

OVERSEER 1.9

Database Overview

Robust Software Inc.

12329 Fifth Line
RR#1 Limehouse, Ontario, Canada
L0P 1H0

www.robustsoftware.com
voice: (905) 877-2686
fax: (905) 877-3632

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***Administrative Software
for Independent Schools***

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1. INTRODUCTION

This document provides an overview of the information managed by the *Overseer 1.9* master database. This database is the central repository for information which is used by two applications: *Overseer Admin* for administrative staff, and *Overseer LAN* for teachers.

The *Overseer* master database (or *Main* database) is quite distinct from the *Grades* databases used by teachers in conjunction with the *Overseer Grades* application.

Grades databases are personal and portable. They derive information from the *Overseer* master database when term files are created or synchronized (via *Overseer Admin* or *Overseer LAN*). Information can also be imported to the *Overseer* master database from *Grades* databases at the end of each term (via *Overseer Admin* or *Overseer LAN*). Otherwise, *Grades* databases are managed and used solely by individual teachers, whereas the *Overseer* master database is a shared resource which may be accessed either by administrative staff (*Admin* users) or by teachers (*LAN* users).

Users of *Overseer Admin* have full access to all of the information on the master database. Teachers have direct access (via *Overseer LAN*) only to information about their home room classes and the students and classes that they teach. However, teachers have indirect access to considerable information about students' families, contact information for their parents etc. The content of the *Overseer* master database is therefore relevant to both administrative users, who have read/write access to the entire database, and to teachers, who have read/write access to some student and class information, but have read access only to other reference information.

For the sake of completeness, the database overview which follows will focus on the database content and access methods which are available through *Overseer Admin*, with the understanding that not all of the features and methods will be available to users of *Overseer LAN*. For the sake of brevity, the term *Overseer* will be used primarily to refer to *Overseer Admin* (and often to *Overseer LAN* as well) and the *Overseer* master database will simply be referred to as the *Overseer* database.

Most data fields within the *Overseer* database are described in this document, with one exception. *Comment* memo fields, which are prolific throughout the application and accompany most entities, relationships, affiliations, notes etc., are not described here for the sake of brevity.

The content is organized into three broad categories which correspond closely to the 3 main menu items of the application itself: *school* (current), *directory* (current) and *session* information.

1.1 Current Vs Active Content

The terms *current* and *active* have special meanings within *Overseer*. The word *current* is used in the sense of *today* (i.e. real-time from the users perspective). The word *active* (e.g. *active*

session or *active date*) means the assumed effective date or session for operating purposes.

The *active session* and *active date* are always displayed on the right side of the status bar at the bottom of the *Overseer* main display screen. Normally the *active session* and *active date* are the *current session* and *current date*. However, whenever the *active session* (and/or the *active date*) differs from the *current session* (and/or *current date*), it is displayed on a yellow background as a caution to the user.

Some entities within *Overseer* refer to *current* information and should be kept up-to-date. On the other hand, information on students, teachers, classes, bus routes and the school calendar is session-dependent, where a *session* is typically a school year (but may be a single term or semester), with a particular start date and end date spanning less than one calendar year.

Although the distinction between *current* and *active* information is fairly clear-cut in most cases, there are some instances (e.g. school staff, school rooms) where some historical data should be retained along with *current* information. There are also some instances (e.g. classes, bus routes) where *session* information must be updated as a result of changes during the session. These are described where applicable in the detailed sections to follow.

Figure 1. is a block diagram showing the key entities within *Overseer*. Note the distinction between *session-dependent* entities (with suffix ‘*’) and entities which contain *current information* (with suffix ‘#’). All of the entities shown in this figure, with the exception of the *Test* entity, are created and managed with *Overseer Admin*. Tests are created and used only within the *Overseer Grades* application. *Marking schemes* (see section 1.6) are only used within *Overseer Grades*, but they are created and maintained via *Overseer Admin*.

1.2 Hot-Links

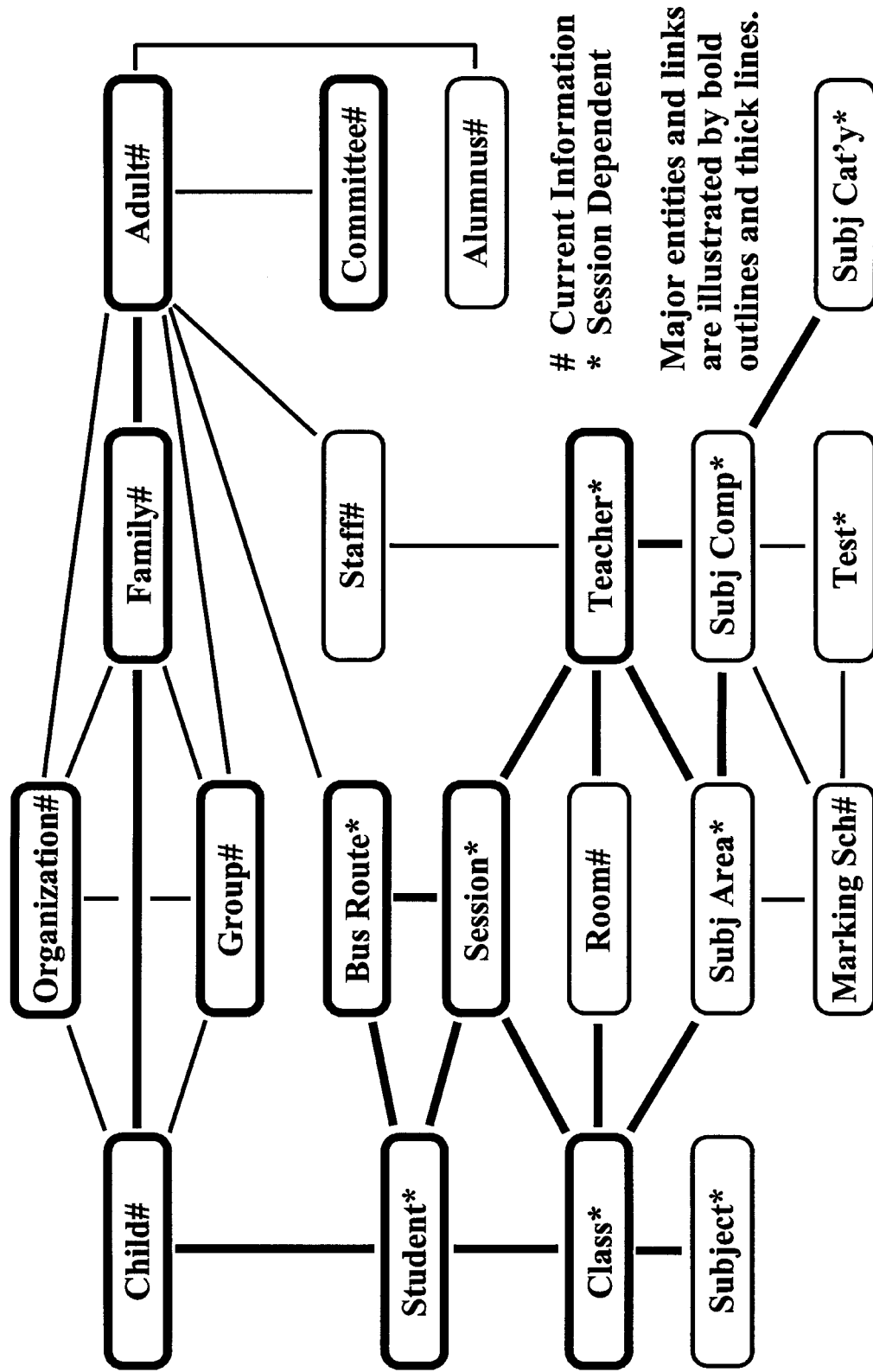
Within *Overseer*, *hot-links* are buttons on screens which provide short-cuts to detail information on related entities. As an example, a *Family hot-link* button within a *Child Detail* screen will open a *Family Detail* screen for the family of the relevant child. *Hot-links* provide the mechanism by which teachers may gain indirect access to information via *Overseer LAN*. All *hot-links* are listed in the following chapters for each entity in the database.

The many links between entities within *Overseer* are illustrated in Fig 1. which shows the key entity relationships. Major links are shown by thick lines whereas minor links have thin lines.

1.3 Filters

The term *filter* is used within *Overseer* as a criterion for selecting a subset of an entity (e.g. “*Families of students*” is a subset of “*All Families*”). All *filters* which are available to select subsets of children, adults, families, students, teachers, classes, organizations etc. are documented in the following chapters under the appropriate database entity.

Figure 1. Key Entity Relationships



1.4 Constraints

The term *constraint* is used within *Overseer* to indicate a mandatory condition to be satisfied, in addition to any *filter* which may be active, as a criterion for selecting a subset of an entity (e.g. “*Females Only*” is an additional *constraint* on the filter “Parents of Students” which could be applied to a list of *adults*). Although only one *filter* can be used at a time, it is possible to have more than one *constraint* in use simultaneously. When multiple *constraints* are specified, all of them must be satisfied simultaneously by all selected members.

All *constraints* which are available to select subsets of children, adults, families, students or organizations are documented in the following chapters under the appropriate database entity.

1.5 Groups

A *group* within *Overseer* is a named collection of adults, children, families and/or organizations. It may represent any convenient *group* within the local school or school community (e.g. “School Band” or “Volunteers for lunch-room duty”).

However, when used with *filters* and *constraints*, one or more *groups* may be combined in complex ways to enable rapid selection of persons, families or organizations based on criteria for inclusion or exclusion to meet fairly advanced selection criteria, ending up with a list of names which could be printed as a titled report for some custom purpose.

Although *groups* are used with *filters* and *constraints*, they are also entities in themselves and are therefore documented in the following chapters as a current entity of the database directory.

2. SCHOOL: CURRENT INFORMATION

This chapter summarizes the current information within *Overseer* which pertains to the local school of the user.

2.1 General

The following general data fields are available to the user:

<i>School Name:</i>	(mandatory) full name of school
<i>School Abbreviation:</i>	(mandatory) abbreviation of school; appears on status bar of main screen
<i>Jurisdiction:</i>	(optional) provincial or state department or agency which has jurisdiction over the local school; selected from existing non-profit agencies in database
<i>School Registration:</i>	(optional) registration number of local school under provincial or state jurisdiction; for reference only
<i>Board Registration:</i>	(optional) registration number of provincial or state Board under which school is registered; for reference only
<i>Affiliated Organizations:</i>	(optional) organizations with which the local school is affiliated; selected from existing organizations in database; for reference only

Note: The local school should not be entered under the list of schools managed by the database. It is treated uniquely within *Overseer* and is distinct from all other schools.

2.2 Address

Provision exists for recording two separate addresses for the local school: a *principle address* and an *alternate address*. The *alternate address* is intended for a second building or a planned move etc. Both exist for reference only and are not currently used by *Overseer*. This may change in future releases.

Both addresses also have provision for recording local *phone* and *fax* numbers as well (for reference only).

Note: The *State/Province* field and the *Country* field in the local school's *principle address* are used as default values for the addresses of all families and organizations recorded within *Overseer*.

2.3 Rooms

All rooms within a school which are used as meeting places for students should be assigned a

room name/number. There may be merit in assigning an artificial name (e.g. “yard”) to the playground to designate (via class timetables) where children spend their recess time and/or to indicate when individual teachers are assigned yard duty (via teachers’ duties).

Overseer links teachers to classes via the *room* name/number. Although classes are assumed to be fixed for an entire session, including class timetables and *room* allocations, *Overseer* has provision for recording teachers’ assignments for partial sessions (e.g. to accommodate pregnancy leaves). Thus, on any active date during any session, *home-room* teachers and *home-room* classes are linked via the *home-room* name/number. Also, for any time during any school day, classroom teachers are linked to class periods via the *room* name/number in their respective duties and timetables.

Home room assignments for classes and teachers are particularly important when using *Overseer LAN* and *Overseer Grades*. Each teacher will have access to information only for those classes and students that are in the teacher’s home room OR are taught one or more subject areas or subject components by that teacher. Consequently, if either the class’ home room or teacher’s home room has not been designated correctly, then the class may not appear in the teacher’s class list through *Overseer LAN* or in the teacher’s *Grades* database through *Overseer Grades*.

Unique *room* names/numbers should therefore be assigned to every meeting place for students and teachers which could potentially appear on class timetable or teacher duties. The fields recorded are the following:

- Room:* (mandatory) 1-8 alphanumeric name/number to uniquely identify a room or meeting place in the local school
- Capacity:* (optional) capacity (maximum number of students) of the room or meeting place; for reference only
- Location:* (optional) description of the room’s location; for reference only

Note: Deletion of *room* records from *Overseer* is generally not a good idea, unless you know that there are no classes or teachers within the database which are linked via those *rooms*. A safer procedure (e.g. if *room* names/numbers are changed between one school session and the next) is to simply rename the old *room* names/numbers (e.g. change “101” to “Old101”) to permit reuse of the original name (“101”) for a new numbering/naming scheme.

2.4 Staff

Overseer supports recording of the following data fields for *staff* members (selected from the adult directory) in the local school:

- Formal Name:* (mandatory) name by which the *staff* member wishes to be addressed by students; used on report cards

<i>Position:</i>	(optional) position occupied by this <i>staff</i> member in the local school; appears in adult employment information; if custom report cards are used, and the principal's name is to appear on report cards, then he/she must be clearly designated as having the position: "Principal" (without the quotation marks).
<i>Active:</i>	(mandatory) designation of whether or not this person is actively on the <i>staff</i> of the local school. This field should be set to "N" for a retired or resigned <i>staff</i> member for whom teacher records need to be retained for a few more years before deletion.
<i>Next of Kin:</i>	(optional) closest relative or friend of staff member for emergency contact
<i>Login/Email:</i>	(mandatory) 1-12 character network <i>login name</i> and/or personal email name assigned to this <i>staff</i> member (guaranteed to be unique across all staff and students); auto-assigned but can be manually edited
<i>Password:</i>	(mandatory) 1-10 character network and/or personal email <i>password</i> assigned to this <i>staff</i> member); auto-assigned but can be manually edited
<i>Reference Information:</i>	(optional) Common textual reference information (in the form of a memo field) which the school chooses to record for each <i>staff</i> member. A template consisting of prompts for the various items of information to be recorded in this memo field may be set through the application preferences.
<i>Allergies/Treatment:</i>	(optional) Information and treatment for any medical or allergy health conditions of the staff member.
<i>Date of Birth:</i>	(optional) Date of birth of <i>staff</i> member
<i>Health Card Number:</i>	(optional) <i>Staff</i> member's health card number for medical emergencies
<i>Authorized LAN User:</i>	(mandatory) designation of whether or not a teacher is an authorized user of <i>Overseer LAN</i> . Teachers are not authorized until entered in the list of authorized users, subject to available licenses.
<i>Authorized Grades User:</i>	(mandatory) designation of whether or not a teacher is an authorized user of <i>Overseer Grades</i> . Teachers are not authorized until entered in the list of authorized users, subject to available licenses.
<u>Hot-Links:</u>	
<i>Adult:</i>	Adult detail information for <i>staff</i> member
<i>Next of Kin:</i>	Adult detail information for <i>staff</i> member's <i>next of kin</i>
<i>Med/Prof Contacts:</i>	Organization detail information for emergency medical or professional contacts for <i>staff</i> member
<i>Church Contacts:</i>	Organization detail information for emergency church contacts for <i>staff</i> member

- Notes:
1. For reasons mentioned above, the *staff* registry should include recently retired *staff* members as well as current *staff* members. Use the *active* field to distinguish between current and retired *staff*.
 2. When new teachers are added to the database for a *session*, they are selected from the list of *active staff* members. *Staff* members must therefore be assigned before teachers.

2.5 Contacts

The word *contact* is often used within *Overseer* to invoke detailed personal, family or organization information via a hot-link from another entity. However, it is also used in a more specific sense within the School | Reference | Contact tabsheet to mean local school *contacts*.

School *contacts* are organizations, adults, children or families who have specific duties or roles within the local school (e.g. the coordinator for hot-dog days, the bus company for student transportation, the school's service company for electrical work, the family in charge of gym rentals, the Student's Council president). These names exist for reference purposes only.

Contacts must be selected from the relevant directory of organizations, adults, children or families.

The following data field's are maintained for each *contact*:

Support Role: (optional) role which the organization, adult, child or family fills within the school.

Hot-Links: *Contact:* A *contact* button links to the relevant organization, adult, child or family detail information for the *contact*.

2.6 Alumni

Within *Overseer*, *alumni* are always adults, not children. However, after a specified number of years following graduation from the local school (or upon reaching an equivalent age, for students who did not graduate from the local school) children will automatically be promoted to adult status via the *Year-End Processing* utility. If they have been students in the local school at any time, they will be automatically registered as *alumni* during *Year-End Processing*.

Any adult in the school's database can be designated as an *alumnus* at any time by selection from the adult directory.

Alumni are not used explicitly by *Overseer*; however, one of the adult filters supports selection of *all alumni* and one of the family filters allows selection of *families of alumni*.

The following data field's are maintained for each *alumnus*:

- Enrolled Date:* (optional) earliest date on which the person was registered as a student in the local school
- Departure Date:* (optional) latest date on which the person was registered as a student in the local school
- Graduate:* (optional) indication of whether (“Y”) or not (“N”) the person is a graduate of the local school
- Last Known Institution Attended:* (optional) last known university, high school, college or other institution at which the alumnus received higher education
- Highest degree:* (optional) highest degree or certificate achieved by the alumnus at the above institution.
- Reference Information:* (optional) common textual reference information (in the form of a memo field) which the school chooses to record for each *alumnus*. A template consisting of prompts for the various items of information to be recorded in this memo field may be set through the application preferences.

Hot-Links: *Adult:* Adult detail information for *alumnus*

2.7 Divisions

Every grade level recognized by the school district of the local school must be assigned to a *division* corresponding to one or more consecutive grade levels (e.g. “primary”, “junior”, “intermediate” *divisions*).

Divisions are used to classify students, classes, teachers etc. as well as in filters for several entity types.

Each *division* must have a unique *division name* as well as a specified *range of grade levels* which are included in the *division*. This information may be changed at any time and will be applied to all sessions.

Each *division* must also have default marking schemes for use within *Overseer Grades*. One default marking scheme applies to *subject area* marks and *subject component* marks. A separate default marking scheme applies to *subject component tests*. Both of these initially default to “%”. The defaults can be modified via the *Approved Usage of Marking Schemes* table within the **School | Marking Schemes** menu option. New defaults only take effect within *Overseer Grades* after creating or synchronizing a *Grades* database via **Session** menu options for these purposes.

2.8 Grade Levels

A range of *grade levels* (e.g. “K”, “3”, “12”) must be specified for both the school district and the local school. The local school *grade levels* must be a subset of the school district recognized *grade levels*.

Non-numeric *grade levels* (<1 or >12) may have user-specified abbreviations (e.g. “PK). All *grade levels* may also be assigned descriptive *grade names* (e.g. “Kindergarten”), although these are not currently referenced by *Overseer*.

Grade levels are used extensively to classify students, classes, teachers etc. as well as in filters for several entity types.

The current *grade levels* may be changed at any time and will be applied to all sessions.

Note: Be careful in specifying the valid range of *grade levels* for your school district. This should rarely need to be modified and must always encompass the *grade levels* in active use within your database.

2.9 Default Subjects

Within *Overseer*, the term *subjects* is used to identify the curriculum elements which comprise the timetables for classes. These may differ from the line items which appear on report cards.

Because the *subjects* taught within a division are frequently the same for all grade levels, and may not change very much from year to year, provision exists within *Overseer* to define *default subjects* for each division. When a new class is defined, the *default subjects* may be adopted as a starting set of *subjects* for the class, based on the division to which the class belongs. These may then be refined to reflect minor differences in the *subjects* taught to different classes in the same division.

The *default subjects* for a division may be modified at any time without affecting the *subjects* for existing classes in the database. It is only when the *default subjects* are invoked for a class that the active *subjects*, if any, are deleted and replaced by the *default subjects*.

The following data fields characterize each *default subject* for a division:

Subject Abbreviation: (mandatory) unique 1-12 character abbreviation for the *subject* - suitable for use in a timetable. This field is reserved for possible use in future reports.

Subject Description: (mandatory) description of *subject* used in student timetables

2.10 Default Subject Areas and Subject Components

Within *Overseer*, the terms *subject areas* and *subject components* are used to identify the line

items which appear on report cards. *Subject areas* are broad categories (e.g. “Mathematics”) for which an overall mark may be assigned. *Subject components* are sub-categories under which marks may be allocated (e.g. “Knowledge of basic concepts” and “Computation”) within a *subject area*.

The appropriate *subject areas* and *subject components* are frequently the same for all grade levels within a *division*. Therefore, it is efficient to define the applicable *subject areas* and *subject components* for each division, and then enable the division defaults to be easily adopted by each class. This is accomplished in different ways for *default* report cards and *custom* report cards.

When using default report cards, provision exists within *Overseer* to define *default subject areas* and *default subject components* for each division. When a new class is defined, the *default subject areas* and *default subject components* may be adopted as a starting set of *subject areas* and *subject components* for the class, based on the division to which the class belongs. These may then be refined to reflect minor differences in the *subject areas* and *subject components* appropriate to particular classes in the same division.

The *default subject areas* and *default subject components* for a division may be modified at any time without affecting the *subject areas* and *subject components* for existing classes in the database. It is only when the *default subject areas* and *default subject components* are invoked for a class that the active *subject areas* and *subject components*, if any, are deleted and replaced by the default ones.

The following data fields characterize each *default subject area* for a division:

- Subject Area Abbreviation:* (mandatory) unique 1-3 character abbreviation for the *subject area*. This field is used to correlate *subject areas* between classes when transferring a student (while preserving the students marks) from one class to another in mid-session.
- Subject Area Description:* (mandatory) description of *subject area* used on student report cards.

The following data fields characterize each *default subject component* for a division:

- Subject Component Abbreviation:* (mandatory) unique 1-3 character abbreviation for the *subject component*. This field is used to correlate *subject components* between classes when transferring a student (while preserving the students marks) from one class to another in mid-session.
- Subject Component Description:* (mandatory) description of *subject component* used on student report cards.

Note: Both the *default subject areas* and *default subject components* are ordered lists whose order must be set explicitly by the user (i.e. they are not sorted alphabetically).

When using *custom* report cards, the *default subject areas* and *default subject components* are not used. Instead, the full description of all *subject areas* and *subject components* is fully specified within the *custom* report card design file (generated by the *Overseer Reports* utility application). These *subject areas* and *subject components* are installed when the design file is imported for a class. Once installed, they cannot be edited (except for *subject categories*, a tier below *subject components*, provided the designer has authorized post-installation editing).

2.11 Organization Sub-Categories

Organizations within *Overseer* may be classified into one of five primary categories: *schools*, *churches*, *medical/professional agencies*, *businesses*, or *other non-profit agencies*. These categories are fixed and cannot be modified by the user.

Some procedures require selecting an organization from a particular one of these primary categories (e.g. documenting the enrolment of a child in a *school* other than the local school). On other occasions (e.g. emergency contacts for students), only affiliations with organizations belonging to certain primary categories (e.g. *churches* and *medical/professional agencies*) are listed.

Within each primary category, the user may designate organization *sub-categories* (e.g. “OACS Elementary”, “Public Elementary” and “Separate Elementary” under the *schools* primary category). These are ordered lists (not alphabetical lists); however, the order cannot be changed once defined, without deleting, then redefining the *sub-categories* and re-classifying all organizations within the respective primary category. New *sub-categories* can, however, be inserted into the ordered list without affecting existing *sub-categories*.

An *organization sub-category* may be used as a filter to select a subset of organizations within a particular primary category.

2.12 Marking Schemes

Marking schemes are used within *Overseer Grades* to fully define the *numeric* and *symbolic* grading schemes used by teachers so that weighted averaging of student grades may be performed. Weighted averaging requires a weight to be assigned to each test or component mark to be averaged. It also requires that all grades be converted to a common grading system (e.g. *per cent*) for weighted averaging. After averaging, an algorithm is needed to convert the averaged marks back into the preferred grading system for representation of those marks on report cards.

For *numeric* marking schemes, all that is needed is the maximum grade (*Max*) attainable. All

grades are converted to per cent simply by multiplying them by $100/Max$.

For *symbolic* marking schemes, each symbolic grade (e.g. 'A-' or 'S') must have an equivalent *per cent* value which can be assigned to it when converting to *per cent*. It must also have an associated range of values (in *per cent*) which can be used to convert back to a symbolic grade after averaging.

Marking schemes are created and maintained via *Overseer Admin* because each marking scheme is likely to be used by several staff members, and there is a need for a common definition of each scheme, for use by all teachers.

These same *marking schemes* may be used implicitly when teachers enter or edit student marks via *Overseer LAN*. However, since these marks are entered as text strings, with no averaging or verification, there is no explicit or implicit reference to the grading system which the teacher is using.

There are two *numeric marking schemes* which are always present. A "%" *marking scheme* is always available for test scores or for reporting end-of-term marks, as integer marks in the range 0 to 100. A "Max" *marking scheme* allows a variable upper limit to the valid marks which can be recorded. This scheme has range 0 to *Max* where the value of *Max* must be specified each time this scheme is used for a test. This scheme is invalid for report card marks. However, new *numeric* schemes, with fixed maximum values for valid marks, may still be defined by users.

The following data fields characterize each *marking scheme*:

<i>Marking Scheme Abbrev:</i>	(mandatory) 1-8 character abbreviation to uniquely identify this marking scheme.
<i>Marking Scheme Description:</i>	(optional) 1-32 character description of this marking scheme for reference purposes.
<i>Marking Scheme Type:</i>	(mandatory) designation of this scheme as being either a <i>numeric</i> or <i>symbolic marking scheme</i> .
<i>Maximum Grade Attainable:</i>	(mandatory) maximum grade which may be assigned to any student when using this marking scheme. This field only applies to <i>numeric marking schemes</i> .

The following data fields must also be defined for each *marking scheme*, for each *division*:

<i>Used for Subject Areas/Components:</i>	(mandatory) designation of whether or not this <i>marking scheme</i> may be used to represent <i>subject area</i> term marks or <i>subject component</i> term marks on report cards for classes in this <i>division</i> . This field must have
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Used for Subject Component Tests:

the value “Yes” or “Yes (default)” for the “%” marking scheme. It has a fixed value of “No” for the “Max” marking scheme. (mandatory) designation of whether (“Yes” or “Yes (default)”) or not (“No”) this marking scheme may be used to represent subject component test scores (within Overseer Grades) for classes in this division. This field must have the value “Yes” or “Yes (default)” for the “%” marking scheme. It has a fixed value of “Yes” for the “Max” marking scheme.

Note: *Marking schemes* are not relevant to *subject category* assessments by teachers, as used by *custom* report cards. However, they are used for *subject area* marks, *subject component* marks and *test* marks in connection with *custom* report cards.

The following data fields must also be defined for each *symbolic grade* of a *symbolic marking scheme*:

<i>Symbol:</i>	(mandatory) 1-3 character <i>symbolic</i> grade.
<i>Description:</i>	(optional) 1-32 character description of this grade.
<i>Nominal Minimum Value:</i>	(mandatory) <i>nominal minimum value</i> (in per cent) associated with this <i>symbolic</i> grade. This is used to convert weighted average marks from per cent to a symbolic grade. See the note below.
<i>Nominal Maximum Value:</i>	(mandatory) <i>nominal maximum value</i> (in per cent) associated with this <i>symbolic</i> grade. This is used to convert weighted average marks from per cent to a symbolic grade. See the note below.
<i>Default Value:</i>	(mandatory) <i>default value</i> (in per cent) associated with this <i>symbolic</i> grade. This is used to convert test scores from a <i>symbolic</i> grade into per cent equivalent grades in order to perform weighted averaging.

Note on Nominal and Actual Grade Ranges

Consider a simple *pass/fail* marking scheme with only two available symbolic grades: *P* (pass) and *F* (fail). If these have associated per cent equivalent grade ranges of 50 - 100 and 0 - 49 respectively, then 50 and 0 are examples of *nominal minimum values* while 100 and 49 are examples of *nominal maximum values*. However, for purposes of converting from per cent equivalent marks into this *pass/fail* marking scheme, all marks greater than or equal to 49.5 % will be assigned a *P* grade. The *actual minimum value* for the symbolic grade *P* is therefore 49.5 (i.e. the mid-value between 49 and 50).

3. DIRECTORY: CURRENT INFORMATION

This chapter summarizes the current information within *Overseer* which pertains to persons, families and organizations other than the local school.

3.1 Families

Whenever the term *family* is used within *Overseer* it is assumed to refer to a residential *family*, i.e. one or more persons who share accommodation at a fixed address. In the case of students especially, it is assumed that each student's residential address is the same as that of the *family* to which the student is assigned. There may be instances where a child's *family* changes (e.g. if his parents are home on furlough for a few months of the year). Other scenarios (e.g. where a child moves from one home to another every week or two because his parents are separated) are harder to accommodate and may require designating one or the other as the residential *family*.

Relationships between children and adults (e.g. parents, grandparents) are managed independently so that the correct relationships may be retained even in instances where a child's parents are apart from their children.

The following information is managed for each residential family:

<i>Surname(s):</i>	(mandatory) <i>surname(s)</i> of head(s) of the household and/or the parent(s)/guardian(s) of children in the home. This could be two <i>surnames</i> (e.g. "Smith - Caruthers") if the husband and wife have different <i>surnames</i> .
<i>First Name(s):</i>	(mandatory) <i>first name(s)</i> (e.g. "John & Sue") of head(s) of the household and/or the parent(s)/guardian(s) of children in the home. These should be names that teachers could use when addressing the parents of students.
<i>Qualifier:</i>	A unique identifier (e.g. "Acton") which distinguishes one <i>family</i> from another in the case where two or more <i>families</i> have identical <i>first names</i> and <i>surnames</i> . This is used on <i>family</i> lists within <i>Overseer</i> but not on address labels or reports (as a general rule) which might go to parents.
<i>Children in Household:</i>	This is a data field which summarizes the <i>life-stage</i> of a <i>family</i> with respect to the children within the home. The options are: <i>unknown</i> , <i>no children</i> , <i>young children</i> , <i>post-elementary</i> and <i>empty nest</i> . This field may have a range of values for the purpose of a selection constraint when choosing <i>families</i> from a list (either filtered or unfiltered).
<i>Cell Phone:</i>	(optional) <i>cell phone</i> number at which a parent, guardian or head of household can normally be reached by cellular phone.
<i>Email:</i>	(optional) <i>email</i> address for family correspondence; for reference

only.

Addressee: (optional) *addressee* used on mailing labels generated for this *family*. A default *addressee* is generated automatically from the *family surname(s)* and *first name(s)*. This can be manually edited.

Mail Status: (mandatory) *mail status* for family indicating the level of receptivity to mailings from the school. The options are: *no mail*, *essential mail only*, *include promotions* and *include fund-raising*. The *mail status* field may have a range of values for the purpose of a selection constraint when choosing *families* from a list (either filtered or unfiltered).

The next four read-only status fields take a while to populate and must therefore be activated or de-activated explicitly (by clicking on the group box in which they appear):

Student(s): (automatic) box which is checked if there is one or more *student* of the local school in the family on the active date.

Prospect(s): (automatic) box which is checked if there is one or more prospective student (i.e. a *prospect*) for the local school in the family on the active date.

Committee(s): (automatic) box which is checked if there is one or more adult in the family who currently serves on a *committee* of the local school.

Relative(s): (automatic) box which is checked if the family includes one or more adult relatives (other than parents or guardians) of a local school student.

Continuing with family data fields:

List of Adults: (linked) list of all adults who are currently members of this family. Adults can be added to or deleted from this list by the user.

List of Children: (linked) list of all children who are currently members of this family. Children can be added to or deleted from this list by the user.

Principle Address: (optional) residential *address* of the family, including *phone* and *fax* numbers; this information is always used by screen displays and reports.

Alternate Address: (optional) alternate residential *address* of the family, including *phone* and *fax* numbers; this is intended as an optional address for temporary use (e.g. when a family gives notice of a change of address on a future date). Use the comments field to explain the significance of this address.

Affiliations: (linked) list of organizations with which the family is associated (e.g. “member” of “John Knox CRC”). New affiliations can be

added to or deleted from this list by the user. The *affiliation* must be selected from a list which is dependent upon the type of organization as follows:

School: *(unknown), advocate, agent, client, representative, supporter and volunteer*

Church: *(unknown), adherent, member, representative and volunteer*

Med/Prof: *(unknown), adherent, advocate, agent, client, member and patient*

Business: *(unknown), agent, client and representative*

Non-Profit: *(unknown), adherent, advocate, agent, client, member and representative*

Groups: (linked) list of *groups* (e.g. "School Society") of which the family is a member. *Groups* can be added to or deleted from this list by the user.

General Notes: list of (optional) *general notes* identified by titles and dates which apply to the family. *General notes* can be added to or deleted from this list by the user. Each note can optionally be designated as *Public*. This designation can later be used to determine which notes to print on *Family Profile* reports.

Hot-Links: *Adult:* Adult detail information for *adult family members*
Child: Child detail information for *child family members*
Organization: Organization detail information for *organizations* with which family is affiliated
Group: Group detail information for *groups* of which the family is a member

Filters: Any one of the following filter subsets may be selected for family lists:

(All families)
Clientele of organizations in group:
Clientele of organization:
Families in group:
Families of adults in group
Families of alumni
Families of children in group:
Families of clientele of organization:
Families of committee members:
Families of persons in group:
Families of prospects in division:
Families of prospects in grade:

Families of staff
Families of staff of organization:
Families of students
Families of students in class:
Families of students in division:
Families of students in grade:
Families of students in group:
Families of teachers
Families with children in division:
Families with children in grade:

Constraints: One or more of the following selection constraints may be applied to family lists:

Specific substring (e.g. street name) in address
City
State/Province
Country
ZIP/Postal Code (or prefix thereof)
Range of Mail Status
Range of Life-Stage

3.2 Children

The reason for maintaining separate designations for *children* and *students* within *Overseer* is to separate the information which pertains to enrolment in the local school from more general information which applies equally to *students* and *non-students* alike. The *child* entity enables the school to acquire information about prospects long before they are of age to attend the local school, and then have their names appear automatically as prospects for the relevant grade and session, for the appropriate future session. In this way, *child* information can remain in the database and simply be supplemented by additional *student* information when the *child* is enrolled.

Within *Overseer*, a person must always have *child* status (as opposed to *adult* status) at least until he or she is beyond an age (or grade level) to be eligible for enrolment in the local school. Once a *child* is beyond this age (or grade level) he or she should still retain *child* status until the designated maximum number of years for retaining class history elapses (see School | Preferences). After this period of time, class history for any classes which the *child* may have attended will be deleted, and the *child* will be promoted to *adult* status, when *Year-End Processing* is performed at the end of the appropriate year.

If a *child* who was never enrolled in the local school should leave the school (e.g. because of a family move) then the *child's* name, and all family information could be safely deleted.

Overseer will not allow explicit deletion of a *child* who is enrolled for any period of time in the local school, whether past, present or future. The *child's* enrolment period could always be explicitly deleted, in which case there would be no trace of the *child's* enrolment history in the local school database. If the *child* had actually attended classes in the past, then his name would disappear from the list of students for any active date when he was actually in attendance because his enrolment period had been deleted.

A secretary may be tempted to prematurely delete a *child's* enrolment information when the *child* leaves the local school, but should be discouraged from doing so. One reason may be to reduce the apparent “clutter” caused by so many names appearing in the *child* list for the default filter (*All Children*). The answer to this dilemma is to select a different filter (e.g. *All Students*) to display only students as of the active date.

A *child's* address, phone number and residential family information is maintained under the *family* entity. If he is (or was) a student in the local school, then his school-related information will be stored under the *student* entity. Information which is recorded under the *child* entity includes the following:

<i>Child's Name:</i>	Name of <i>child</i> , including (mandatory) <i>last name</i> , (mandatory) <i>first name</i> , (optional) <i>middle name</i> and (mandatory) <i>chosen name</i> .
<i>Qualifier:</i>	A unique identifier (e.g. “Skipper”) which distinguishes one <i>child</i> from another in the case where two or more <i>children</i> have identical <i>first names</i> , <i>middle names</i> and <i>last names</i> . This is used on <i>child</i> lists within <i>Overseer</i> but not on address labels, report cards or other reports (as a general rule) which might go to parents.
<i>Gender:</i>	(mandatory) gender of <i>child</i>
<i>Date of Birth:</i>	(optional) birth date of <i>child</i>
<i>Addressee:</i>	(optional) addressee name to be used on mailing labels for <i>child</i> . This is set to a default name but may be edited.
<i>Mail Status:</i>	(mandatory) <i>mail status</i> for <i>child</i> indicating the level of receptivity to mailings from the school. The options are: <i>no mail</i> , <i>essential mail only</i> , <i>include promotions</i> and <i>include fund-raising</i> . The <i>mail status</i> field may have a range of values for the purpose of a selection constraint when choosing <i>children</i> from a list (either filtered or unfiltered).
<i>Phone:</i>	(optional) <i>child's phone number</i> ; set to the family <i>phone number</i> by default, but may be edited independently. This could be a cell phone number or an alternate home phone number.
<i>Email:</i>	(optional) <i>child's email</i> address; for reference only.
<i>Prospect Status:</i>	(semi-automatic) <i>prospect status</i> of <i>child</i> . This field is checked when a <i>child</i> is first entered into the database. However, it is subsequently cleared whenever the <i>child</i> is enrolled in the local school with a present, future or unspecified enrolment <i>End Date</i> .

The child's *prospect status* can also be edited by the user.

School Attended: (linked) name of school in which child is enrolled as of the active date. This may be the local school, another school or an (unknown) school for which an enrolment period has been entered for the child. If the school information is known to be reliable, it may be designated as confirmed.

Grade: (automatic) *grade* in which the child is enrolled as of the active date in the local (or another) school.

Enrolment Periods: (optional) list of recorded *enrolment periods* for which the child was, is or will be enrolled in the local school and/or other schools. These *enrolment periods* may be edited, deleted or new periods may be added at any time. Each *enrolment period* must include at least one of: (a) a *start date* and *grade level* or (b) an *end date* and *grade level*. The child is assumed to graduate from one grade level to the next at a designated *grade change date* (e.g. "Aug 1") each year, for the extent of the *enrolment period*. If the child skips or repeats a grade, simply enter the valid enrolment *end date* for the first *enrolment period*, then enter a new *enrolment period*, starting at the appropriate new *start date* and *grade level*. A *start date* and *grade level* which is known to be accurate can be confirmed as such (and cannot be changed without first unconfirming it). Similarly, an *end date* and *grade level* which is known to be accurate can be confirmed as such (and cannot be changed without first unconfirming it).

Grade Change Day: (mandatory) date each year when the child is assumed to graduate from one grade level to another within a specified enrolment period. A default *grade change date* typically applies to most children. There may, however be occasions when it might be changed for a particular enrolment period (e.g. when a child's history is recorded for a period when attending a school in the opposite hemisphere to the local school).

Adult Relatives: (linked) name of *adult relative* and relationship of adult to child. New relationships can be added to or deleted from this list by the user. The available options depend upon the gender of the adult as follows:

Male Adult Options

(Unknown)
 Baby-sitter
 Brother
 Co-resident
 Cousin

Female Adult Options

(Unknown)
 Aunt
 Baby-sitter
 Co-resident
 Cousin

<i>Father</i>	<i>Father's partner</i>
<i>Father's partner</i>	<i>Friend</i>
<i>Friend</i>	<i>Grandmother</i>
<i>Grandfather</i>	<i>Great-grandmother</i>
<i>Great-grandfather</i>	<i>Guardian</i>
<i>Guardian</i>	<i>Landlady</i>
<i>Landlord</i>	<i>Mother</i>
<i>Mother's partner</i>	<i>Mother's partner</i>
<i>Neighbour</i>	<i>Neighbour</i>
<i>Relative</i>	<i>Relative</i>
<i>Step-father</i>	<i>Sister</i>
<i>Tenant</i>	<i>Step-mother</i>
<i>Uncle</i>	<i>Tenant</i>
<i>Visitor</i>	<i>Visitor</i>

Affiliations: (linked) list of *organizations* with which the child is associated (e.g. "Patient" of "Dr. J. Little"). New *affiliations* can be added to or deleted from this list by the user. The *affiliation* must be selected from a list which is dependent upon the type of organization as follows:

School: (*unknown*), *advocate*, *agent*, *client*, *graduate*, *leader*, *representative*, *student*, *supporter* and *volunteer*

Church: (*unknown*), *adherent*, *member*, *representative* and *volunteer*

Med/Prof: (*unknown*), *adherent*, *advocate*, *agent*, *client*, *member*, *patient*, *representative*, *supporter* and *volunteer*

Business: (*unknown*), *agent*, *client* and *representative*

Non-Profit: (*unknown*), *adherent*, *advocate*, *agent*, *client*, *leader*, *member*, *representative*, *supporter* and *volunteer*

Groups: (linked) list of *groups* (e.g. "School Society") of which the child is a member. *Groups* can be added to or deleted from this list by the user.

General Notes: list of (optional) *general notes* identified by titles and dates which apply to the child. *General notes* can be added to or deleted from this list by the user. Each note can optionally be designated as *Public*. This designation can later be used to determine which notes to print on *Child Profile* reports.

Hot-Links: *Family:* Family detail information for *child's* family
Student: Student detail information for *child*

School: School detail information for (non-local) *school* attended by child during enrolment period
Adult: Adult detail information for *relative* of child
Organization: Organization detail information for *organization* with which child is affiliated
Group: Group detail information for *group* of which the child is a member

Filters: Any one of the following filter subsets may be selected for lists of children:

(All children)
(All prospects)
(All students)
(Deceased children)
Children attending school:
Children in division:
Children in family:
Children in grade:
Children in group:
Children of families in group:
Children of parents in group:
Clientele of organizations in group:
Clientele of organization:
Prospects in division:
Prospects in grade:
Prospects in group:
Prospects of families in group:
School attended is in group:
Students in class:
Students in division:
Students in family:
Students in grade:
Students in group:
Students in homeroom:
Students of families in group:

Constraints: One or more of the following selection constraints may be applied to lists of children:

Specific substring (e.g. street name) in address
City
State/Province
Country

ZIP/Postal Code (or prefix thereof)
Range of Mail Status
Range of age
Range of Dates of Birth (year, month and day)
Range of Birthdays (month and day)
Attendance Period, Status (Absent, Absent or Excused, Enrolled, Excused, Late, Not Enrolled, Present, Present or Excused) and Range of Days or Times
Gender (Males only, Females only, or both)

3.3 Adults

Within *Overseer*, *adults* are persons beyond the age of enrolment in the local school. An *adult's* address, phone number and residential family information is maintained under the *family* entity. Information which is recorded under the *adult* entity includes the following:

<i>Adult's Name:</i>	Name of <i>adult</i> , including (mandatory) <i>last name</i> , (mandatory) <i>first name</i> , (optional) <i>middle name</i> and (mandatory) <i>chosen name</i> .
<i>Qualifier:</i>	A unique identifier (e.g. "Mack") which distinguishes one <i>adult</i> from another in the case where two or more <i>adults</i> have identical <i>first names</i> , <i>middle names</i> and <i>last names</i> . This is used on <i>adult</i> lists within <i>Overseer</i> but not on address labels or other reports.
<i>Gender:</i>	(mandatory) gender of <i>adult</i>
<i>Marital Status:</i>	(mandatory) <i>marital status</i> (<i>unknown</i> , <i>single</i> , <i>married</i> , <i>divorced</i> , <i>separated</i> , <i>widowed</i> , <i>common-law</i> or <i>deceased</i>).
<i>Addressee:</i>	(optional) addressee name to be used on mailing labels for <i>adult</i> . This is set to a default name but may be edited.
<i>Mail Status:</i>	(mandatory) <i>mail status</i> for <i>adult</i> indicating the level of receptivity to mailings from the school. The options are: <i>no mail</i> , <i>essential mail only</i> , <i>include promotions</i> and <i>include fund-raising</i> . The <i>mail status</i> field may have a range of values for the purpose of a selection constraint when choosing <i>adults</i> from a list (either filtered or unfiltered).
<i>Phone:</i>	(optional) <i>adult's phone number</i> ; set to the family <i>phone number</i> by default, but may be edited independently.
<i>Other #:</i>	(optional) <i>adult's other phone number</i> (e.g. cell, pager or mobile contact number).
<i>Email:</i>	(optional) <i>adult's email</i> address; for reference only.

The following four read-only data fields indicate the affiliation of the *adult* with the local school:

<i>Parent:</i>	(automatic) box which is checked if the <i>adult</i> is the <i>parent</i> of one or more students enrolled in the school on the active date.
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- Grandparent:* (automatic) box which is checked if the *adult* is the *grandparent* or *great-grandparent* of one or more students enrolled in the school on the active date.
- Alumnus:* (automatic) box which is checked if the *adult* is an *alumnus* of the local school.
- Staff:* (automatic) box which is checked if the *adult* is a *staff* member of the local school.

Continuing with adult data fields:

- Place(s) of Work:* (linked) *name of organization* and *job title* of adult's place(s) of employment. The adult's primary place of work is uniquely identified as such. *Places of work* can be added to or deleted from this list by the user. The positions of staff in the local school will automatically appear here.
- Work Contacts:* (mandatory) *addressee*, (mandatory) *mail status*, (optional) *phone number* and m (optional) *email* addresses at work are recorded here for each *place of work*; these are used for reference only.
- Spouse:* (linked) name of adult's *spouse*, if married (selected from the adult directory).
- Child Relatives:* (linked) name of *child relative* and relationship of child to adult. New relationships can be added to or deleted from the list by the user. The available options depend upon the gender of the *child* as follows:

Male Child Options

(Unknown)
Brother
Child under care
Co-resident
Cousin
Friend
Grandson
Great-grandson
Host's son
Landlord's son
Neighbour
Nephew
Partner's son
Relative
Son
Step-son

Female Child Options

(Unknown)
Child under care
Co-resident
Cousin
Daughter
Friend
Granddaughter
Great-granddaughter
Host's daughter
Landlord's daughter
Neighbour
Niece
Partner's daughter
Relative
Sister
Step-daughter

*Tenant's son
Ward*

*Tenant's daughter
Ward*

Affiliations: (linked) list of *organizations* with which the adult is associated (e.g. “Adherent” of “Oak Street Baptist Church”). New *affiliations* can be added to or deleted from this list by the user. The *affiliation* must be selected from a list which is dependent upon the type of organization as follows:

School: *(unknown), advocate, agent, client, director, graduate, leader, representative, student, supporter and volunteer*

Church: *(unknown), adherent, deacon, elder, member, representative and volunteer*

Med/Prof: *(unknown), adherent, advocate, agent, client, director, member, patient, representative, supporter and volunteer*

Business: *(unknown), agent, client, director and representative*

Non-Profit: *(unknown), adherent, advocate, agent, client, director, leader, member, representative, supporter and volunteer*

Groups: (linked) list of *groups* (e.g. “School Society”) of which the adult is a member. *Groups* can be added to or deleted from this list by the user.

Committees: (linked) list of *committees* of which the adult is currently a member, together with the office held and range of dates served. Historic membership on *committees* is also retained within the database. New *committee* membership records can be added to or deleted from this list by the user.

General Notes: list of (optional) *general notes* identified by titles and dates which apply to the adult. *General notes* can be added to or deleted from this list by the user. Each note can optionally be designated as *Public*. This designation can later be used to determine which notes to print on *Adult Profile* reports.

Hot-Links: *Family:* Family detail information for *adult's* family
Teacher: Teacher detail information, if the *adult* is a teacher in the local school as of the active date
Work Contact: Organization detail information for the *adult's* primary employer, if currently employed
Child: Child detail information for *relative* of adult

Organization: Organization detail information for an *organization* with which adult is affiliated
Group: Group detail information for a *group* of which the adult is a member
Committee: Committee detail information for a *committee* of which the adult is a member

Filters: Any one of the following filter subsets may be selected for lists of adults:

(All adults)
(All alumni)
(All grandparents)
(All other relatives)
(All parents)
(All staff)
(All teachers)
(Deceased adults)
Adults in family:
Adults in group:
Adults of families in group:
Adults with marital status:
Alumni in group:
Clientele of organizations in group:
Clientele of organization:
Emergency contacts for class:
Grandparents of children in group:
Grandparents of students in class:
Grandparents of students in division:
Grandparents of students in grade:
Grandparents of students in group:
Grandparents of students
Historic members of committee:
Members of committee:
Other relatives of children in group:
Other relatives of students in group:
Other relatives of students
Parents of children in division:
Parents of children in grade:
Parents of children in group:
Parents of prospects
Parents of prospects in division:
Parents of prospects in grade:
Parents of prospects in group:

Parents of students
Parents of students in class:
Parents of students in division:
Parents of students in grade:
Parents of students in group:
Staff of organization in group:
Staff of organization:

Constraints: One or more of the following selection constraints may be applied to lists of adults:

Specific substring (e.g. street name) in address
City
State/Province
Country
ZIP/Postal Code (or prefix thereof)
Range of Mail Status
Employment Status (all, unemployed, employed, employed as:)
Gender (Males only, Females only, or both)

3.4 Groups

Groups within *Overseer* provide a convenient mechanism for selecting and maintaining a precise subset of children, adults, families and/or organizations for a particular purpose (e.g. printing mailing labels, printing participant lists, or export of names and addresses to a spreadsheet application). Examples of *groups* are: school clubs, sports teams, special needs students, school society members, financial supporters and parent drivers for school events.

When a *group* is first created it must be assigned a unique *group name* for identification purposes, and the user must indicate which of the following are allowed to be members of the *group*: *families, adults, children* and *organizations*. The *group* will then appear as an eligible *group* for membership by the approved entity types (i.e. *families, adults, children* and *organizations*) via their respective detail screens. A *group* may be created, deleted or edited at any time, including the choice of entity types which can be members of the *group*.

Each *group* has an (optional) list of *general notes* identified by titles and dates which apply to the group. *General notes* can be added to or deleted from this list by the user.

Quick methods exist for *adding, deleting* or *retaining* members of a *group*. This is best illustrated by the example of a particular entity type: *children*. The methodology illustrated below for *children* is equally applicable to *adults, families* and *organizations*.

Example: A Group of Children

One or more *children* may be *added to*, *deleted from*, or *retained in* a *group* by selecting their names from a list of *children*. Filters and/or constraints may be used to preselect a subset of *children*. Then, by holding down the *Ctrl+Shift* keys and clicking names with the mouse, a particular subset of *children* may be selected. Alternatively a contiguous range of names may be selected by holding down the *Shift* key while clicking with the mouse on the first and last names in the desired range.

The above selection options may be used to *add children* to a *group*, if their names are not already in the *group*. It may also be used to *delete children* from the *group*, if they are currently in the *group*. The *retain* option allows only those *children* who are in the newly selected set to be retained in the *group*, provided they are already in the *group*; all other *children* will be deleted.

With the above options, it is easy to construct a *group* which is the *complement* of a subset of children selected via the filters or constraints. For example, suppose one wants a list of all students in the local school who are not in the junior division. This may be done by creating a new *group* (e.g. “Students not in junior division”), then *adding* all students to the *group* by using the “(All students)” filter. As a second step, *delete* all students from the *group* who are members of the *junior* division by selecting the filter “Students in division: Junior”. The resulting names of children in the *group* will include only those children who are students in the local school but are not in the junior division.

As a further step, using the group “Students not in junior division”, one could print a list of names and addresses for this precise group of students by selecting the *Session / Student* menu option, using the filter “Students in group: Students not in junior division” and using the *Print* button to select the desired report: *Student Address List*. Before printing the report, a custom title could be assigned (e.g. “Students eligible to attend public speaking contest”).

When the *group* is no longer relevant, simply delete it. If it is out-of-date, simply delete all children from the *group*, then regenerate it by the original procedure.

Group membership is part of the directory of *current* information. This means, for example, that, when a new student is added to grade 8 after the *group* “Students not in junior division” was first created, his name will not be in the *group*, unless explicitly added. Of course, assignment of students to *groups* could be done manually as part of the enrolment procedure.

Hot-Links: *Child:* Child detail information for *group member*
 Adult: Adult detail information for *group member*
 Family: Family detail information for *group member*
 Organization: Organization detail information for *group member*

Filters: (All groups)

Constraints: None

3.5 Committees

Committees within *Overseer* are always assumed to be comprised of *adults*. Their members are therefore selected from the *adult directory*.

The data fields recorded for a *committee* are the following: a (mandatory) unique *Committee Name* and (linked) list of *committee members*, *position held* and *start date* and *end date* of a membership period. In the event that a member assumes a different *position*, on the same *committee*, as of a particular date, this can be indicated by simply making two membership records for the same person, with concurrent *date ranges* and different *positions* for each membership period.

Committee members may have an unspecified *start date* or *end date* of their term, if unknown. If their term of office encompasses the current date, then they will appear on the list of *current members*. Otherwise their names will only appear in the list of *historic members*. The latter information could be useful in tracking the past record of service on committees for an *adult*. This could be useful when recruiting new *committee members*.

Each *committee* has a (linked) list of *general notes* identified by titles and dates which apply to the *committee*. *General notes* can be added to or deleted from this list by the user.

Mailing labels or a list of committee members' names and addresses can be easily generated by selecting the *Directory / Adults* menu option, selecting the filter "Members of committee: ..." (or "Historic members of committee: ..."), clicking the *Print* button and selecting the desired report.

Hot-Links: *Adult:* Adult detail information for *committee member*

Filters: (All Committees)

Constraints: None

3.6 Organizations

Every school has connections not only with families, adults and children, but also with *organizations* of various types. In order to contact parents during a school day, it is necessary to know their *place of work* and contact phone number. In emergencies, it is necessary to contact a student's or teacher's *family doctor*. Some students may be receiving professional help from

outside *clinics or agencies*. *Businesses*, especially employers of students' parents are potential *financial supporters* of the school, or sources of bargain prices for goods and services. It is helpful to know the *church affiliations* of students and their families, in order to effectively promote the school through the *local churches*. There may also be reason to keep enrolment records of students and prospects for periods when they attended *schools* other than the local school. For these and other reasons, *Overseer* supports documentation of core *organizations* associated with the school and its supporting community.

Within *Overseer*, *organizations* are classified into 5 *primary categories* as follows:

<i>Schools:</i>	Schools, colleges, universities, educational associations or other <i>organizations</i> (including pre-schools) whose primary role is the delivery of educational services to children, adults, families and/or <i>organizations</i> .
<i>Churches:</i>	Churches, religious <i>organizations</i> or associations whose primary concern is the spiritual development, moral training and personal nurture of individuals and families in the context of a community of faith.
<i>Medical/Professional Agencies:</i>	Doctors, hospitals, clinics, professionals, agencies or associations whose primary role is the provision of medical, dental or other professional services to individuals, families and/or schools, including non-medical services.
<i>Businesses:</i>	For-profit businesses, associations or other <i>organizations</i> (including self-employed individuals) which are not schools, churches or medical or professional agencies.
<i>Other Non-Profit Agencies:</i>	Government agencies, charitable institutions, associations or other non-profit <i>organizations</i> which are not schools, churches, medical or professional agencies.

There is a global menu option (*Directory / All Organizations*) which lists all *organizations*, irrespective of classification. Sometimes this is most convenient (e.g. when logging information about the employers of a student's parents).

On other occasions (e.g. when recording a family's *church affiliation*), it is more convenient to select from an existing short list of *organizations* (e.g. Churches) from one primary classification

only. For this reason a filter is provided for listing *organizations* based on *primary classification*.

Separate menu options are also provided for each type of *organization* (i.e. *schools, churches, medical/professional agencies, businesses and other non-profit agencies*). Within each of these, a filter (e.g. “*Medical/Professional Agencies of type:...*”) exists to allow the user to select a subset of *organizations* by sub-categories (e.g. “*Ambulance*”, “*Dentist*”, “*Hospital*”) within each primary category. These sub-categories may be created, edited or deleted by the user, as desired for the purposes of the local school.

The next few paragraphs provide detailed information which is applicable to all *organizations*. These are followed by numbered sections which provide additional information which is applicable to specific *primary organization categories*.

Data fields which may be recorded for each *organization* are the following:

<i>Organization Name:</i>	(mandatory) name of <i>organization</i>
<i>Qualifier:</i>	An (optional) unique identifier (e.g. “ <i>Local</i> ”) which distinguishes one <i>organization</i> from another in the case where two or more <i>organizations</i> have identical <i>names</i> . This is used on <i>organization</i> lists within <i>Overseer</i> but not on address labels or other reports (as a general rule).
<i>Organization Type:</i>	(mandatory) <i>primary organization category</i> (or “ <i>unknown</i> ” type) to which the <i>organization</i> belongs
<i>Organization Sub-category:</i>	(mandatory) <i>sub-category</i> (or “ <i>Other</i> ”) to which this <i>organization</i> belongs
<i>Mail Status:</i>	(mandatory) <i>mail status</i> for <i>organization</i> indicating the level of receptivity to mailings from the school. The options are: <i>no mail, essential mail only, include promotions</i> and <i>include fund-raising</i> . The <i>mail status</i> field may have a range of values for the purpose of a selection constraint when selecting <i>organizations</i> from a list (either filtered or unfiltered).
<i>Email:</i>	(optional) <i>organization’s email</i> address; for reference only.
<i>Principle Address:</i>	(optional) residential <i>address</i> of the organization, including <i>phone</i> and <i>fax</i> numbers; this information is always used by screen displays and reports.
<i>Alternate Address:</i>	(optional) alternate residential <i>address</i> of the organization, including <i>phone</i> and <i>fax</i> numbers; this is intended as an optional address for temporary use (e.g. when a organization gives notice of a change of address on a future date). Use the comments field to explain the significance of this address.

Staff Names: (linked) *names of staff members* of this organization. Staff members can be added or deleted at any time.

Staff Positions: (optional) *positions of staff members* within organization. These may be edited by the user at any time.

Staff Addressees: (mandatory) *addressee* names by which staff members should be addressed (at their place of work) in any correspondence from the school.

Mail Status: (mandatory) *mail status* for *staff member* indicating the level of receptivity to mailings from the school. The options are: *no mail, essential mail only, include promotions* and *include fund-raising*. The *mail status* field may have a range of values for the purpose of a selection constraint when choosing *adults* from a list (either filtered or unfiltered).

Phone: (optional) staff member's *phone number* at work; set to the organization's *phone number* by default, but may be edited independently.

Email: (optional) staff member's *email* address at work; for reference only.

Clientele Names: (linked) *names of adults, children and families* affiliated with this organization. *Clientele* can be added or deleted at any time. *Clientele* are understood to be persons and families who are clients, volunteers, supporters or members of an organization as opposed to *staff* who are typically hired by the organization.

Clientele Affiliations: (mandatory) *nature of association* of adults, children and families with this organization. These may be edited at any time.

Groups: (linked) list of *groups* (e.g. "Financial Supporters") of which the organization is a member. *Groups* can be added to or deleted from this list by the user.

General Notes: list of (optional) *general notes* identified by titles and dates which apply to the organization. *General notes* can be added to or deleted from this list by the user. Each note can optionally be designated as *Public*. This designation can later be used to determine which notes to print on *Organization Profile* reports.

Hot-Links: The following hot-links apply to lists of *All Organizations* as well as to lists of organizations of each of the *primary types* (i.e. *schools, churches, medical/professional agencies, businesses* and *other non-profit agencies*)

Staff Member: Adult detail information for *staff member* of organization.

Adult: Adult detail information for *affiliated adult*
Child: Child detail information for *affiliated child*
Family: Family detail information for *affiliated family*
Group: Group detail information for *group of which organization is a member*

Filters: Any one of the following filter subsets may be selected for lists of *All Organizations*, but not for lists of organizations of each *primary type* (selected via separate menu options or tool-bar buttons):

(All organizations)
Employers of adults in group:
Organizations of unknown type
Organizations with adult clients in group:
Organizations with child clients in group:
Organizations with clientele in group:
Organizations with family clients in group:
Organizations with student clients in group:
Organizations in group:

Constraints: One or more of the following selection constraints may be applied to lists of *All Organizations* as well as to lists of organizations of each of the *primary types* (i.e. *schools, churches, medical/professional agencies, businesses and other non-profit agencies*):

Specific substring (e.g. street name) in address
City
State/Province
Country
ZIP/Postal Code (or prefix thereof)
Range of Mail Status

3.6.1 Schools

Organizations within *Overseer* which are broadly classed as *schools* include schools, colleges, universities, educational associations or other organizations (including pre-schools) whose primary role is the delivery of educational services to children, adults, families and/or organizations.

The list of *schools* maintained by *Overseer* should not include the local school which is treated uniquely within the application. For example, students and families of students within *Overseer* are understood to be clientele of the local school. The local school's *staff* is managed uniquely via the *School | Reference | Staff* tabsheet and via *teacher* lists.

Schools, other than the local school, play a special role within *Overseer* via the *Child / Schools* tabsheet. The fact that a child (e.g. a prospect for the local school) is currently enrolled in another school in the community can be recorded, in which case the recorded school must be an organization of the *school* primary category. Both the school name and the student's grade level must be recorded. The child's name will then appear whenever a prospect filter (e.g. *all prospects*, *prospects in grade:...* or *prospects in division:...*) is used to generate a list of children.

Generic schools (e.g. *correspondence school*, *home school*, *none*, *nursery school* or *unknown school*) also appear in the list of schools in which a child can be enrolled. These do not require linkage to a particular *school* organization within the *Overseer* database. These allow tracking of children who are taking a correspondence program, are being home-schooled, are not receiving any schooling, are enrolled in a nursery school or are attending a regular, but unknown school.

One type of generic school, an *unknown school*, can be used effectively within *Overseer* to pre-enrol a child (for the purpose of tracking prospects), long before the child is of age to attend the local school. As soon as a child is born into a family within the community served by the local school, it is feasible to enter the child's name and birth date in the *Overseer* database and enrol the child in an *unknown school* on the date (and at the appropriate grade level) when the child would normally be eligible to enter the lowest grade of the school. In this way the child's name will appear as a prospect at the appropriate grade level when eligible for actual enrolment in the future. When the child is actually enrolled in the local (or other) school, simply change the school name from *unknown* to the name of the local (or other) school.

The only *clientele* displayed for a school are those who have been explicitly designated as such by the user through the *Child / Affiliations* tabsheet or the *Organization / Clientele* tabsheet.

The *data fields*, *hot-links* and *constraints* which may be applied to *schools* are the same as those for *all organizations* as detailed in section 3.6 above. However, the *filters* are unique, as described below:

Filters: Any one of the following filter subsets may be selected for school lists:

(All schools)

Employers of adults in group:

Schools in group:

Schools of type:

(type refers to user-defined sub-categories)

Schools with clientele in group:

3.6.2 Medical & Professional Services

Medical and professional organizations within *Overseer* are those doctors, hospitals, clinics,

professionals, agencies or associations whose primary role is the provision of medical, dental or other professional services to individuals, families and/or schools, including non-medical services.

This category of organization is primarily used within *Overseer* to keep track of emergency contacts and *professional support agencies* for students and staff. Student and staff emergency information includes a list of all *affiliations* with *medical/professional agencies* as well as *churches*.

Note that *affiliations* always relate to an *organization*. In the case where a student's family doctor is not a member of a clinic or other organization, it may be necessary to treat the doctor as a self-employed person and represent his practice within *Overseer* as an organization under the doctor's name.

The *data fields*, *hot-links* and *constraints* which may be applied to *medical and professional organizations* are the same as those for *all organizations* as detailed in section 3.6 above. However, the *filters* are unique, as described below:

Filters: Any one of the following filter subsets may be selected for *medical and professional organization* lists:

(All medical/prof agencies)

Employers of adults in group:

Medical/prof agencies in group:

Medical/prof agencies of type: (type refers to user-defined sub-categories)

Medical/prof's with clientele in group:

3.6.3 Churches

The primary category, *churches*, as used within *Overseer*, includes churches, religious organizations or associations whose primary concern is the spiritual development, moral training and personal nurture of individuals and families in the context of a community of faith.

This category of organization is primarily used within *Overseer* to keep track of emergency contacts for students and staff. Student and staff emergency information includes a list of all *affiliations* with *churches* as well as *medical/professional agencies*.

The *data fields*, *hot-links* and *constraints* which may be applied to *churches* are the same as those for *all organizations* as detailed in section 3.6 above. However, the *filters* are unique, as described below:

Filters: Any one of the following filter subsets may be selected for lists of *churches*:

(All churches)

Employers of adults in group:

Churches in group:

Churches of type:

(type refers to user-defined sub-categories)

Churches with clientele in group:

3.6.4 Businesses

Businesses, as a primary category of organizations within *Overseer*, refers to for-profit businesses, associations or other organizations (including self-employed persons) which are not schools, churches, or medical or professional agencies.

They are used primarily to keep track of *emergency contacts* for parents of students at their *places of work*. Most employers are likely to be *businesses*, although employers could belong to any of the primary categories of organizations.

Businesses are also key prospects for financial support and sources of goods and services needed by the school.

The *data fields*, *hot-links* and *constraints* which may be applied to *businesses* are the same as those for *all organizations* as detailed in section 3.6 above. However, the *filters* are unique, as described below:

Filters: Any one of the following filter subsets may be selected for lists of *businesses*:

(All businesses)

Employers of adults in group:

Businesses in group:

Businesses of type:

(type refers to user-defined sub-categories)

Businesses with clientele in group:

3.6.5 Other Non-Profit Agencies

Non-profit agencies within *Overseer* includes government agencies, charitable institutions, associations or other non-profit organizations which are not schools, churches, or medical or professional agencies.

The government agency with jurisdiction over the local school must be a member of this category. Otherwise it is just a useful category for non-profit organizations in general.

The *data fields*, *hot-links* and *constraints* which may be applied to *non-profit agencies* are the same as those for *all organizations* as detailed in section 3.6 above. However, the *filters* are unique, as described below:

Filters:

Any one of the following filter subsets may be selected for lists of *non-profit agencies*:

(All non-profit agencies)

Employers of adults in group:

Non-profit agencies in group:

Non-profit agencies of type: (type refers to user-defined sub-categories)

Non-profit agencies with clientele in group:

4. SESSION INFORMATION

This chapter summarizes *session* information which pertains to students, teachers, classes, bus routes and the school calendar. Within *Overseer* a *session* normally refers to an academic school year, but may correspond to a specific semester or term within a school year. The only reason to create separate *sessions* for each term is to accommodate major changes in the curriculum, student timetables or teacher duties between terms.

Unlike the directory of persons, families and organizations, which is always kept current, *session* information is maintained simultaneously for all *sessions*. After a designated number (1-5) of years, *session* detail information is automatically deleted as part of *Year-End Processing*.

4.1 General

Each session must have the following data fields defined:

<i>Session Name:</i>	(mandatory) <i>name</i> of session (e.g. "1997-98")
<i>Start Date:</i>	(mandatory) <i>start date</i> of session (must not overlap any other session); this date must be on or before the first school day.
<i>End Date:</i>	(mandatory) <i>end date</i> of session (must not overlap any other session); the duration of a session cannot exceed 1 year; the <i>end date</i> must be on or after the last school day.
<i>Number of Terms:</i>	(mandatory) number of <i>terms</i> (1-4) in session.
<i>Term Start Dates:</i>	(mandatory) <i>start dates</i> of all terms other than the first term
<i>Daily Attendance:</i>	(mandatory) designation of method of recording student attendance information for this session: <i>Daily Attendance:</i> daily (or half-day) attendance status to be logged for all students, <u>or</u> <i>Term Attendance:</i> summary attendance information is to be logged for each term at the time when report cards are generated.

The above information can be revised at any time. However, care should be taken to avoid unnecessary editing of these data fields because changes will be reflected in other data (e.g. attendance information, student enrolment periods and school calendar).

At any given time, one particular *session* is always the *active session*. The *name* of the *active session* is visible on the right side of the status bar at the bottom of the main screen. In addition, a particular date (between the *start date* and *end date* of the *session*) is always designated as the *active date*. The *active session* and *active date* determine which data will appear in list boxes.

Some entities (e.g. *bus routes* and *classes*) are session-dependent but not date-sensitive. Most

data which is maintained for these entities is assumed to be applicable for the entire session. If, for example, a *bus route* was changed in mid-session, that change must be implemented to keep the bus route current for the session, but no record will be kept of the earlier bus route (for the start of the session) which has been updated.

Other entities (e.g. *students* and *teachers*) may be enrolled (or given teaching assignments) for any arbitrary *range of dates* within a *session*. A *child* will appear in a *list of students* only if he/she is, or was, enrolled on the *active date* upon invoking the *student list*. Similarly, an *adult* will appear in a *list of teachers* only if he/she had a teaching assignment on the *active date* upon invoking the *teacher list*. Furthermore, whenever reference is made to *students* or *teachers* from within other detail screens of *Overseer*, the *active date* will be used to resolve whether or not the person is, or was, a *student* or *teacher* for the purpose of the screen display or generated report.

The *active date* may be modified either through the *Session / Select* menu option (via the *active date* spin control) or through the *Session / Calendar* menu option (via the calendar and *Set Active Date* button).

4.2 Students

Unless stated otherwise, *students* within *Overseer* are always assumed to be *children* who are enrolled in the local school as of the *active date* and *session*.

Students are not added explicitly to the *student list*. Rather, they are added indirectly via the *Child / Schools* detail screen by first enrolling *children* in the local school for a fixed or open *enrolment period* and grade level regime. Once an *enrolment period* exists (for a *child* within the local school), and the *enrolment period* includes the *active date*, the *child* will be considered to be a *student* in the school.

Students are added to a *class* by selecting them (via the *Class / Students* detail screen) from a list of all enrolled *students* at the relevant grade level who have not yet been assigned to a *class* as of the *active date*.

Once a *child* has been designated as a *student* in the local school, for one or more *sessions*, that *child* cannot be deleted from the *Overseer* database until all enrolment records have been deleted explicitly or purged as part of *Year-End Processing*.

The *Student / General* tabsheet of *Overseer* displays core summary information which is maintained elsewhere (i.e student's *name, gender, birthdate, age, telephone, bus route, grade, class, login/email ID, (optional) student number, address, parents/guardians, emergency contacts, medical/professional contacts and church contacts*). The following information is maintained, in addition to *child* and *family* information, on the various tabsheets for each *student* in the local school:

<i>Student Photo:</i>	(optional) <i>student (bit-map) photo</i>
<i>Allergies:</i>	(optional) <i>allergies</i> or <i>medical conditions</i>
<i>Treatment:</i>	(optional) <i>emergency treatment</i> for <i>allergies</i> or <i>medical conditions</i>
<i>Health card number:</i>	(optional) <i>health card number</i>
<i>Login/Email Name:</i>	(semi-automatic) 1-12 character <i>loginID</i> (for LAN) and/or <i>email name</i> (guaranteed to be unique for all students and teachers); this <i>name</i> is generated automatically when a student is first enrolled; it may be edited manually.
<i>Password:</i>	(semi-automatic) 1-10 character <i>password</i> for LAN login or email access; this <i>password</i> is generated automatically when a student is first enrolled; it may be edited manually.
<i>Student Number:</i>	(semi-automatic) <i>student number</i> ; several options are provided for creating, maintaining and validating the student number; it may always be edited manually; this field is optional on reports (including report cards).

The following information is maintained for each *session* (or portion thereof) for which the *student* was enrolled in a particular grade and class:

<i>Session Name:</i>	(automatic) <i>session name</i>
<i>Start and End Dates:</i>	(semi-automatic) <i>start and end dates</i> of a continuous enrolment period; defaults to <i>full session</i> on first enrolling student in class; can be edited to a portion of the <i>session</i> manually thereafter
<i>Class:</i>	(optional) <i>class ID</i> which is assigned when student is added to a class; it may be edited (within the same grade level) later, or the student may be transferred to another class at the same (or different) grade level in mid-session.
<i>Outcome:</i>	(optional) descriptive field for qualified or conditional <i>promotion status</i> at end of period.

Student *marks* may be recorded for each *term* of a *session* for subsequent printing of report cards. The following fields are available:

<i>Days Absent:</i>	(automatic) cumulative <i>days absent</i> (to 1 decimal place) if <i>daily attendance</i> keeping is in use; otherwise, this is an optional field for manual entry of <i>days absent</i> .
<i>Times Late:</i>	(automatic) cumulative number of <i>times late</i> if <i>daily attendance</i> keeping is in use; otherwise, this is an optional field for manual entry of <i>times late</i> .
<i>Overall Average Mark:</i>	(optional) <i>weighted average mark</i> for all <i>subject areas</i> (not used by <i>default</i> report cards; optional at design time for

	<i>custom</i> report cards).
<i>Subject Area Marks:</i>	(optional) <i>marks</i> for each <i>subject area</i> on report cards
<i>Subject Component Marks:</i>	(optional) <i>marks</i> for each <i>subject component</i> on report cards; one or more <i>subject components</i> are grouped under each <i>subject area</i>
<i>Subject Category Marks:</i>	(optional) assessed marks (not based on tests) which may be used on <i>custom</i> report cards; not available for <i>default</i> report cards; there may be zero, one or more <i>subject categories</i> grouped under each <i>subject component</i> .
<i>Subject Area Comments:</i>	(optional) <i>comments</i> for each <i>subject area</i> on report cards
<i>Summary Comments:</i>	(optional) <i>summary comments</i> for term (to appear on report cards)
<i>Internal Comments:</i>	(optional) <i>internal comments</i> for term (will <u>not</u> appear on report cards; for internal school use only)

Continuing with student data fields:

<i>Pick-up bus route:</i>	(linked) name of <i>bus route</i> student takes to school
<i>Pick-up bus stop:</i>	(linked) name of <i>bus stop</i> at which student boards the bus on the way to school
<i>Drop-off bus route:</i>	(linked) name of <i>bus route</i> student takes home from school
<i>Drop-off bus stop:</i>	(linked) name of <i>bus stop</i> at which student is dropped off on the way home from school
<i>Session Notes:</i>	list of (optional) <i>session notes</i> identified by titles and dates which apply to the student for the <i>active session</i> only. <i>Session notes</i> can be added to or deleted from this list by the user at any time. Each note can optionally be designated as <i>Public</i> . This designation can later be used to determine which notes to print on <i>Student Profile</i> reports.
<i>General Notes:</i>	list of (optional) <i>general notes</i> identified by titles and dates which apply to the student and are available for all sessions. <i>General notes</i> can be added to or deleted from this list by the user. Each note can optionally be designated as <i>Public</i> . This designation can later be used to determine which notes to print on <i>Student Profile</i> reports.

<u>Hot-Links:</u>	<i>Family:</i>	Family detail information for <i>student</i>
	<i>Child:</i>	Child detail information for <i>student</i>
	<i>Class:</i>	Class detail information for <i>student's class</i>
	<i>Parent Contact:</i>	Adult detail information for <i>student's parent</i>
	<i>Emergency Contact:</i>	Adult detail information for <i>student's emergency contact</i>
	<i>Med/Prof Contact:</i>	Organization detail information for <i>student's medical or professional contact</i>

Church Contact: Organization detail information for *student's church contact*
Pick-up Bus Route: Bus route detail information for *student's pick-up bus route*
Drop-off Bus Route: Bus route detail information for *student's drop-off bus route*

Filters: Any one of the following filter subsets may be selected for student lists:

(All students)
(Students without a photo)
Clientele of organizations in group:
Clientele of organization:
Students dropped off on bus route:
Students picked up on bus route:
Students in class:
Students in division:
Students in family:
Students in grade:
Students in group:
Students in home room
Students of families in group:
Students on bus route:
Students with allergies

Constraints: One or more of the following selection constraints may be applied to lists of students:

Specific substring (e.g. street name) in address
City
State/Province
Country
ZIP/Postal Code (or prefix thereof)
Range of Mail Status
Range of age
Range of Dates of Birth (year, month and day)
Range of Birthdays (month and day)
Attendance Period, Status (Absent, Absent or Excused, Excused, Late, Present, Present or Excused) and Range of Days or Times
Gender (Males only, Females only, or both)

4.3 Teachers

The *staff* of a local school are selected from the list of *adults* whose names and *family* information is central to the *Overseer* database. *Teachers*, in turn, are selected from the list of *active staff* members.

Although *teachers* may have a continuing role for many years within the same school, they must be explicitly assigned to each *session* within *Overseer*. This is not an onerous task. In fact, multiple *teachers* can be selected at one time and added to the *active teacher list* for the *active session*.

When first added to the *active teacher list* for a given *session*, the default *teaching assignment period* is the full *session*. The *start* and/or *end dates* of the *teaching assignment* may subsequently be modified to encompass any subset of contiguous dates within the *session*. If the *teacher* is assigned different duties in *mid-session*, then a new *assignment period*, with unique *teacher duties* can then be created for this new *partial session*.

The *list of teachers* on any school day includes only those *teachers* who have assignments which include the *active date and session*.

How then are *classes* assigned to a *teacher*? Within *Overseer*, *classes* and *teachers* are linked through the *room name/number*. *Classes* are not identified primarily by the name of the *teacher* to avoid confusion in the case where a *teacher's assignment* changes in *mid-session*. The link between a *class* and *teacher* (and identification of *students* in the *class*) is based solely on the *active date and session*. However, once the link is made via the *room name/number*, the *teacher's name* will appear beside the *class ID* in the *list of classes*. **Teacher and class home room assignments are very important when using *Overseer LAN* or *Overseer Grades*. Do not omit to assign these correctly for all teachers and classes before doing any of the following: (a) invoking *default subject areas* and *default subject components* for a class for default report card designs; (b) importing *custom* report card designs; (c) using *Overseer LAN* or (d) creating *Grades* databases.**

Once a person is identified as a *teacher* in the local school, or even a *staff member*, that person cannot be deleted from the *adult list*. The person must have all *teaching history* removed from *Overseer* (either explicitly or via *Year-End Procession*), and be removed from the *staff list* before his/her name can be deleted from the *adult list*.

The *Teacher / General* tabsheet of *Overseer* displays core summary information which is maintained elsewhere (i.e. *teacher's name*, *gender*, *formal name*, *login/email ID*, *home room name/number*, *home room classes* (by grade, count of boys, girls and total), *telephone* and *address*). The following information is maintained, in addition to *adult*, *family* and *staff* information, on the various tabsheets for each *teacher* in the local school:

Next of Kin: (linked) closest *family member or friend* to contact in emergencies; this may also may viewed under *staff*

	information
<i>Allergies/Treatment:</i>	(optional) information and <i>treatment</i> for any <i>allergies or medical conditions</i> of the <i>teacher</i> ; this may also may viewed under <i>staff</i> information
<i>Medical/Prof Contacts:</i>	(linked) list of <i>medical and professional contacts</i> for emergency purposes for this <i>teacher</i> (edited via the <i>Adult / Affiliations</i> tabsheet)
<i>Church Contacts:</i>	(linked) list of <i>church contacts</i> for emergency purposes for this <i>teacher</i> (edited via the <i>Adult / Affiliations</i> tabsheet)
<i>Date of birth:</i>	(optional) <i>date of birth</i> of <i>teacher</i> ; this may also may viewed under <i>staff</i> information
<i>Health Card Number:</i>	(optional) <i>health card number</i> of <i>teacher</i> ; this may also may viewed under <i>staff</i> information

The following *teacher duties* may be recorded for each *teaching assigning session* (or partial session), for each *program day* (or *week day*):

<i>Start and End Times:</i>	(mandatory) <i>start time and end time</i> of <i>teaching period</i>
<i>Room Name/Number:</i>	(optional) <i>room name/number</i> where the <i>teacher</i> is on duty; if the <i>room name/number</i> is assigned, and there are <i>classes</i> assigned to the same <i>room</i> , whose timetables overlap with this <i>teaching period</i> , then the <i>classes</i> and corresponding <i>class timetables</i> will be listed on the same screen as the highlighted <i>teacher duty period</i> .
<i>Duty Description:</i>	(mandatory) description of classes and subjects taught during this period

The following information is maintained for each *session* (or portion thereof) for which the *teacher* had assigned *teaching duties*:

<i>Session Name:</i>	(automatic) <i>session name</i>
<i>Start and End Dates:</i>	(semi-automatic) <i>start and end dates</i> of a continuous enrolment period; defaults to <i>full session</i> on first assigning the <i>teacher</i> to a <i>session</i> ; can be edited to a portion of the <i>session</i> manually thereafter
<i>Home Room Name/Number:</i>	(linked) <i>home room</i> assigned to <i>teacher</i> for this <i>session</i> (or partial session). This links the teacher to all classes with the same home room assignment, and partially controls database access to classes and students via <i>Overseer LAN</i> and <i>Overseer Grades</i> .
<i>Classes:</i>	(automatic) <i>class ID's</i> (including <i>grade levels, count of boys, girls and total students</i>) of <i>classes</i> assigned the same

home room as the teacher; this information is listed for the highlighted *teaching session*

Continuing with *teacher* data fields:

Session Notes: list of (optional) *session notes* identified by titles and dates which apply to the teacher for the *active session* only. *Session notes* can be added to or deleted from this list by the user at any time. Each note can optionally be designated as *Public*. This designation can later be used to determine which notes to print on *Teacher Profile* reports.

General Notes: list of (optional) *general notes* identified by titles and dates which apply to the teacher and are available for all sessions. *General notes* can be added to or deleted from this list by the user. Each note can optionally be designated as *Public*. This designation can later be used to determine which notes to print on *Teacher Profile* reports.

Hot-Links:

<i>Adult:</i>	Adult detail information for the <i>teacher</i>
<i>Family:</i>	Family detail information for the <i>teacher</i>
<i>Class:</i>	Class detail information for any <i>class</i> in teacher's home room
<i>Next of Kin:</i>	Adult information for teacher's <i>next of kin</i>
<i>Med/Prof Contact:</i>	Organization information for emergency <i>medical or professional contacts</i> for teacher
<i>Church Contact:</i>	Organization information for <i>church contacts</i> for the church with which the teacher is affiliated

Filters: Any one of the following filter subsets may be selected for teacher lists:

(All teachers)
Home room teachers in division:
Home room teachers in grade:
Teachers in group:
Teachers in home room:

Constraints: None

4.4 Classes

Classes must be explicitly created for each *grade level* and school *session*. Within *Overseer*, the

concept of a *class* is further restricted to mean: *all children, at the same grade level, who have the identical home room, time-table and report card.* With this definition, it is clear that a teacher could be teaching more than one *class* at a time for certain periods of each day.

The reason for this designation of a *class* is to be able to include as many children as possible when creating timetables, and avoid creating unique timetables for each student.

Except for *student members* of a *class*, all *class* information is assumed to be constant for the duration of a *session*. *Students* may enter or leave the *class* on any date during the *session*, but the *class* is assumed to have a fixed *timetable* for the *full session*. If this is not true in practice then there are two options which a school may follow: create a new *session* for each *term*, or update the *class* information (*timetable* etc) in *mid-session* so that it is *current* (even though it does not correctly represent the earlier portion of the *session*).

Classes may be added, edited or deleted at any. Caution should be exercised when deleting *classes* because all *student marks*, *subjects* and *timetable* information will be lost upon deletion of the *class*.

Teacher and class home room assignments are very important when using *Overseer LAN* or *Overseer Grades*. Do not omit to assign these correctly for all teachers and classes before doing any of the following: (a) invoking *default subject areas* and *default subject components* for a class for default report card designs; (b) importing *custom* report card designs; (c) using *Overseer LAN* or (d) creating *Grades* databases.

Assignment of responsibility to *teachers* as *subject area heads* and *subject component teachers* for each *class* is critical to the successful implementation of *Overseer Grades*. This should be done correctly before creating *Grades* databases for *teachers*. These assignments strictly govern which *teacher* can record information pertaining to each *subject area* and *subject component*.

These assignments, together with *home room* assignments for *teachers* and *classes*, also control access to *class* and *student* information by *teachers* via *Overseer LAN*. However, in the case of *Overseer LAN*, once a *teacher* has access to information for a given *class*, that *teacher* is able to edit any marks or comments related to report cards for *students* in that *class*. This gives greater scope for last-minute editing by *teachers*, before printing report cards.

The following information is managed for each class:

<i>Class Abbreviation:</i>	(mandatory) unique <i>abbreviation</i> for the <i>class</i> (e.g. "3A")
<i>Grade Level:</i>	(mandatory) <i>grade level</i> ; this cannot be edited, once assigned
<i>Session Name:</i>	(automatic) <i>name of session</i> to which <i>class</i> belongs
<i>Home Room:</i>	(mandatory) <i>home room name/number</i> of <i>class</i> . This links

	the class to the teacher with the same home room assignment, and partially controls database access by teachers to classes and students via <i>Overseer LAN</i> and <i>Overseer Grades</i> .
<i>Home Room Teacher:</i>	(automatic) <i>name of teacher</i> , if any, assigned to the same <i>home room</i>
<i>Class Description:</i>	(optional) <i>class description</i>
<i>List of Students:</i>	(linked) list of <i>students</i> in the <i>class</i> as of the <i>active date</i> ; students may be added to or deleted from the class on any date during a session; transfers between <i>classes</i> at the same grade level, within the local school, should be performed via the <i>Student / History</i> tabsheet (this will preserve as many of the student's marks as possible); transfers to a different grade level or to a different school should be performed via the <i>Child / Schools</i> tabsheet; deletions from the <i>Class / Students</i> tabsheet should normally be made only during the initial allocation of <i>students</i> to <i>classes</i> before the beginning of a <i>session</i> .
<i>Subject Abbr/Description:</i>	(semi-automatic) list of <i>abbreviations</i> and <i>descriptions</i> of <i>subjects</i> taught to this <i>class</i> for the <i>active session</i> ; the default list of <i>subjects</i> may be generated automatically from the <i>default subjects</i> for the respective division; minor additions, deletions or editing of the <i>subjects</i> may then be performed manually at any time; only subjects in this list may be used in the class timetable
<i>Subject Area Abbreviation:</i>	(semi-automatic) unique 1-3 character <i>abbreviation</i> for the <i>subject area</i> . This field is used to correlate <i>subject areas</i> between <i>classes</i> when transferring a student (while preserving the student's marks) from one <i>class</i> to another in mid-session; it is also used to correlate <i>subject areas</i> between <i>Grades</i> databases and the master <i>Overseer</i> database.
<i>Subject Area Description:</i>	(semi-automatic) description of <i>subject area</i> used on student report cards; this field is fixed at design time for <i>custom</i> report cards; for <i>default</i> report cards, <i>subject area descriptions</i> (and <i>subject area abbreviations</i>) are based on the defaults for the respective <i>division</i> to which the <i>class</i> belongs; once the defaults are selected, manual additions, editing and deletions are still permitted at any time.
<i>Teacher Login Name:</i>	(semi-automatic) <i>login name</i> of the head <i>teacher</i> for this <i>subject area</i> ; the default <i>teacher login name</i> is that of the <i>teacher</i> with the same <i>home room</i> assignment as the <i>class</i> at the time when the <i>default subject areas</i> are implemented;

once the defaults are selected, the assigned *teacher* may subsequently be edited at any time; the *teacher login name* partially controls database access by *teachers* to *classes* and *students* via *Overseer LAN* and *Overseer Grades*; it also controls which *teacher* can enter *subject area* comments and override *subject area* marks (but not *subject component* marks) at the end of each term via *Overseer Grades*.

Subject Component Abbrev: (semi-automatic) unique 1-3 character *abbreviation* for the *subject component*; *subject components* are detail line items which will appear on *default* report cards under a *subject area*. The *abbreviation* field is used to correlate *subject components* between classes when transferring a student (while preserving the student's marks) from one *class* to another in mid-session; it is also used to correlate *subject components* between *Grades* databases and the master *Overseer* database.

Subject Comp Description: (semi-automatic) description of *subject component* used on student report cards; this field is fixed at design time for *custom* report cards; for *default* report cards, *subject component descriptions* (and *subject component abbreviations*) are based on the *defaults* for the respective *subject area* and *division* to which the *class* belongs; once the defaults are selected, manual additions, editing and deletions are still permitted at any time.

Subject Categories: (semi-automatic) *subject category abbreviations* and *descriptions* are available only when *custom* report cards are used; they are defined via *Overseer Reports* and are imported with design files into *Overseer Admin*; *subject category descriptions* can be edited within *Overseer Admin* provided the designer has marked individual *subject categories* as editable in the imported design file.

Teacher Login Name: (semi-automatic) *login name* of the *teacher* for this *subject component*; the default *teacher login name* is that of the *teacher* with the same *home room* assignment as the *class* at the time when the *default subject areas* and *components* are implemented; once the defaults are selected, the assigned *teacher* may subsequently be edited at any time; the *teacher login name* partially controls database access by *teachers* to *classes* and *students* via *Overseer LAN* and *Overseer Grades*; it also strictly controls which *teacher* (and there can only be one) can enter *subject component* test scores and override *subject component* marks at the end of each term via *Overseer Grades*.

Student *marks* may be recorded for each *term* of a *session* for subsequent printing of report cards. The following fields are available (via the *Class / Marks* tabsheet):

<i>Days Absent:</i>	(automatic) cumulative <i>days absent</i> (to 1 decimal place) if <i>daily attendance</i> keeping is in use; otherwise, this is an optional field for manual entry of <i>days absent</i> .
<i>Times Late:</i>	(automatic) cumulative number of <i>times late</i> if <i>daily attendance</i> keeping is in use; otherwise, this is an optional field for manual entry of <i>times late</i> .
<i>Overall Average Marks:</i>	(optional) <i>weighted average marks</i> for all <i>subject areas</i> (not used by <i>default</i> report cards; optional at design time for <i>custom</i> report cards).
<i>Subject Area Marks:</i>	(optional) <i>marks</i> for each <i>subject area</i> on report cards
<i>Subject Component Marks:</i>	(optional) <i>marks</i> for each <i>subject component</i> on report cards; one or more <i>subject components</i> are grouped under each <i>subject area</i>
<i>Subject Area Comments:</i>	(optional) <i>comments</i> for each <i>subject area</i> on report cards
<i>Summary Comments:</i>	(optional) <i>summary comments</i> for term (to appear on report cards)
<i>Internal Comments:</i>	(optional) <i>internal comments</i> for term (will <u>not</u> appear on report cards; for internal school use only)

Note that the above information may also be entered/viewed via the *Student / Marks* tabsheet. The difference between the two is the way in which marks are displayed. In one case, all marks are shown for a given *subject area (or component)* for one *student* at a time. In the other, the marks for all *students* are shown for one *subject area (or component)* at a time.

The following *class timetable* information may be recorded for each *class period*, for each *program day* (or *week day*):

<i>Start and End Times:</i>	(mandatory) <i>start time and end time</i> of <i>class period</i>
<i>Room Name/Number:</i>	(optional) <i>room name/number</i> where the <i>class</i> meets; if the <i>room name/number</i> is assigned, and there are <i>teachers</i> assigned to the same <i>room</i> , whose duties overlap with this <i>class period</i> , then the <i>teachers</i> and corresponding <i>teacher duties</i> will be listed on the same screen as the highlighted <i>class period</i> .
<i>Subject:</i>	(linked) description of <i>subject</i> taken during this <i>class period</i>

Continuing with class data fields:

<i>Session Notes:</i>	list of (optional) <i>session notes</i> identified by titles and dates
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reports and on the *Student / General* tabsheet

Bus Registration Number: (optional) vehicle *license plate number* of bus

Capacity: (optional) *number of students* bus is authorized to transport

Session Name: (automatic) name of *session* to which *bus route* belongs

Arrival Time: (optional) nominal *arrival time* of bus at school

Departure Time: (optional) nominal *departure time* of bus from school

Driver: (linked) *principle driver* of bus (selected from adult list)

Alternate Driver: (linked) *alternate driver* of bus (selected from adult list)

Pick-up Times & Locations: (manual) nominal *pick-up times* (hh:mm) and *locations* of each *bus stop* along the *pick-up bus route*

Students Boarding: (linked) list of *students who board the bus* at each *pick-up bus stop*

Drop-off Times & Locations: (manual) nominal *drop-off times* (hh:mm) and *locations* of each *bus stop* along the *drop-off bus route*

Students Deboarding: (linked) list of *students who deboard the bus* at each *bus stop*

Student Summary: (automatic) *summary list of all students* on *pick-up* and/or *drop-off routes*, together with their *bus stop times*, and the *gender* and *grade levels* of the *students*

Session Notes: list of (optional) *session notes* identified by titles and dates which apply to the *bus route*. *Session notes* can be added to or deleted from this list by the user at any time.

Hot-Links: *Driver Contact:* Adult detail information for *principal driver* of bus
 Alt Driver Contact: Adult detail information for *alternate driver* of bus
 Student Contact: Student detail information for any *student* on the bus route

Filters: (*All bus routes*)

Constraints: None

4.6 Calendar Day Types

In order to design a useful *school calendar* it is necessary to classify the days within each school *session* as *instructional days*, *PA/PD days*, *event days*, *holidays*, *weekend days*, and even *school closure days* (when the school was closed because of bad weather, or other cause).

Instructional days also need to be defined in terms of the cycle of teaching days for purposes of making student timetables and assigning teacher duties. Most schools may have timetables and teacher duties which are based on the day of the week (e.g *Monday, Tuesday, ... Friday*). Other schools may have a 3 or 4-day cycle (e.g. *Day1, Day2, ... Day4*) which repeats cyclically,

irrespective of the day of the week. *Overseer* will accommodate either of these schemes.

Event days (e.g. “Track and Field Day”) are days when students are expected to attend school, but the normal teaching periods are replaced by a special event or feature.

PA/PD days are professional activity or professional development days for staff. On these days students do not attend school.

Weekend days are the days of the week (e.g. *Saturday* and *Sunday*) which are not regular school days. The number of school days per week may be as low as 1, or as high as 6, starting on any arbitrary weekday. The weekend days are the remaining days of the 7-day week.

Holidays are days when both staff and students do not attend at school.

Closure days are planned *instructional days* or *event days* which had to be canceled.

Non-instructional days (*PA/PD days*, *event days*, *holidays* and *closure days*) typically recur from one session to next. *Overseer* supports creation of *named day types* for these recurring days (e.g. “Christmas Vacation”, “Easter Monday”, “Snow Day”, “Track and Field Day”, “Reporting Day”, “Mid-Winter Break”). These named day types, together with the *weekend* and *instructional days* (e.g. “Monday”, “Tuesday” ... or “Day1”, “Day2” ...) form a list of available days, one of which must be assigned to each day of each school session.

The *list of calendar day types*, together with *day type descriptions*, is maintained via the *Session / Calendar Day Types* screen. The allocation of specific *day types* to each day of the *session* is performed via the *Session / Calendar* screen, as described in the next section.

Independent lists of valid *day types* are maintained for each *session*. In this way, revisions to the *day types* for a new *session* will not alter the *calendar* for the previous *session*.

When a new *session* is created, the *day types* for the previous *session* are automatically adopted as default *day types* for the new *session*. They may subsequently be revised at any time.

4.7 Calendar

The *school calendar* is a special screen within *Overseer* which shows colour-coded dates on a *calendar* for one month at a time, for any month within the *active session*.

When a new *session* is first created, the *school calendar* is automatically populated by *instructional days* and *weekend days* for the full *session*, based on the school day teaching cycle used by the previous *session*, if any.

The user may subsequently designate any day (or range of days) of the *session* as any of the valid

day types. In addition, *descriptions* of these designated days may be edited, as appropriate, at any time.

Session notes may be created for any day in the *session calendar* as a reminder to the user of key events or activities etc. for that day. The *session notes* for a given day appear automatically as the user clicks on the relevant *calendar day*.

The *school calendar* may be printed at any time, giving a list of all *special days* of the year. The trigger for inclusion in this list is the fact that a day (or range of days) has a non-blank *description* field assigned to it. This excludes normal *school* days and *weekend* days from the printed *calendar*.

The *school calendar* may also be used to change the *active date* within *Overseer*. This is accomplished by clicking on the desired day to highlight it, then clicking the *Set Active Date* button.