



Administration How Do I?



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Getting Started

Benefits of Integris^{G2}

Integris^{G2} is a completely **web-based** solution and therefore takes a **browser-based** approach. With Integris^{G2} both the data and the application are now hosted centrally, either within the local authority or as a managed service provided by RM. This allows for a much more simple and efficient method of managing and maintaining data, which can be accessed by any PC – either at home or at school – with an internet connection and appropriate access security. It is therefore both secure and at the same time affords the most flexible method of working.

The immediate benefits of Integris^{G2} can therefore be summarised as follows:

- The data is no longer held at school level and so lifts the burden of maintaining the infrastructure to support that data. Instead the data is now held and maintained entirely at the hosted site
- There is no longer any requirement to apply frequent and regular software upgrades, either to the school server or to each admin PC at the school; instead the upgrades are applied at the hosting site. This also means there will never be any module mismatches; you will always be using the most up-to-date version of the software.
- The new architecture significantly reduces the impact of any hardware failures experienced at the school
- A simplified PC requirement – only requires internet access to the outside world.
- No need to take data back-ups at the school; these will now be carried out automatically at the hosting site
- Reduces the need to provide manual data extract files to the Local Authority.
- The system will be available from virtually any internet-connected PC anywhere in the world.
- Data Security – banking-strength encryption is used to protect the security of your data. The encryption process is enhanced by an *Administrator variable* "Time-Out" process, whereby Integris^{G2} will force any user who has been inactive for a specified period of time to log out of the system and log back in again.



Note: The best screen resolution for Integris^{G2} is 1024 x 768. The easiest way to set this is to right-click on your Desktop area, choose “Properties” from the resulting menu and then access the “Settings” tab. You can adjust the resolution by moving the “Screen Resolution” slider up or down.

Getting Started

As Integris^{G2} can be accessed from virtually any PC, it is a useful step to know how to create a shortcut to the application. You may wish to access Integris^{G2} from your home PC, or from a different PC in school.

Finding the Path to Integris^{G2}

Creating a shortcut on your desktop is a simple procedure, but first of all you must make sure you know the “path” that the shortcut will follow to Integris^{G2}.

The easiest way to find out this path is to look at an existing Integris^{G2} shortcut, as follows:

Creating the Shortcut

To create a shortcut to Integris^{G2} on the desktop of a PC:



- Type in the URL into the address field in Internet Explorer
- Click Go (or enter)
- When you enter the front page of Integris G2

RM Integris

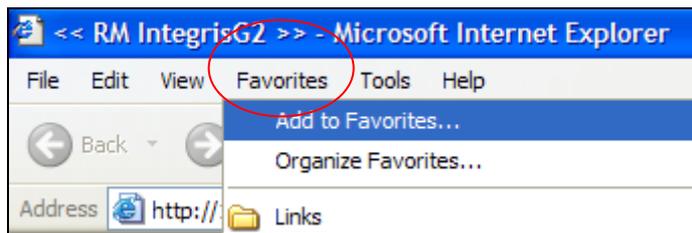
Username

Password

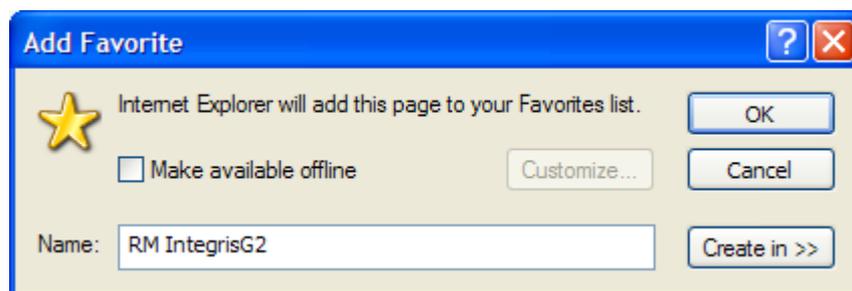
Remember me ⓘ

Log in

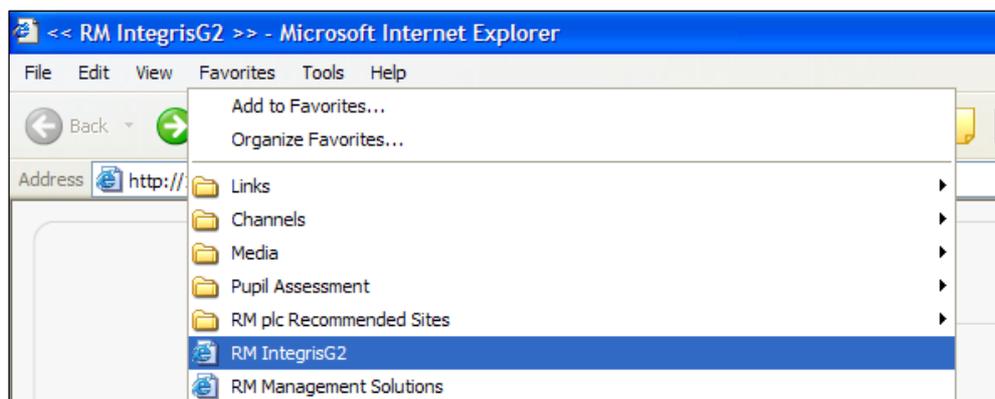
- Go to Favourites on the Internet Explorer toolbar and select **Add to Favourites** and save in the appropriate folder



- You will then be asked to provide a name for the link you are storing



- After you have labelled your shortcut (use the "Create In" option if you wish to create the link in a specific folder), then finally click on **OK** to save. Your entry will now be in the Favourites list.



- Go to **Favourites** and find your entry for Integris G2
- Right click and select **Send to Desktop (create shortcut)**

The GENERAL Module

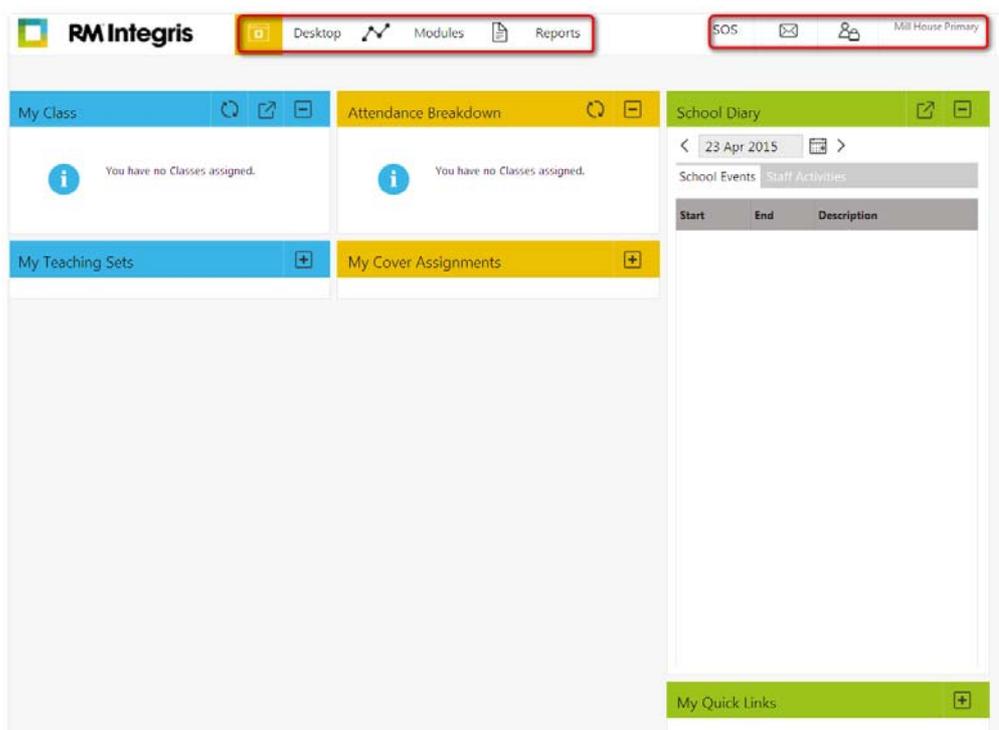
When Integris^{G2} is first opened, the main navigation screen is displayed and the layout of this screen (shown below) is consistent across all areas of Integris^{G2}. There are also a number of intentional similarities with the original Integris screens. You will see that there is a toolbar down the side of the screen, used to access the different modules and the various areas within them. Previously, the toolbar was on the right in Integris and has now moved to the left in Integris^{G2}, but the basic function is still the same.

The tool bar at the top of the screen includes frequently used system functions and also quick access buttons to emergency information.

The functional areas of the product are separated into two main tabs:

- Modules
- Reports

A number of top-level menus are contained within each tab and are available for selection. Once selected, they will reveal a number of options relevant for that area. So, as illustrated in the figure below, if you select 'General', this will reveal options such as 'Student Details', 'Groups', 'Parameters', 'School Details', 'School Diary' etc. Navigation between options requires only a single click and these options will remain visible until an alternative functional area is selected.



Student Details

As with Integris, Integris^{G2} maintains comprehensive information for student records on the Current, Former, Admissions and External rolls. The student section of the system is accessed through the General module and selecting the option **Student Details**. Wherever possible the functionality in this area has also been consistently applied to the staff windows, utilising many similar icons.

Naturally, the layout and display of information is similar to that of Integris, although changes have been applied to bring together specific fields and parameters into more logical groups. On accessing the **Personal** window, the student's personal details are displayed in the top half of the window whilst contact and sibling information is retained in a table format at the bottom.

Modules > General > Student Details

Personal Communicate | Find | Add | Edit | Move To Former Roll | Print

Personal | Names | Entitlement | Enrolment | Attendance | Additional | Medical | Groups | Documents >

Current < > Browsing all students Quick Search

Woody Allen (83) Year : N2 Class : Nursery AM House : Not specified

Gender: Male **Address:** 1 Eden Garden
Date of Birth: 14 Jan 2011 monkton
Age: 4 Yrs 3 Mths York
Teacher(s): Mr James Woodward YO23 7TP
 Ms Nicola Fox **Administrative Area:**

Room:
UPN: G816299810003
Exam No:
ULN:
Car Registration:

Home 1: 01234567896 **Fax:**
Home 2: 98765432100
Mobile: **Email:**

Contacts & Siblings

| Name | Phone | Address | Relation | Res | Par | Mail | Emrg | Notes | Fee |
|--------------------------|-------------|--|----------|-----|-----|------|------|-------|-----|
| Mr & Mrs allen | 98765432100 | 1 Eden Garden, monkton, York, YO23 7TP | Carer | No | No | No | 0 | No | No |
| Tony Smith(Current Roll) | 01234567896 | 1 Eden Garden, monkton, York, YO23 7TP | Sibling | n/a | n/a | n/a | 0 | n/a | n/a |

Edit | Move To Former Roll | Print

Groups | Documents

Search

Year : Nursery AM House :

- Movements
- Teaching Sets
- SEN
- Activities
- UDI
- Key Stage

Adding a New Student



To add a new student, click on the **Add** hyperlink option located at the top right of the window. The following entry screen will appear, enabling users to insert the relevant student information. The toolbar at the top of the screen has several tabs, segmenting the information fields into logical categories; you may move between tabs in any order. In general, the appearance of each tab is consistent with the Integris predecessor, although certain fields have been repositioned into a more logical order.

Add Student - Personal - [Menu]

Personal Family Entitlement Enrolment Attendance Additional Medical Groups Movements >

Surname: * [Text Field] [Clear]

Legal Surname: * [Text Field]

Previous Surname: [Text Field]

First Name: * [Text Field]

Second Name: [Text Field]

Third Name: [Text Field]

Known Name: * [Text Field]

Sub-dwelling: [Text Field] [Clear]

Dwelling: [Text Field] [Clear]

Street: [Text Field]

Locality: [Text Field]

Town: [Text Field] (York)

County: [Text Field]

Postcode: [Text Field]

Country: [Text Field]

Administrative Area: [Text Field]

Reference: * [Text Field]

UPN: [Text Field] [Lock]

Temporary UPN:

Date of Birth: * [Text Field] [Calendar]

Birth Certificate Seen:

Gender: * [Dropdown] (Male)

Photo [Image] [Browse...]

Home Telephone 1: [Text Field]

Home Telephone 2: [Text Field]

Mobile: [Text Field]

Fax: [Text Field]

Email: [Text Field]

Car Registration: [Text Field]

Family Representative:

Year: [Dropdown] (Not Specified)

NC Year: [Dropdown] (Not Specified)

Class: [Dropdown] (Not Specified)

House: [Dropdown] (Not specified)

ULN: [Text Field]

A number of mandatory fields exist (shown with an *) and these are:

- Surname
- Legal Surname
- First Name
- Known Name
- Date of Birth
- Reference
- Entry Date

It is also best practice to include:

- Gender
- Address Details
- Family Details

- Medical Information

To edit an existing student's details, you must first display their record on screen by using either the scrolling arrows (remember: records are displayed in alphabetical order) or the **Find** facility and then click on the **Edit** hyperlink option.



Part Time Pupils

Many schools will have part time pupils, and it is sometimes the case that these pupils will attend a mixture of AM & PM sessions (rather than just AM sessions or just PM sessions). IntegrisG2 allows you to quickly and easily reflect these daily attendance patterns.

To mark a part time attendance pattern for an existing pupil:



- Go into *General>>Student Details* and click on the **School Enrolment Details** tab.
- Click on **Edit** at the top of the screen
- You will now see the screen below

Edit Student - School Enrolment Details - Woody Allen

| Personal | Family | Entitlement | Enrolment | Attendance | Additional | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|---|--|-------------------------------------|-------------------------------------|--------------------------|--------------------------|-----|-----|-----|-----|-----|-----|----|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|----|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Entry Date: 03 Sep 2013 Leave Date: 02 May 2015 Records Sent: | Previous School: Destination: Reason for Leaving: | | Attendance Type: Current (Single registration) Other School: Not Specified FTE: 0.50 Part Time Attendance Pattern: <table border="1"> <thead> <tr> <th></th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> <th>Sun</th> </tr> </thead> <tbody> <tr> <td>am</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>pm</td> <td><input type="checkbox"/></td> </tr> </tbody> </table> | | | | Mon | Tue | Wed | Thu | Fri | Sat | Sun | am | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | pm | <input type="checkbox"/> |
| | Mon | Tue | Wed | Thu | Fri | Sat | Sun | | | | | | | | | | | | | | | | | | | | | | |
| am | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | |
| pm | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | | | | | | | | | | | | | | | | | | | | | |
| Boarder: <input type="checkbox"/> Boarder Type: Not Specified | | Terms in This School: Terms in Other School: Permanently Excluded: Designated Nursery: | | | | | | | | | | | | | | | | | | | | | | | | | | | |

- To activate the Part Time Attendance Pattern area, you must first edit the pupil's **FTE** field to *show less than "1.00"*
- Once you have edited the pupils FTE to the required value, press the **Tab** key on your keyboard. This will activate the Attendance Pattern area
- Click in the tick-boxes to specify when the pupil attends school (a tick in the box means the pupil attends that session)
- Click on **Save** to save your changes.

FTE: 0.8

Part Time Attendance Pattern:

| | Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|----|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| am | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| pm | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

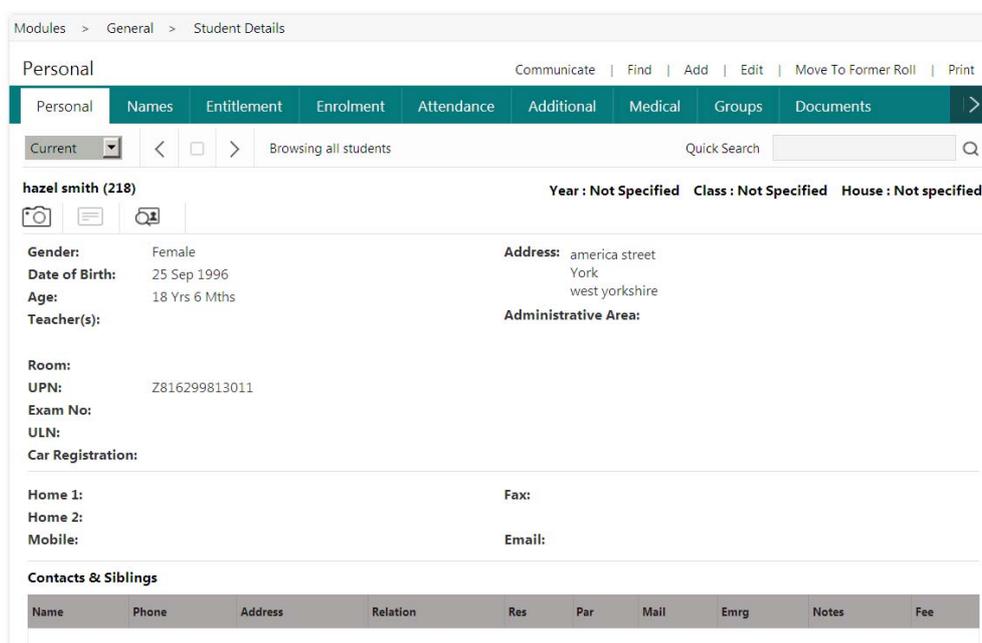
Using the Quick Search Function

Try viewing the details for Hazel Smith.



- Place your cursor in the **Quick Search** or tab to the field to activate it
- To search for the student Hazel Smith, enter the following:
- Press <Enter> or click onto the spyglass icon 

The Student Details screen for Hazel Smith is now displayed (unless there is more than one entry beginning with "Smit,H", in which case you will be given a matching list from which you can select the desired record).



The screenshot shows the 'Student Details' window for Hazel Smith. The window title is 'Modules > General > Student Details'. The main content area is titled 'Personal' and includes a navigation bar with tabs: Personal, Names, Entitlement, Enrolment, Attendance, Additional, Medical, Groups, and Documents. Below the navigation bar, there is a 'Current' dropdown menu, navigation arrows, and the text 'Browsing all students'. A 'Quick Search' field is visible. The student's name 'hazel smith (218)' is displayed, along with 'Year: Not Specified', 'Class: Not Specified', and 'House: Not specified'. The personal details section includes: Gender: Female; Date of Birth: 25 Sep 1996; Age: 18 Yrs 6 Mths; Address: america street, York, west yorkshire; Administrative Area: (blank); Room: (blank); UPN: Z816299813011; Exam No: (blank); ULN: (blank); Car Registration: (blank); Home 1: (blank); Home 2: (blank); Mobile: (blank); Fax: (blank); Email: (blank). At the bottom, there is a 'Contacts & Siblings' section with a table header: Name, Phone, Address, Relation, Res, Par, Mail, Emrg, Notes, Fee.

Now try using the **Quick Search** facility to locate Woody Allen using a variety of methods. Check the results for a number of different scenarios: by entering just the initials (e.g. "W,A"), or the first part of the surname (e.g. "All", by entering the whole surname (e.g. "Allen") and then finally by entering the whole surname suffixed with W (e.g. "Allen,W").

Using the Student Find Function

An alternate method of finding a student's record is by using the **Find** function located at the top right of the Student Details window.



This function is also widely used in other areas of IntegrisG2.

The screenshot displays the 'Student Find - General Search' interface. At the top, there are navigation links: 'Advanced Find', 'Clear Search Criteria', 'Load Saved Query', and 'Save Search Query'. Below this is a tabbed interface with 'General Searches' selected. The search criteria are organized into several sections: 1. Personal Information: Surname/Ref No, Known Name, First Name, Legal Surname, Contact Surname. 2. Demographics: Roll Status (Current), Year Group, Class, House, Gender, NC Year. 3. Global Name Search: A dropdown for 'All Names (Excluding History)', a date range selector for 'Date of Birth Between' and 'Student Age'. 4. Identification: UPN, Exam Number, ULN, Car Registration. 5. Grouping: Group Type, Group, Family Rep. 6. Assessment: Current Key Stage, Key Stage, Year of Assessment, End of Statutory Assessment, Assessed at Another School.

You can find a variety of different students and student groups using the **Find** function, including individuals, year groups, forms, teaching sets, birthdays, addresses and user defined information (UDI's) – practically any desired cohort of pupils can be brought together.

The system can also save any search criteria you enter for future use – this is called a **Query**. A query can be used at a later date to make future searches more efficient i.e. you don't have to specify the range of matching search fields all over again.



- Click on the **Find** hypertext
- On the **General Searches** tab, select **Year Group: 4**
- From the **Gender** drop-down list, select **Female**

- Click the **Find** button or press **<Enter>**

Modules > General > Student Details

Search Results Advanced Find | Print

| Reference | Surname | Known Name | Year | Class | Date of Birth |
|-----------|---------|------------|------|----------|---------------|
| 92 | Roddick | Anita | 4 | Class JW | 02 Apr 2006 |
| 5 | Windsor | Ellizabeth | 4 | 4G | 20 Aug 2006 |

Total Records Found: 2

[<< Back](#)

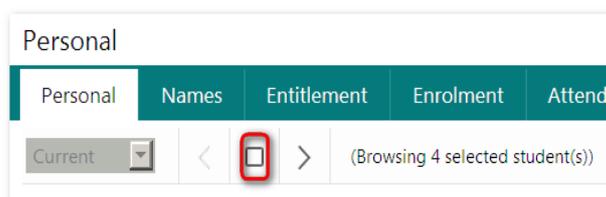
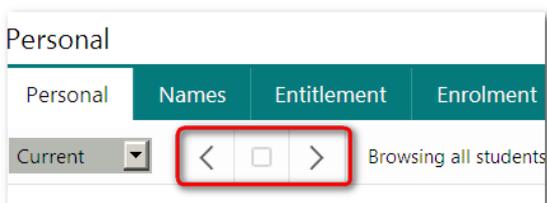
[Select](#) [Cancel](#)



Note: As Integris^{G2} is web based, it is no longer possible to use "Click & Drag" to select multiple lines in a list. You must now use the Windows standard "Control & Click" and "Shift & Click" selection methods.

The resulting list may be sorted by the various column headings - *Known Name, DOB, Surname, etc* - simply by clicking on the specific heading name.

- Click **Select** and **OK** to create a browse set of Year 4 girls (NB When choosing all students in the search results there is no need to highlight each line in turn)
- Scroll through the browse set  to view your selected students
- You will notice that once you are working with a Browse Set the text at the top of the Student Details window will change from *Browsing All Students* to *Browsing X Students* (with X being the number of students in your Browse Set)



- Click on  to clear the browse set and return to all students on the active roll.



Saving a Search Query in Student Find

- Load the *Year 4 Girls* through the Search screen by clicking **Find**
- Select *Year Group: 4* and *Gender: Female*
- Click the **Save Search Query** option from the top right corner of the window
- Give the query a relevant name e.g. 'Year 4 Girls'

- Click **Save Query**
- Click **Cancel** to close the window
- The query is now available for selection in the future



Note: There is no limit to the number of queries you can store in this area.

Loading a Saved Search Query in Student Find



- Click **Load Saved Query** to view a list of existing queries
- Highlight *Year 4 Girls* and select **Load Query**
- Click **Find**
- Click **Select** and **OK**
- Navigate through your browse set of students
- Clear the browse set using the 'stop' icon as before



Note: Any queries you save can be easily accessed in the Reports area, allowing you to run reports based on your saved queries.

Editing a Student Record

Once a student has been entered into Integris^{G2}, their details can be added to or edited at any time. To do this, find the relevant student and click on the **Edit** option. This will open the student's record for editing.

The following text details how to edit a student's record:

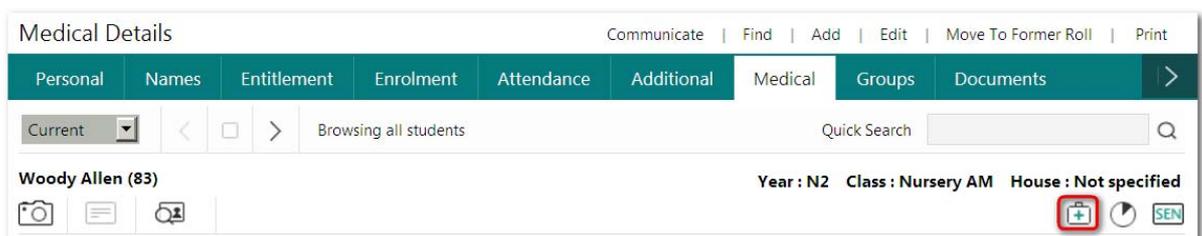
Activity 1: Adding Medical Details to existing students



- In Student Details use the **Quick Search** to find a pupil Woody Allen
- Click *Edit* 
- Select the **Medical Details** tab 
- Click onto the **Add** icon to insert a new condition
- Select **Asthma** from the *Medical Conditions* drop-down list
- In the *Emergency Procedure* field type in some valid text, e.g. *Donna carries Ventolin inhaler with her at all times.*
- Tick the **Medical Condition Flagged on Status Bar** tick box
- Click **OK**



- Whilst the Medical Details screen is still in Edit mode, you can also click in the *Permission to Call Doctor* and *Permission to Administer First Aid* tick boxes to flag these up (if the relevant permission has been given by the parent).



- If you activated the 'Medical Condition Flagged on Status Bar' tick box, when you save the changes a small first aid box will be displayed on the status bar to indicate the pupil has a medical condition you need to be aware of.

Activity 2: Allocating Students to a Group



- Find and select the **Groups** tab (hint: if the tab is not already visible click on the arrow  icon and then select *Groups* from the drop-down menu)
- Click on **Edit** (not required if you are already in *Edit* mode)
- Include Donna in the *Hockey* and *Camping Trip* groups
- Highlight both the *Hockey Team* and *Camping Trip* groups from the left pane and click 
- This will move them into the right pane i.e. the group membership area
- Click **Save**

Edit Student - Groups- Woody Allen

Personal Family Entitlement Enrolment Attendance Additional Medical **Groups** Movements >

Group Area: Student and Mixed Groups

Group Type: All Groups

Available Groups

- 2012/13 PPS
- 2013/14 Jan Starters
- 2013/14 Sept Returners
- All Y1-6 pupils in 2014/15**
- Class 3W Yr4
- Class JW Yr 3
- Class JW Yr3
- Easter Intake 2014
- EYFS SENCO
- EYFSP 2014
- EYFSP 2015
- Football Club
- Free School Meals
- FSM
- FSP January starters
- FSP September starters
- Key Stage 1
- Key Stage 1 2015
- Key Stage 2
- Key Stage 2 2015
- KS1 2014
- KS2 2014
- Mobile children
- Mrs Diddell
- Music

Group Membership

Member of...

- All EYFS pupils in 2013/14
- All pupils in 2011/12
- Art and Drama
- Choir
- EYFSP

Joining A Group
Click on single or multiple items in the 'Available' list and click on the 'Add' button

Add >>

Leaving A Group
Click on single or multiple items in the 'Member' list and click on the 'Remove' button

<< Remove

Activity 3: Adding a Student Activity Type



- Locate and click onto the **Activities** tab
- Click on **Edit**
- Click on the **Add** button  at the bottom right of the window
- Enter in the following details:

Activity Details

Date: 23 Apr 2015  **Type:** Not Specified 

Time: -

Description:

Details:

meeting regarding school work

Review:  Complete

[Recurrence](#)

- The system will default to today's date. Change this if required.
- Click **OK** – this will append the activity to the student record
- Click **Save**

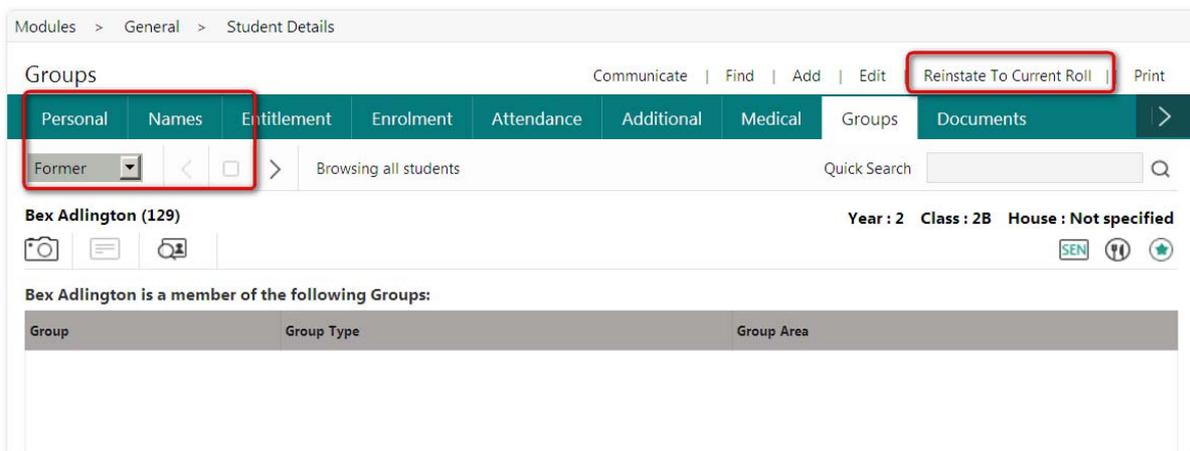
Moving a Pupil to the Former Roll

Pupil movements are increasingly common in the life of a school, not just when pupils reach their top year but also due to changes in family circumstances. Imagine, then, that Bex Adlington and her family have moved away from the area. Naturally, Bex will leave the school to attend another that is closer to her home, so ultimately you must move Bex from the Current Roll on to the Former Roll to reflect this.



- Find Bex Adlington
- Click on **Move to Former Roll** 
- Answer **Yes** to the confirmation message
- Insert today as the Leave Date
- Enter in the *Destination (which may need setting up as a parameter)* and *Reason for Leaving*
- Click **OK**
- The screen will still display Bex Adlington in Student Details, although notice that she has now been moved to the **Former** roll (see screenshot on the following page):

To extend the scenario, imagine that Bex subsequently decides that she wishes to return to her original school. To include Erica back into Student Details for the current roll:



Find Bex Adlington on the Former Roll



- Click on **Reinstate to Current Roll**
- Click **Yes** to the confirmation message
- Enter the *Entry Date* (the date when she actually arrives back in school) and the *Previous School* (this should already appear as a parameter)

Adding a Photo to a Pupil's Record

Many schools use photographs of pupils as an additional safety/security measure, and to facilitate this, Integris^{G2} allows you to enter a photo for each pupil. However, unlike Integris, the new system now holds a copy of the image within the data base itself.

To add a photograph of a pupil to their record, follow the steps below:



- Within Student Details, locate the pupil you wish to add a photo for
- Click on **Edit**
- Within the Personal tab, there is a *Photo* field and a *Browse* button located to the right
- Click on the **Browse** button to navigate to the required image

Edit Student - Personal - Woody Allen

Personal Family Entitlement Enrolment Attendance Additional Medical Groups Movements >

Surname: * Allen
 Legal Surname: * Allen
 Previous Surname: Smith
 First Name: * Woody
 Second Name:
 Third Name:
 Known Name: * Woody
 Sub-dwelling: 1 Eden Garden
 Dwelling: monkton
 Street:
 Locality:
 Town: York
 County:
 Postcode: YO23 7TP
 Country:
 Administrative Area:
 Reference: * 83
 UPN: G816299810003
 Temporary UPN:

Date of Birth: * 14 Jan 2011
 Birth Certificate Seen:
 Gender: * Male
 Photo: Browse...
 Home Telephone 1: 01234567896
 Home Telephone 2: 98765432100
 Mobile:
 Fax:
 Email:
 Car Registration:
 Family Representative:
 Year: N2
 NC Year: N2
 Class: Nursery AM
 House: Not specified
 ULN:

- You will now be taken into a standard Windows browser, where you should navigate through to the location of the photo you wish to download.
- Once you have located the required photo, double click the image or single click and then choose the **Open** button.
- This will put the download path into the Photo field.
- Click on **Save**
- When you next click on the camera icon on the student browse window, you will display the student's photo. 

Entering Key Stage Data

As with Integris, the new Integris^{G2} system will allow you to record Key Stage data for pupils. To enter Key Stage data:



- Locate the pupil you wish to enter the Key Stage data for.
- Click on **Edit** to open that pupil's record up for editing

Communicate | Find | Add | **Edit** | Move To Former Roll | Print

- Click on the  tab and then click on **Key Stage** from the resulting drop-down list.



You will now be taken into the Key Stage window where you can edit the data.

| Category | Sub-category | Value |
|---|---|-------|
| Communication and language: | Listening and attention | 2 |
| | Understanding | 3 |
| | Speaking | 2 |
| Physical Development: | Moving and handling | |
| | Health and self care | |
| Personal, social and emotional development: | Self-confidence and self-awareness | |
| | Managing feelings and behaviour | |
| | Making relationships | |
| Literacy: | Reading | 3 |
| | Writing | 3 |
| Mathematics: | Numbers | 2 |
| | Shape, space and measures | 2 |
| Understanding the world: | People and communities | 1 |
| | The world | A |
| | Technology | 1 |
| Expressive arts and design: | Exploring and using media and materials | 1 |
| | Being imaginative | 2 |

To enter/edit the data in this window, you can either....:



- Click on the arrow on the right hand side of the field you wish to edit
- Click on the required value from the resulting drop-down list
- This value will now be in the field.

- Click on **Save** to store your changes.

...or you can:

- Click into the field you wish to edit
- Type in the value you wish to enter
- Use the **Tab** key to move around the other fields and type in any required data
- Click on **Save** to store your changes.



Note: When you type values directly into the fields, if you try to enter a value that is not part of the lookup (i.e. not already in the pre-defined drop-down list), no change will be made. You may only enter levels that exist in the list.

Staff Details

The Staff Details section is similar to Student Details. The search functions and the display of information are also comparable, although there are additional fields that reflect the fact that you are working with staff members rather than pupils. A good example of this is the National Insurance Number field. This is a mandatory field that is not present in Student Details.

Modules > General > Staff Details

Personal Find | Add | Edit | Move to Former Roll | Print

Personal | Additional Info | Contacts | Groups | Activity | UDI | Qualifications | Training | Medical | Contracts >

Current < > Browsing all staff Quick Search

Mr AN Assessment (12) - Male Staff Code: TAA NI Number:

| | |
|----------------------------------|-----------------------------|
| Title: Mr | Address: |
| Initials: AN | Administrative Area: |
| Surname: Assessment | |
| Legal Surname: Assessment | |
| Previous Surname: | |
| First Name: AN | |
| Second Name: | |
| Third Name: | |
| Known Name: AN | |

| | |
|----------------|----------------|
| Home 1: | Fax: |
| Home 2: | E-mail: |
| Mobile: | |

| | |
|-----------------------------------|----------------------------------|
| Date of Birth: 11 Dec 1981 | Staff Type: Not Specified |
| Join Date: 21 Oct 2010 | Governor: No |
| Leave Date: | Governor Type: |
| Teacher (GTC) No.: | Governor Status: |
| LEA Identifier: | Governor Start Date: |
| | Governor End Date: |

SWF Census Category: Not Specified

Activity 1 – Enter a new staff member

Let's now enter details for a new member of staff. You can use your own details for this activity.



- Click on the **Add** option
- Within the Personal tab, enter in your details, especially the mandatory fields that have an asterisk '*' next to them
- Press the *Tab* key to move to the next field or use the mouse to navigate
- Click on the **Additional Info** tab
- Enter in some Personal details
- Enter your Car details
- Enter a Contact person and relevant details by clicking on the Add icon

| Other Contact Numbers | | | |
|-----------------------|--------|----------|-------|
| Type | Number | Location | Notes |
| | | | |

- Click **Save** to store the entries you have made.

Activity 2 – Edit staff details



Rich Reed is a classroom teacher and has had a change in personal details. Chris has moved home and now has the following address and telephone number:

Flat 15
Collingwood House
Donnelly Road
Langdale
Wessex
NR10 6RT

His new telephone number is 01235 876543

- Firstly, locate Chris Triggs using the FIND tool
- Click on the **Edit** icon
- Enter in Chris' new details
- **Save** the recorded changes

Activity 3 – Allocating an activity to a member of staff

A member of staff is going on an excursion with some students. Their activity needs to be recorded within the staff activity details.



- Click the **Find** button and select the member of staff
- Click on the **Edit** option 
- Click on the **Add** button on the left of the screen 
- Enter in the following details

| | |
|--------------------|---|
| Date | 12 April 2006 |
| Time | 8.30am – 3.00pm |
| Description | Museum excursion |
| Type | Excursion |
| Details | Visit to Science museum to reinforce student learning |

- Click **OK** to store the activity.

Admissions



As pupils arrive at school they need to be entered on to the data file. This may be achieved via a CTF (Common Transfer Format) import or directly through manual input, either to the Admissions or Current Roll. Entering pupils onto the system can be performed at any point during the school academic year but most commonly during the large intake periods of September and January.

In general, we would recommend that pupils be entered on to the Admissions Roll first and then 'promoted' to the Current Roll once you know for sure that they are actually joining the school. However, where a pupil's true joining status is already known then it is most practical to enter them directly on to the Current Roll.

To enter a new pupil on to the Admissions Roll:



- Click on the **Admin** sidebar option
- From the resulting menu underneath, click on the **Admissions Batch Entry** option.

This will take you into the following screen:

Modules > Administration > Admissions

Admissions Batch Entry Add Batch | Remove Batch | Print

Batch Name:

| Admission No | First Name | Surname | Gender | D.O.B | Year |
|--------------|------------|---------|--------|-------|------|
| | | | | | |

Admission No:

Surname:

First Name:

Known Name:

Gender:

Date of Birth:

Year Group:

+
⊗
⊗

<< Back

- If you already have any admissions batches set up, click on the **Batch Name:** drop-down arrow in the top left hand corner and select the batch you want to work with
- If you don't yet have any batches in operation (or you wish to create a new batch to work with), click on the **Add Batch** link in the top right-hand corner of the window
- Enter the name for your new batch in the resulting pop-up window and say **OK** to save
- At the bottom of the *Admissions Batch Entry* window you will see an area to enter some basic pupil details
- Click on the Pencil & Paper icon to add the pupil to the Admissions list
- Once you have finished adding pupils, click on the **Back** button to close out.

Admission No:

Surname:

First Name:

Known Name:

Gender:

Date of Birth:

Year Group:

+
⊗
⊗

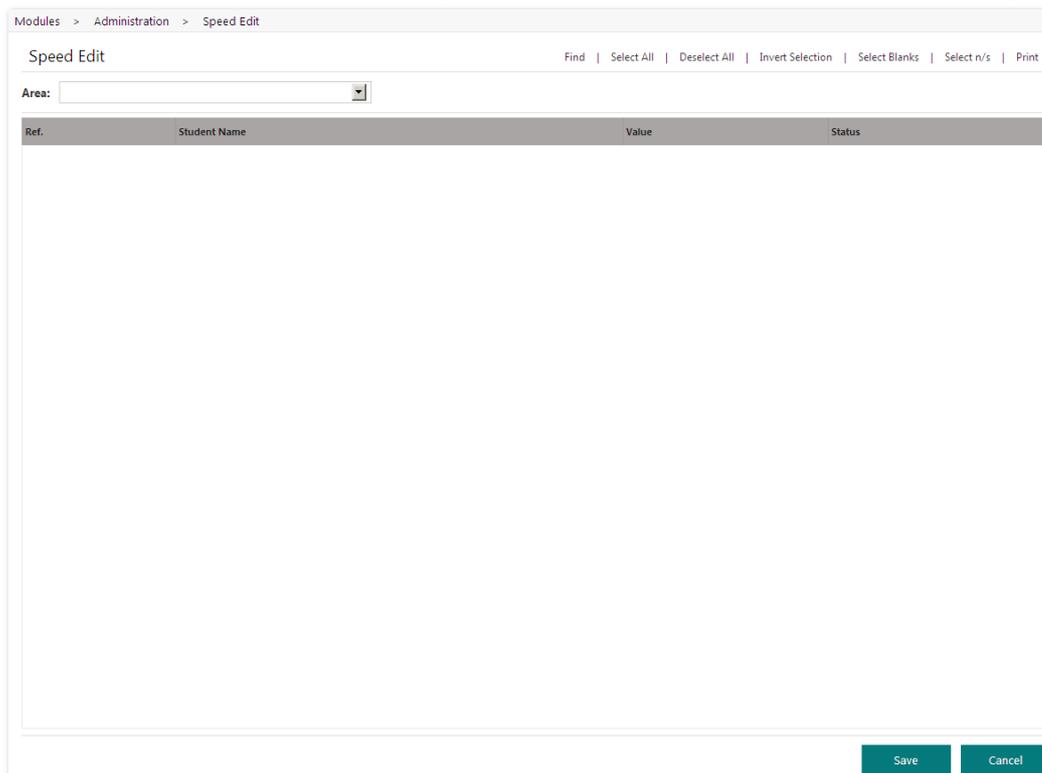
<< Back



Speed Edit

This function is very similar to the Speed Entry area found within Attendance. The aim is to allow for the fast entry of data for a selected group of students against a selected data field. A large number of the

data fields occurring on the system are available within Speed Edit, except those that would only hold one unique value per pupil e.g. UPN.



In the following example you will see how to speed edit the *Leave Date* field for a group of Year 6 pupils who are leaving your school.

In the *Area* drop down field, select **Leave Date**



- Click **Find** to locate the students to speed edit
- In the *Year Group* field select **Year 6**
- Click **Find** to bring up the list of matching students
- Click **Select** and **Yes** (to the message) to select all year 6 pupils
- Highlight several students in the Speed Edit window (tip: hold down the *Ctrl* key and left click on a target sample of students)

| Ref. | Student Name | Value | Status |
|------|-----------------------|-------------|--------|
| 25 | Austen, Jayne | | |
| 53 | Bond, James | | |
| 210 | Branston, Pickle | | |
| 22 | Bronte, Emily | | |
| 2 | Churchill, Winston | | |
| 80 | Clegg, Nick | | |
| 45 | Columbus, Christopher | | |
| 55 | Curie, Marie | | |
| 50 | Da Vinci, Leonardo | | |
| 214 | Smith, Mark | 31 Aug 2015 | |

- Select the required Leave Date in the *New Value* field
- Click 
- Click **Save** and **OK** to save modifications
- If the *Status* field still shows an **M**, this means that somebody else was editing the record at the same time as you, and your changes may not have saved down.



Note: As Integris^{G2} is web based, it is no longer possible to use “Click & Drag” to select multiple lines in a list. You must now use the Windows standard “Control & Click” and “Shift & Click” selection methods.

User Defined Information

The UDI - User Defined Information - area allows you to create fields so that any data you require – not already catered for on the system - can be collected and recorded. UDI's are used for storing any information specific to your school that does not already have a field in Student, Staff or School Details. First, the UDI definitions need to be created within Admin >UDI Definitions and then the UDI's can be viewed within Student, Staff or School details.

Creating New UDI's & Editing Existing UDI's



To create a *Front Door* UDI:



- Click on the **Admin** menu
- Select **UDI Definitions** from the bottom menu
- Select **Student UDI's** from the *Table Name* drop-down field
- Click **Add Definition** in the bottom right-hand corner

Table Name:

Description:

| # | Field Name | Field Type | Length | Description | Export | Central | Active |
|----|----------------------|---------------------|--------|------------------------------|--------|---------|--------|
| 1 | Dualregistered | Fixed Decimal Point | 1 | Dual Registered (No of Days) | | | |
| 2 | FD | Character | 32 | Front Door | | | ✓ |
| 3 | Nurserysessions | Fixed Decimal Point | 2 | No of Nursery Hours | | | |
| 4 | PermissionPhoto | Boolean | N/A | Permission for Press Photo | | | |
| 5 | Pmot | Lookup | N/A | Preferred Mode of Travel | | | |
| 6 | PupilP | Lookup | N/A | Pupil Premium | | | |
| 7 | RepresentationStatus | Lookup | N/A | School Representative | | | |
| 8 | Service Child | Boolean | N/A | SC RM | | | ✓ |
| 9 | Servicechild | Boolean | N/A | ServiceChild | | | ✓ |
| 10 | UDI | Character | 32 | UDI | | | ✓ |

- Enter in the following details:

Modules > Administration > UDI Definitions

Edit UDI Definition

Field Name: frontdoor

Field Type: Lookup Lookup Values

Length: N/A

Description: front door

Export:

Central:

Active:

- The Front Door UDI will be in the form of a list of Front Door which you can select from a drop-down menu. To populate that list, click on the **Lookup Values** button.

Modules > Administration > UDI Definitions

Lookup Items

Field Name : frontdoor

| Id | Lookup Name |
|----|--------------------------------|
| 1 | <input type="text" value="1"/> |
| 2 | <input type="text" value="2"/> |
| 3 | <input type="text" value="3"/> |

- Click on the **Add Item** button and enter the first required Front Door
- Click on the **Add Item** button to enter the *next* Front Door
- Continue with this process until all required Front Doors are entered
- Click **OK** to save the lookup values
- Make sure there is a tick in the **Active** tick box (this ensures the UDI is available for selection in other parts of the system)
- Click **OK** again to save the UDI definition

The Front Door UDI can now be seen on the list of Student UDI's.

UDI

Communicate | Find | Add | Edit | Move To Former Roll | Print

Personal Names Entitlement Enrolment Attendance Additional Medical Groups Documents Movements Teaching Sets UDI

Current < > Browsing all students Quick Search

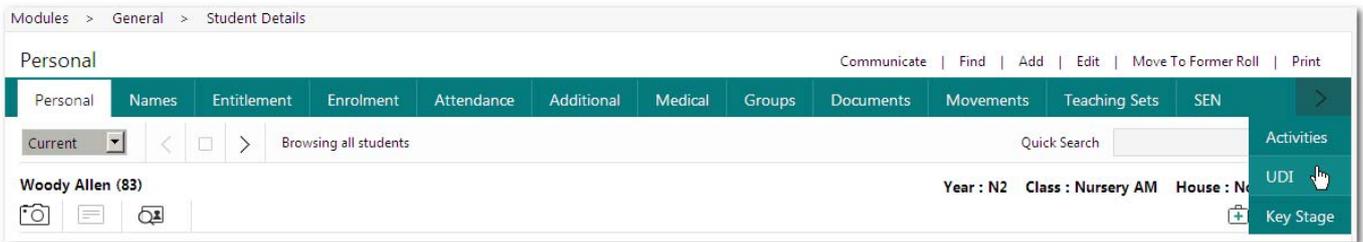
Woody Allen (83) Year : N2 Class : Nursery AM House : Not specified

| Description | Value |
|--------------|---------|
| Front Door | |
| front door | |
| SC RM | |
| ServiceChild | Yes |
| UDI | UDIRest |

Once a UDI has been created, go to Student, Staff or School details to enter information for the student, staff or school UDI.



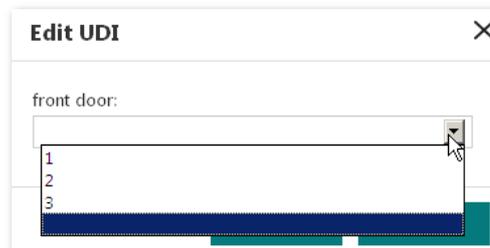
- Go into **Student Details**
- Find *Woody Allen*
- Select the **UDI** tab (you may have to click on the orange circle/white arrow to see the extra menus)



- Click **Edit**
- Highlight the row containing the description of **Shoe Size**
- Click on  (top right of screen) to edit the information



- Click on the drop-down list (containing your preset values) and choose the required shoe size.

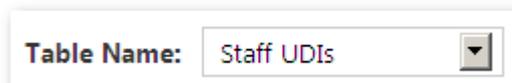


- Click on the **OK** button to store this change
- Click **Save**

Creating Staff UDI



- Select Staff UDI from the Table Name drop-down list



- Click **Add Definition**
- Enter the following Staff UDI

Edit UDI Definition

Field Name:

Field Type: Lookup Values

Length:

Description:

Export:

Central:

Active:

Entering Details of Staff UDI



- Select the **UDI** tab
- Click the **Edit** option
- Highlight the *School Parking* UDI for Alison Bailey
- Click onto the edit icon  on the top right of the screen
- Enter '14' for Elaine's parking bay number

Edit UDI ✕

Parking Bay #:

OK Cancel

- Click **OK**

Utilities

Within the Admin>>Utilities section are options for configuring administrative functions. The Administration Utility options are similar to those found in Integrus.

Assign Family Representatives – flags a student as being the one who, for example, is given newsletters on behalf of a family. One or more members of a sibling group may be flagged as Family Representatives, although it is anticipated that the marker will usually be attached to the eldest or youngest sibling enrolled at the school.

Import & Export - the process of importing and exporting a Common Transfer Format (CTF) file containing student information for another school or establishment. It requires a leaving date and destination during the export.

Current -> Former Roll – Students may be moved from the Current to the Former roll individually or in groups. If the students are leaving the school (for example, a family group) it is faster to use the *Current -> Former Roll* utility.

Please select the Administration Utility that you require from the list below:

Assign Family Representatives



- Select **Mark Youngest Sibling as Family Representatives**
- Select **Apply to ALL Students**
- Leave **Tracking ON**

- This utility will set the Family Representative indicator for students.
- Use the buttons below to set your preferences, then click on 'Start' to run the utility.

- Mark Eldest siblings as Family Representatives
- Mark Youngest siblings as Family Representatives

- Apply to ALL students (will overwrite existing flags)
- Apply ONLY to siblings with no Family Representatives (leaves existing flagged students and sibling groups unchanged)

When ON, Tracking will re-allocate the Family Representative for the sibling groups where an existing representative member of a group is moved from the Current Roll.

- Tracking ON
- Tracking OFF

- Click **Start** and **Yes**
- Click **OK**



Note: The tracking facility is used to ensure that once pupils leave school the responsibility for Family Representative is transferred over to

Exporting Student Data via CTF



Go to Modules > Admin > Imports and Exports > CTF Export

Please select the Import/Export Utility that you require from the list below:

CTF Export

CTF Import

Key Stage Exports

Pupil Premium Import

There are 2 options for exporting student information.

School to School Transfer - for Leavers

- This option is designed to export students who are leaving your school for another establishment.
- Students will be selected on the basis of their stored leaving date and destination. You should ensure that these items have been correctly set for the students concerned.
- The export will include Current and Former Roll students only.

General Transfer

- Students will be selected by use of the 'Find' tool.
- Typical use is for generation of update files for central (LA) systems or local subsidiary software used in your school.



- Select the **School to School Transfer – for Leavers**
- Click **Next**
- Select **Export Destination** for the required pupils
- Select the **Leave Date** for the required pupils
- Click **Refresh**

Export Wizard - Student Selection (School to School)

Export Destination: 816/2018 - Clifton Green Primary School

Leave Date: 02 May 2015

Export Students to: 816/2018 - Clifton Green Primary School **Leave Date:** 02 May 2015

| Ref | Last Name | Known Name | Year | Class | DOB | Gender | Roll |
|-----|-----------|------------|------|------------|----------|--------|------|
| 83 | Allen | Woody | N2 | Nursery AM | 14.01.11 | Male | C |

Refresh button.

- Click **Next**

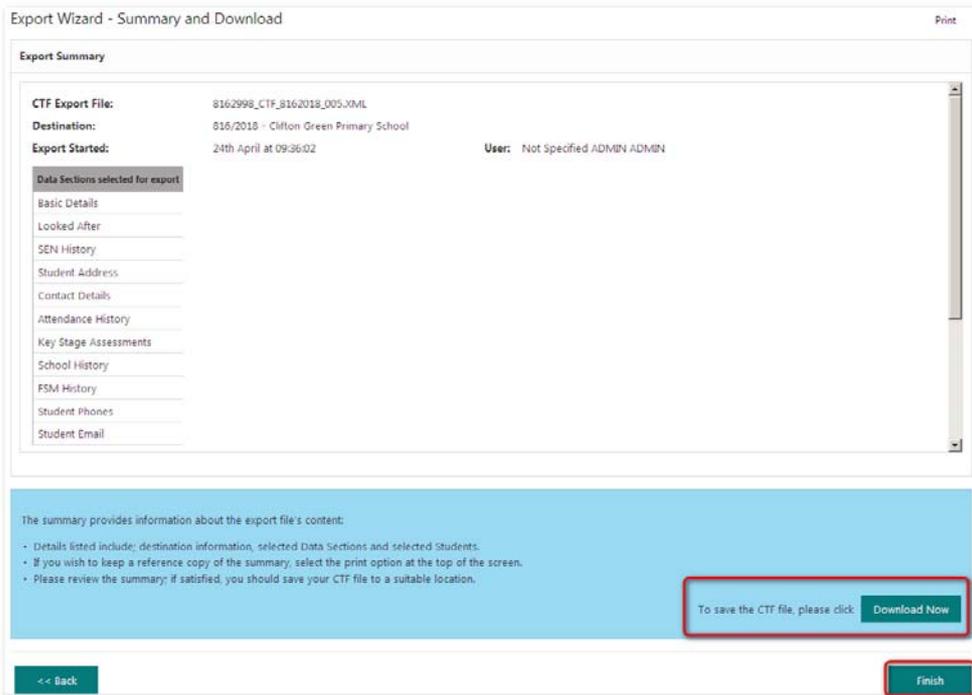
Export Destination: 816/2018 - Clifton Green Primary School

Number of Students: 1

• This table lists data sections that can be included in your CTF export file.
 • By default, the main data sections are selected for export.
 • You can modify export choices by use of the checkboxes, and top screen menu options.

| Available Data Sections | Include in Export |
|--------------------------------------|-------------------------------------|
| Basic Details | <input checked="" type="checkbox"/> |
| Looked After | <input checked="" type="checkbox"/> |
| SEN History | <input checked="" type="checkbox"/> |
| Student Address | <input checked="" type="checkbox"/> |
| Contact Details | <input checked="" type="checkbox"/> |
| Attendance History | <input checked="" type="checkbox"/> |
| Key Stage Assessments | <input checked="" type="checkbox"/> |
| Key Stage 1 Test Data (2005 onwards) | <input type="checkbox"/> |
| School History | <input checked="" type="checkbox"/> |
| FSM History | <input checked="" type="checkbox"/> |
| Student Phones | <input checked="" type="checkbox"/> |
| Student Email | <input checked="" type="checkbox"/> |
| Extended Contact Details | <input type="checkbox"/> |
| Extended Student Details | <input type="checkbox"/> |

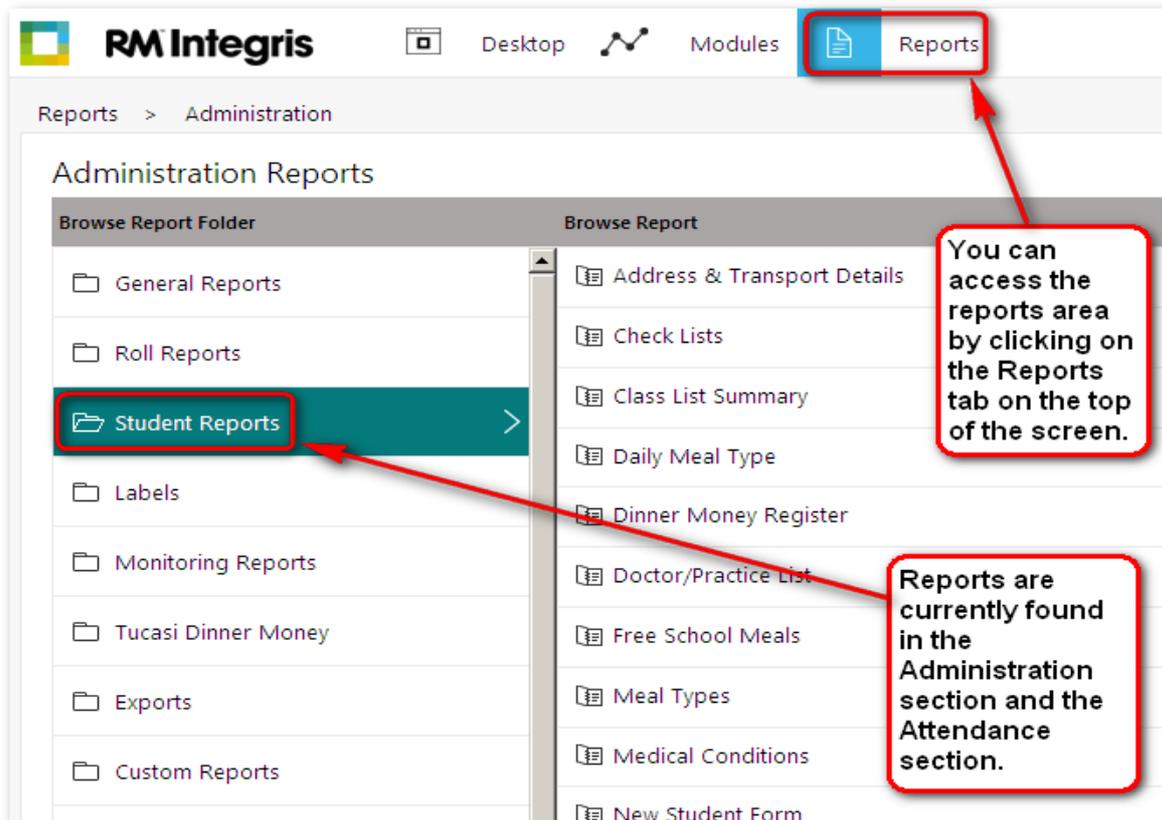
- Click on any tick box to include/exclude that area from the export
- Click **Next** again
- Click **Download Now**
- Select the **Save** option
- Save the CTF Export file to your desktop
- Click **Save**
- Click **Finish**



Reports

The Reports area of Integris^{G2} again retains much of the look, feel and functionality of Integris Reports, but there have also been many changes to enhance the way the area works. A good example is that *virtually all* reports can now be run using the *Student Find* function, which gives a huge amount of flexibility when running reports. It is also possible to apply some initial sorts to a report, and/or apply further filters and sorts to the report *once it is on screen*. In addition, we have consolidated a number of similar reports into a single report, whilst preserving the individual nature and appeal of each.

The reports print via Adobe Acrobat in PDF format (which can be easily downloaded during the reporting process) or can be taken into programs such as MS Excel with minimal mouse clicks.



Running a Report



In the following example, you will see how to run an Administration Report, apply filters to the report, print the report and take the report data into MS Excel.



- Click on the **Reports** tab at the top of the screen
- Click on **Administration** in the top menu list
- Click on **Roll Reports** to open up that section of the standard reports list
- Click on **Standard Student List** report
- You will see that there are three available **Options**:
 - *Show student reference number*
 - *Include tick boxes*
 - *Show family representative totals*
- Within the *Student Selection* tab, look at the various options available in the drop-down list. You can use these options to select the data in a format that is relevant to you (e.g. select by *Year Group/Student Find/Classes* etc.)
- From the **Select Students by** drop-down list select **By Year Group**
- In the *Student Selection* tab, click on the **Hand** icon on the right of the screen to select *all* Year Groups.
- Go to the **Sort** tab

Notice that *Year Group* has been added to the *Sort Field* area. This is representative of the selection from the *Student Selection* tab.

Also, the **Sub Total** and **Page Break** options are flagged by default. If you do not require the report to sub-total or you do not require any page breaks, simply remove the relevant tick.

Sub-Total – If, for example, you are running a report on a browse set of the whole school, and you apply the sub-total option to, say, Year Group, each Year Group will have a small sub-total at the bottom. *This can be removed to suit your requirements.*

Page Break – Continuing on with the above example, if you also flag the page break box, you will not only get a sub-total at the end of each Year Group, but each new Year Group will start printing on a new page. *Remove this tick if you want Year Groups to span pages.*



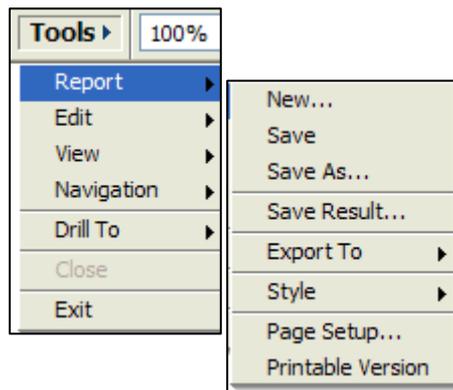
- Click 
- You will now see a screen report based on the students you have selected and any sorts/filters will be applied to the data
- There are various other options available once you are viewing the report on screen (detailed on the following page)
- Click  to close the report

Wessex Primary School
Standard Student List
Year Group: 1

| Name | DOB | Age | Gender | Reference No. |
|-------------------|-------------|---------------|--------|---------------|
| Archibold, Leeann | 18 Feb 2000 | 6 Yrs 1 Mth | F | 68 |
| Bandeer, Chantra | 02 Jun 2000 | 5 Yrs 10 Mths | F | 49 |
| Blair, David | 11 Nov 1999 | 6 Yrs 5 Mths | M | 67 |
| Bloggs, Joe | 01 Jan 2000 | 6 Yrs 3 Mths | M | 131 |
| Bridger, Stefan | 20 Aug 2000 | 5 Yrs 7 Mths | M | 65 |
| Calton, Georgina | 18 Aug 2000 | 5 Yrs 7 Mths | F | 21 |
| Davies, Rebecca | 28 May 2000 | 5 Yrs 10 Mths | F | 17 |
| Draper, Harry | 19 Sep 1999 | 6 Yrs 6 Mths | M | 75 |
| Draper, Simon | 08 Nov 1999 | 6 Yrs 5 Mths | M | 74 |
| Dyson, Harry | 15 Dec 1999 | 6 Yrs 3 Mths | M | 76 |
| Hall, Rebecca | 24 Nov 1999 | 6 Yrs 4 Mths | F | 70 |
| Hawley, Nicholas | 31 May 2000 | 5 Yrs 10 Mths | M | 20 |
| Jacques, Jenny | 15 Sep 1999 | 6 Yrs 6 Mths | F | 78 |

13 Students in Year Group 1

There are several buttons on the toolbar shown above that are extremely important to the Integris^{G2} reporting functionality. The main buttons are listed below, along with a brief description of their functionality.

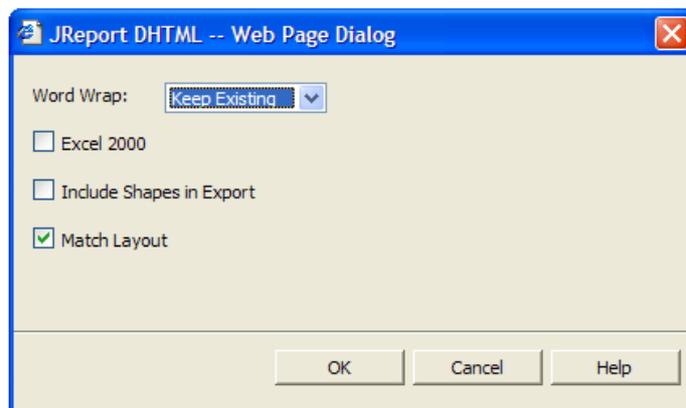


The TOOLS menu is probably the most important area within the reports screen. There are various functions available in here, including:

Tools>>Report>>Export To

This option allows you to generate your report to MS Excel (for example) quickly and easily. To do this:

- Click on **Tools>>Report>>Export To**
- Choose **Excel** from the resulting menu
- You will now see a window with further options (shown on next page):



- Make any relevant selections on this screen and then click on the **OK** button
- A window will be displayed asking if you would like to Open the file, Save it or Cancel.
- Choose **Open** to open the report directly into Excel

Microsoft Excel - Core_Stud_Stand_Student_List_NoLine51_Grp.xls [Read-Only]

File Edit View Insert Format Tools Data Window Help

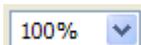
100%

Reply with Changes... End Review...

Arial 16 B I U

A1 Wessex Primary School

| | A | B | C | D | E | F | G | H |
|----|------------------------------------|-------------|---------------|---------------|----------------------|---|---|---|
| 1 | Wessex Primary School | | | | | |  | |
| 2 | Standard Student List | | | | | | | |
| 3 | Year Group: 1 | | | | | | | |
| 4 | | | | | | | | |
| 5 | Name | DOB | Age | Gender | Reference No. | | | |
| 6 | Archibold, Leeann | 18 Feb 2000 | 6 Yrs 1 Mth | F | 68 | | | |
| 7 | Bandeer, Chantra | 02 Jun 2000 | 5 Yrs 10 Mths | F | 49 | | | |
| 8 | Blair, David | 11 Nov 1999 | 6 Yrs 5 Mths | M | 67 | | | |
| 9 | Bloggs, Joe | 01 Jan 2000 | 6 Yrs 3 Mths | M | 131 | | | |
| 10 | Bridger, Stefan | 20 Aug 2000 | 5 Yrs 7 Mths | M | 65 | | | |
| 11 | Calton, Georgina | 18 Aug 2000 | 5 Yrs 7 Mths | F | 21 | | | |
| 12 | Davies, Rebecca | 28 May 2000 | 5 Yrs 10 Mths | F | 17 | | | |
| 13 | Draper, Harry | 19 Sep 1999 | 6 Yrs 6 Mths | M | 75 | | | |
| 14 | Draper, Simon | 08 Nov 1999 | 6 Yrs 5 Mths | M | 74 | | | |
| 15 | Dyson, Harry | 15 Dec 1999 | 6 Yrs 3 Mths | M | 76 | | | |
| 16 | Hall, Rebecca | 24 Nov 1999 | 6 Yrs 4 Mths | F | 70 | | | |
| 17 | Hawley, Nicholas | 31 May 2000 | 5 Yrs 10 Mths | M | 20 | | | |
| 18 | Jacques, Jenny | 15 Sep 1999 | 6 Yrs 6 Mths | F | 78 | | | |
| 19 | 13 Students in Year Group 1 | | | | | | | |



This field allows you to view the report in a smaller or larger scale. Simply click on the drop-down list and choose the required percentage value.



The options above allow you to scroll through each page of your report. In this example we ran a Standard Student List report for the whole school, with a Sort value of Year Group.

The "1 of 7" value shows which page you are currently viewing, and how many pages there are in the report.

The   arrows allow you to scroll through the report either at a page at a time or jump to the last page

The opposite facing arrows allow you to move backwards through the pages, again, one at a time or right back to the beginning.



The two icons shown above are the  **do**  **Redo** buttons, and work in the same way as any Windows standard Undo and Redo buttons.



The binoculars icon allows you to search through your report data to look for a specified value. For example, if you wish to find all the pupils with a specific Date of Birth, you would:

- Click on the **binoculars** icon
- You will now see the options screen below:

- Choose the required **Field** on which you wish to search (e.g. Date of Birth)
- Choose the initial **Value Range**
- If you would like to be more specific, click on the **Value** drop-down list and choose a specific Date of Birth
- Click on the **Next** button (after making any other relevant changes)

| Name | DOB | Age | Gender | Reference No. |
|-----------------|-------------|----------------|--------|---------------|
| Joyce, Julie | 07 Jun 1995 | 10 Yrs 10 Mths | F | 81 |
| Kelly, Samantha | 10 Feb 1995 | 11 Yrs 2 Mths | F | 79 |
| Kilner, Judy | 31 Jul 1995 | 10 Yrs 8 Mths | F | 32 |
| Lee, Ho | 11 Jul 1995 | 10 Yrs 9 Mths | M | 64 |
| Lee, Phillip | 15 Feb 1995 | 11 Yrs 1 Mth | M | 69 |
| Lees, Jackie | 23 Oct 1994 | 11 Yrs 5 Mths | F | 28 |

- Any pupils matching the specified data will be highlighted (as shown above)



The Sort button (shown above) allows you to sort your report data by any of the fields available in the report. To do this:

- Click on **Sort**
- You will now see the Sort options area at the top of the report window (see below)



- Click on the drop-down field and select the criterion on which you would like to sort
- Choose the **Ascending** or **Descending** radio button

- Once you have chosen a Sort field, you will see a small button appears to the right side of the Descending rad⁺ button. This button allows you to add an additional sort to the main sort (i.e. sort first by Gender and then by Date of Birth)
- Click on the **Apply** button to proceed with the sort
- Click on the **Reset** button to revert back to the original (pre-sort) data



The **Filter** button allows you to filter the report data. You may wish to only view the female pupils in your report; this can easily be done with the filter option.

To apply a filter of Females Only:

- Click on the **Filter** button (shown above)
- You will now see the **Filter Panel** at the top of the report screen

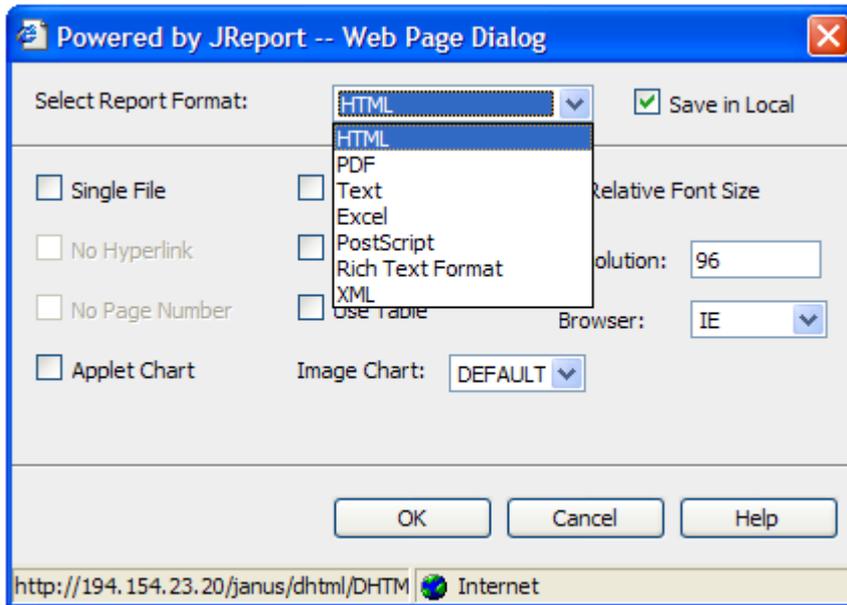
- Choose the fields you wish to sort on (you can see the example above shows a simple sort of **Gender = F**)
- If you wish to apply more than one filter, click on the **End** drop-down field and choose either "**And**" or "**Or**", as required. You will now be given a second line to apply your next choice of filter. You can add as many lines to the filter as you like (data fields permitting)
- Once you have chosen your filter fields, click on **Apply** to proceed with the filter
- You will now be looking at the filtered list
- Click on **Reset** to revert back to the original report data.



The disk icon allows you to save the report data as any one of a number of file types (i.e. HTML, Excel etc.).

To save a file:

- Click on the **disk** icon
- You will now see the following screen:

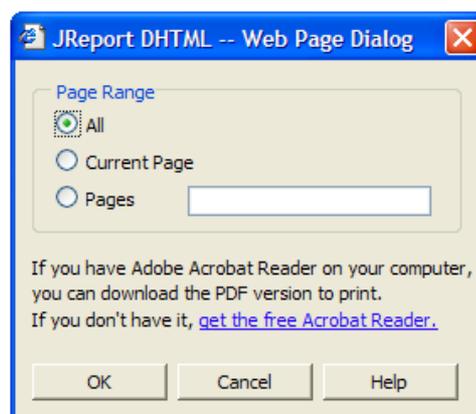


- Choose the required file type from the drop-down list at the top of the window
- Make any other required selections
- Click on the **OK** button to save the report as the required file type
- You will be offered the option to Open/Save/Cancel. Choose **Save**
- You will now be offered the standard save browser window. Choose the desired location for the file and click on **Save**
- Your file will now be available to open from your own PC

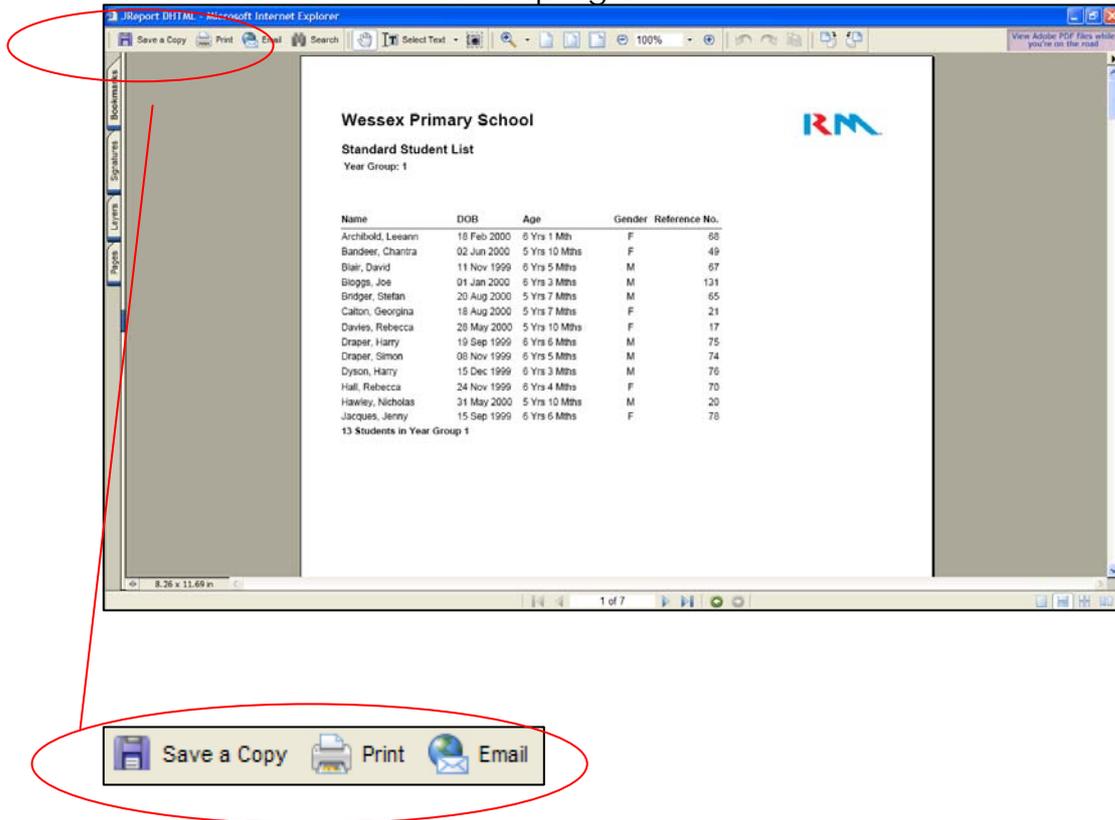
The **Print**  button allows you to produce a hard (paper) copy of your report via an Adobe Acrobat Reader PDF. This latest option allows you to utilise all the features of Adobe Acrobat Reader (as well as the Integris^{G2} sorts and JReports options listed above) to produce professional-looking reports.

To send your report to the Adobe Acrobat Reader:

- Click on the **Printer** icon (shown above)
- You will now see the initial JReport window. Note that there is a link for you to download the Adobe Acrobat Reader if you do not have this software already installed on your machine.
- If you need to install Adobe Acrobat Reader, click on the link and follow the on-screen instructions; otherwise make any required choices and click on the **OK** button



- Once you have clicked on **OK**, your report will open up into the Adobe Acrobat Reader program



- Once the report is displayed in the Adobe Acrobat Reader, you have a number of options available, but in this example we are looking to obtain a paper copy of the report
- To obtain a printed copy of your report, click on the **Print** button. You will be presented with a standard print window
- Make your selections and click on **Print** to finish the process.