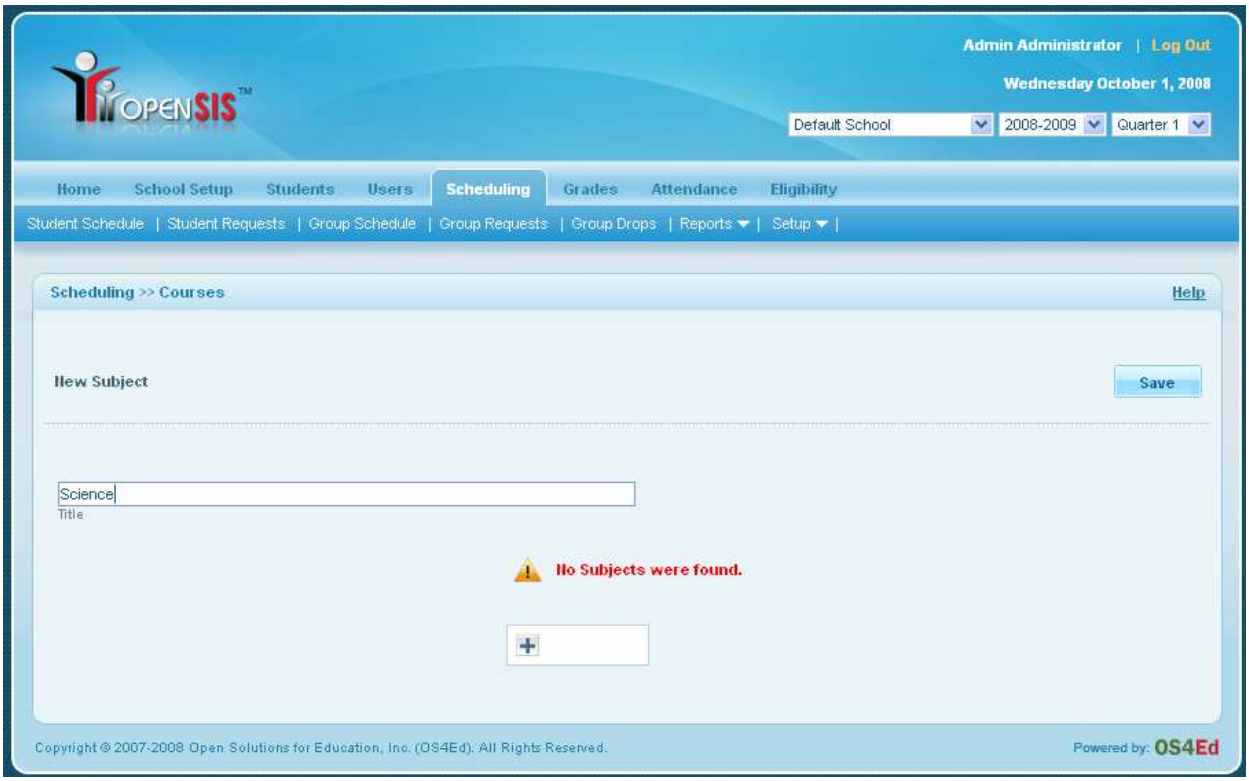
To change any of these four things, click on the item you want to change, and click on whatever value you want to change in the grey area above the lists. Then, change the value and click the "Save" button.

Finally, to delete something, select it by clicking on its title on the list and click the "Delete"

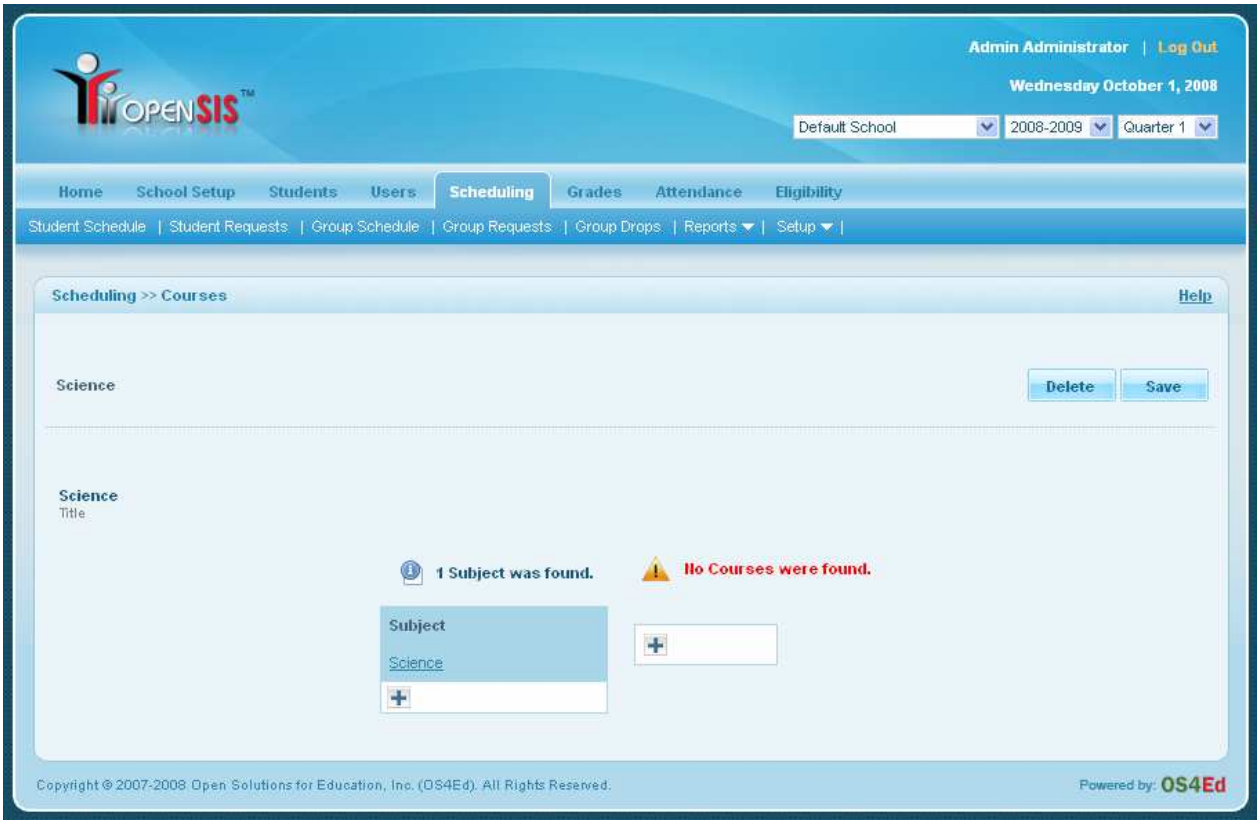
To add a Course click on the Add icon (+) in the column corresponding to the alert message that says “No Subjects were found”



Here we are adding a new Subject by entering a Title for the Subject. Click “Save” to add the Subject Name you entered.



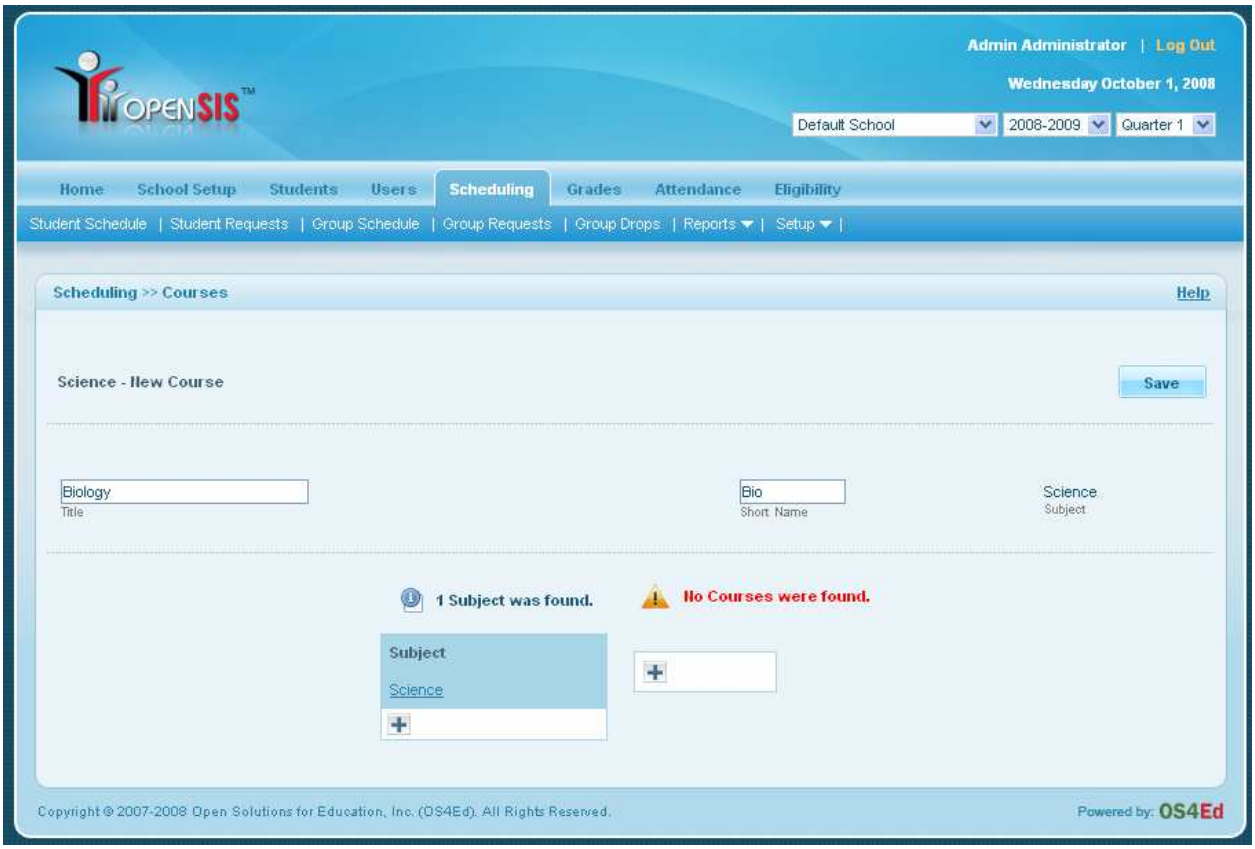
After you saved the Subject, you will be re-directed to the next section where you can view the Subject you added. Here you can add a course under the Subject you added by clicking on the (+) button below the alert message that says “No Courses were found.”



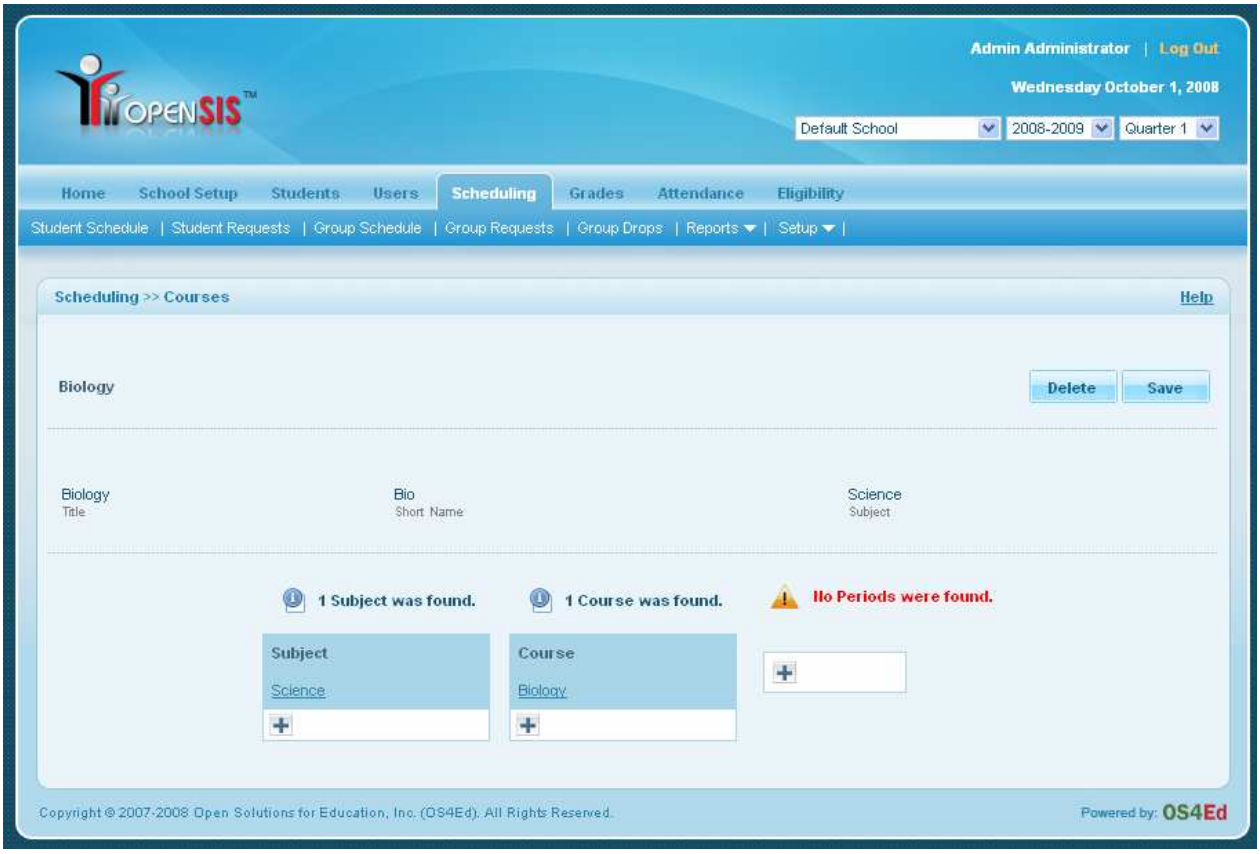
On the next screen add a new course. Give it a Title and Short Name. The short name is used as a reference code while assigning the course to a student so it is helpful if you keep a short

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name that can be easily identified as to which course it depicts. Click on “Save” to save the Course.

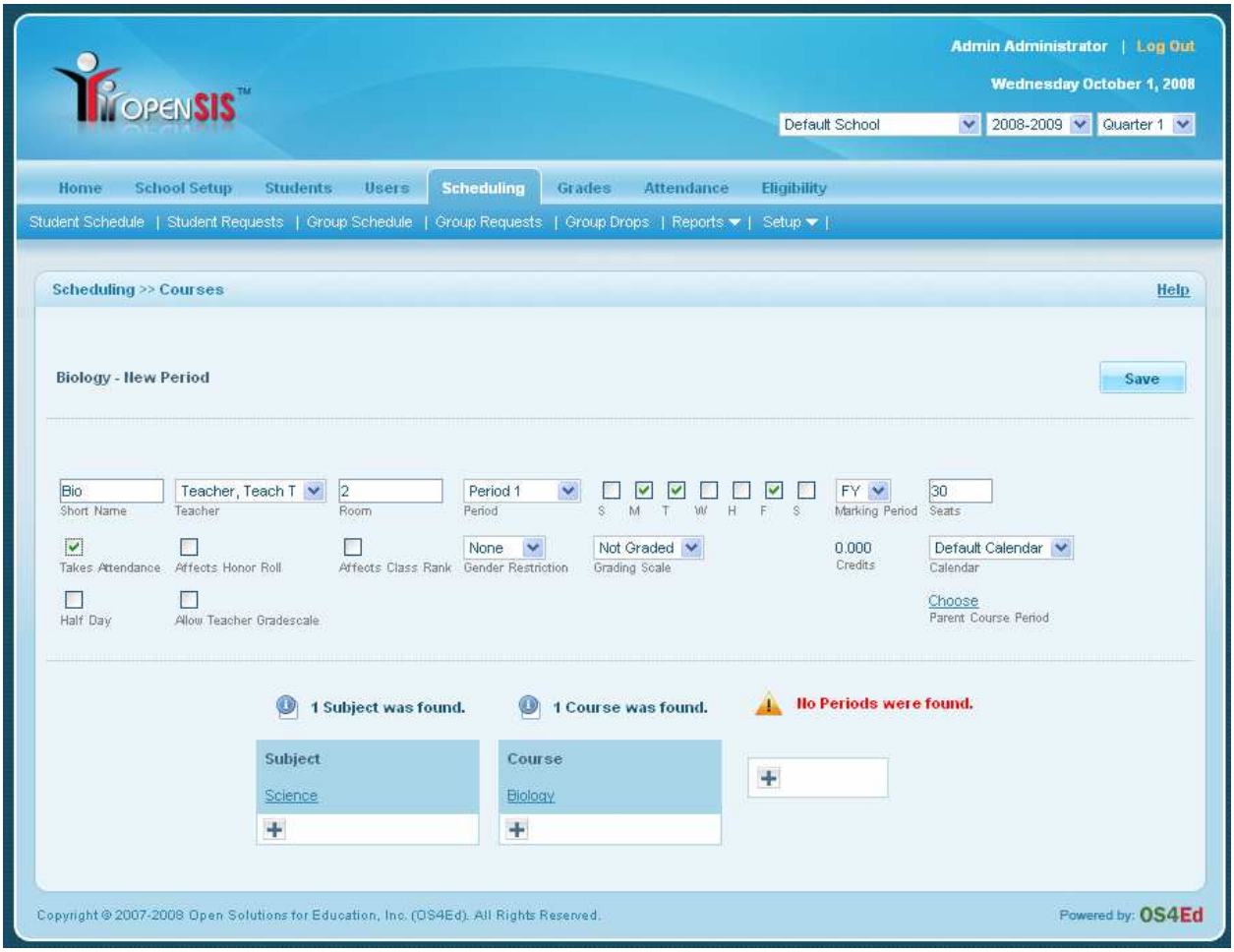


The screen below shows you the newly added course. Now we can create a Period. Click on the (+) button bellow the alert that says “No Periods were found” and add a new Period to this course.



Add a new Period on this screen. Give it a relevant “Short Name,” select a teacher in the dropdown. Assign a room to this course. Select the period when you want to assign this period. Select the days on which you have the periods. Select the Marking period. Check the “Takes Attendance” checkbox or your teachers won’t be able to take attendance for the period.

Also remember to add the Total Seats for this period or you won’t be able to schedule students to this period. Choose any other relevant checkbox or drop down menu values such as Grading Scale, School Calendar, etc.

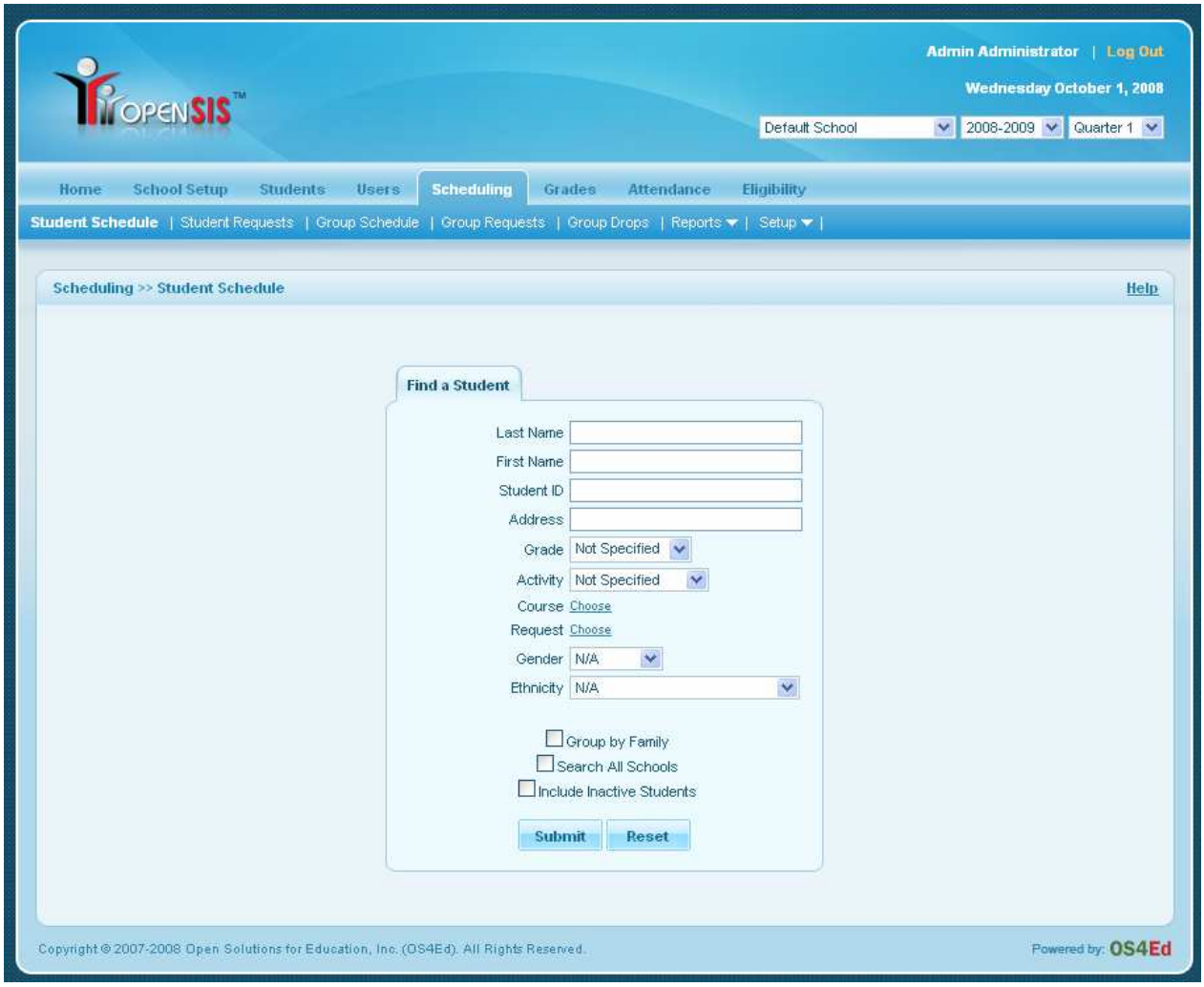


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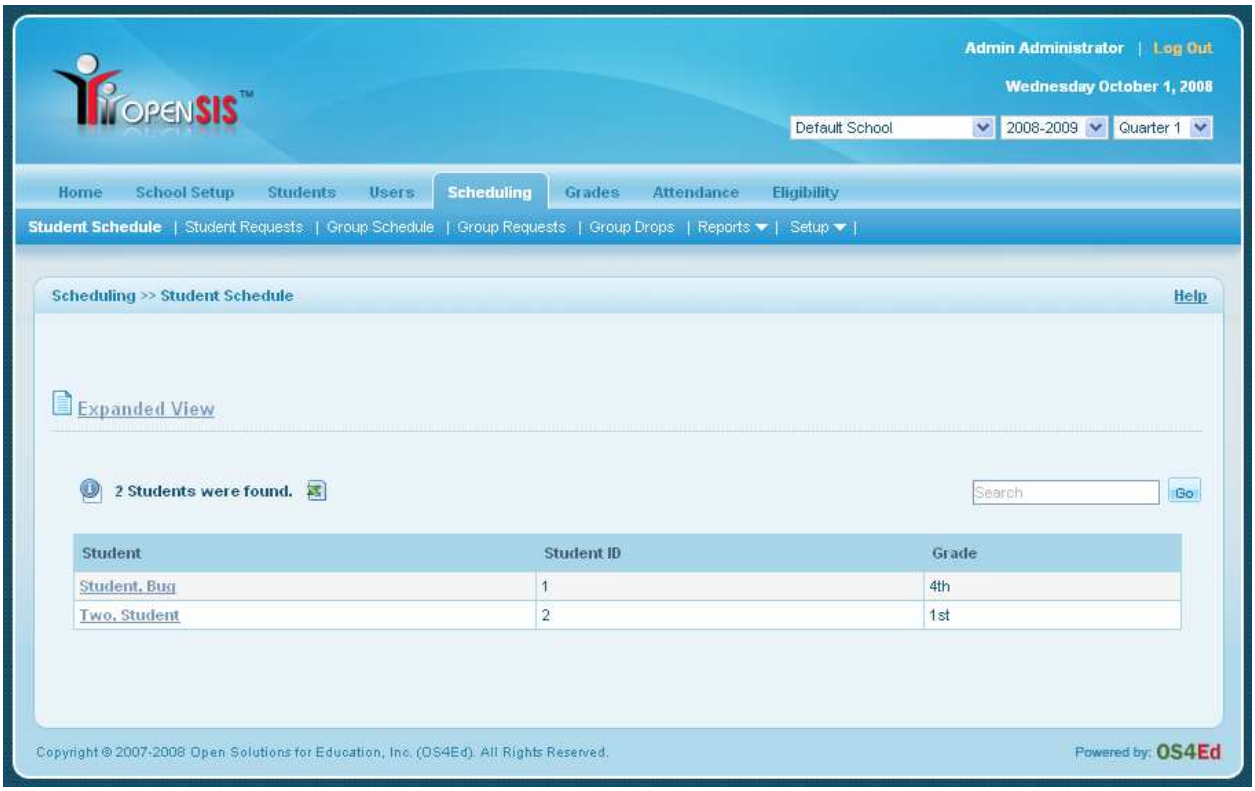
13. Assigning periods to Students

To access this page choose **Scheduling >> Student Schedule**

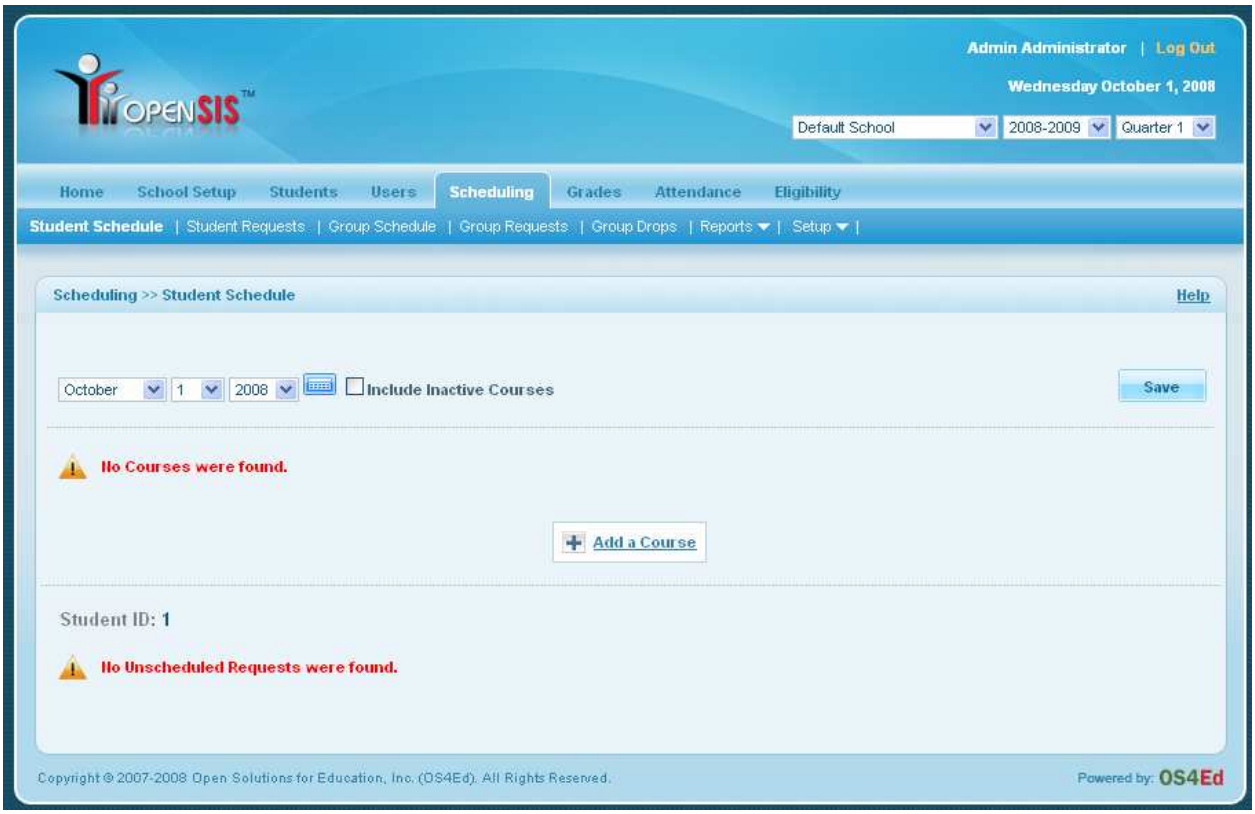
You will have a default search screen. Do a blank submit to get all students or use the fields to obtain a specific list of students.



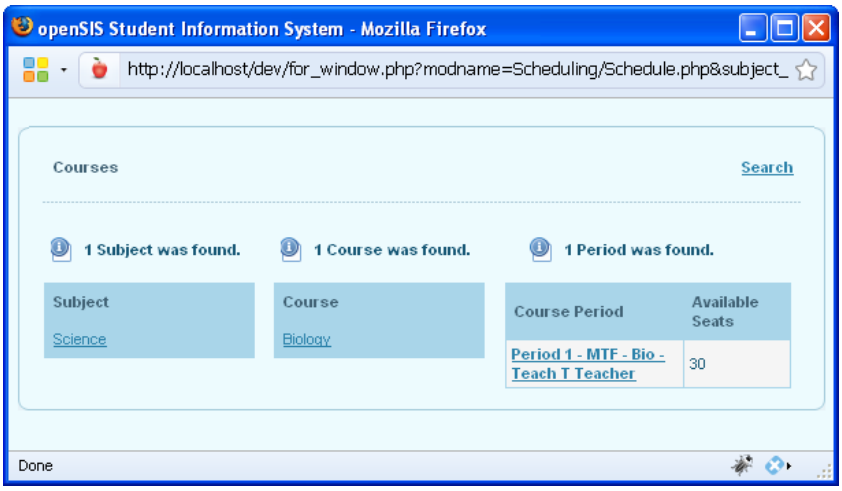
The search result will present you a list of the students based on the search criterion. Select one of the students to assign him to the period you created.



In this screen we will assign to the chosen student a class period. Click on the (+) button that says “Add a Course.”

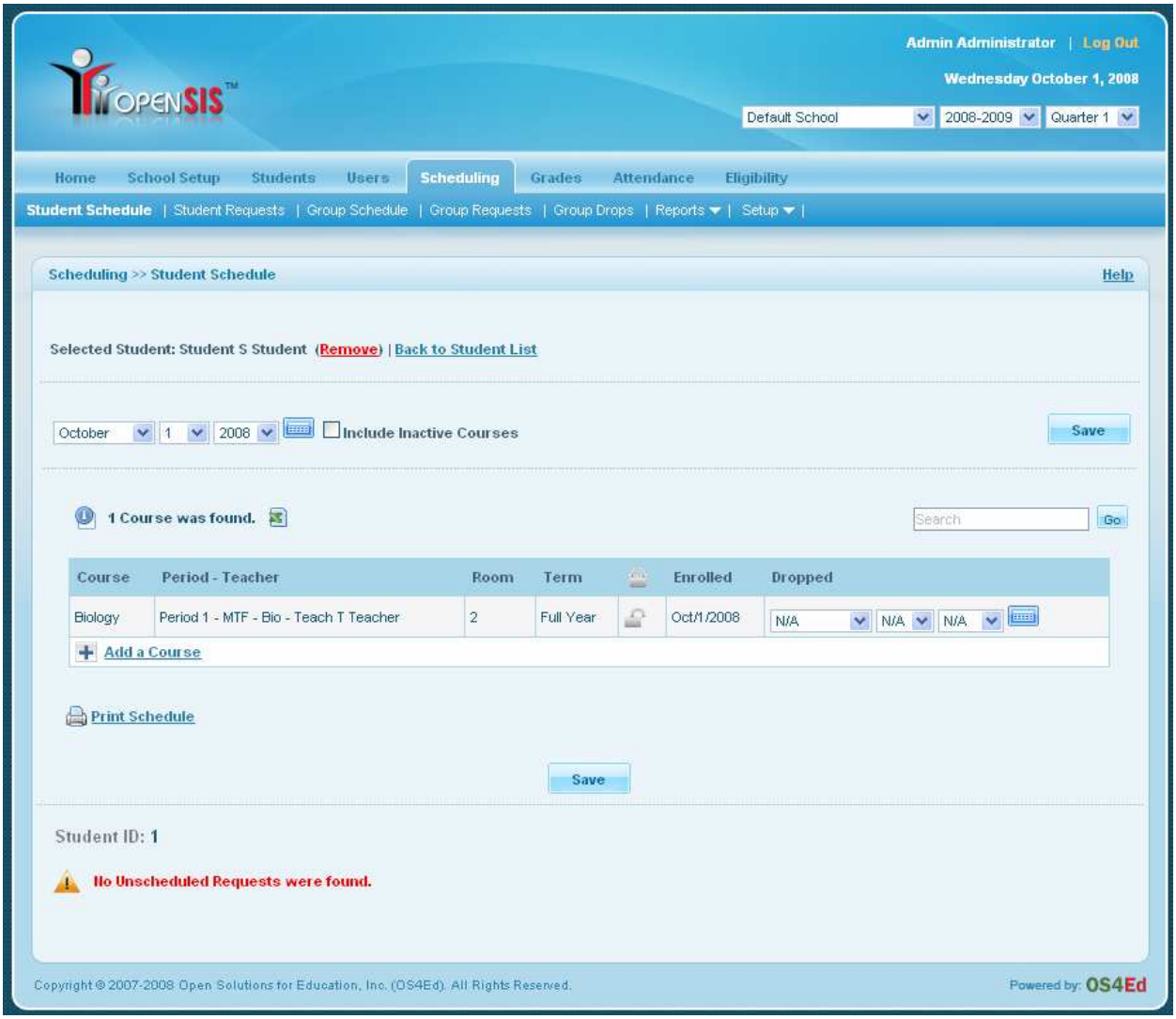


In the pop-up window select the period you want to assign to the student by clicking on the period of your choice.



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As you see below, the period you selected automatically gets assigned to your selected student. Everything you need for the school session is configured. The respective teacher can take attendance for this student and assign him/her grades etc.



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