

School Management System — User Manual

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1. Getting Started

1.1 Logging In

- Open your browser and navigate to your school's SMS URL (e.g., <https://yourschool.smsapp.com>).
- Enter your **Username** and **Password**.
- Click **Sign In**.

First Login: If this is your first login or your password has been reset, you will be redirected to the **Change Password** screen. You must set a new password before continuing.

1.2 Navigating the Application

The application uses a **sidebar menu** on the left to organize all features into sections:

Section	Description
Dashboard	Overview of key metrics and recent activity
Student Management	Admissions, registrations, active students, promotions
Academic	Classes, attendance, grade book, lesson plans
Staff	Instructors and disciplinary records
Communication	Notifications and SMS messages
Billing	Fee groups, fee components, student fees, payments
Reports	Student, academic, financial, and staff reports

Note: You will only see menu items for features you have permission to access. If a section is missing, contact your administrator.

1.3 Common Interface Patterns

- Index Pages** — List views with searchable, sortable tables (DataTables). Use the search box to filter.
 - Details Pages** — Click the eye icon or a record name to view full details.
 - Create** — Click the **+ Add** button (usually top-right) to open a creation form or modal.
 - Edit** — Click the pencil icon on a record to modify it.
 - Delete** — Click the trash icon. A confirmation dialog will appear before deletion.
 - Stats Cards** — Summary cards at the top of index pages showing key totals.
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2. Dashboard

The **Dashboard** (Home > Overview) provides an at-a-glance summary of your school's data:

- **Total Students** — Count of currently active students.
 - **Total Classes** — Number of classes configured.
 - **Attendance Rate** — Recent attendance percentage.
 - **Fee Collection** — Summary of recent payments.
 - **Recent Activity** — Timeline of recent actions in the system.
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3. Student Management

3.1 Student Admissions

Path: Student Management > Student Admissions

This is where the student lifecycle begins. Each student starts as an admission application.

Viewing Admissions

- The index page displays all admissions in a paginated table.
- Columns include: Admission Number, Student Name, Class, Status, and Date.
- Use the search bar to filter by name or admission number.

Creating a New Admission

1. Click **+ New Admission**.
2. Fill in the required student information:
 - **Personal Details** — Full name, date of birth, gender, nationality, religion.
 - **Contact Information** — Address, phone, email.
 - **Academic Info** — Desired class, term.
3. Click **Submit**. An admission number (e.g., ADM-000001) is automatically generated.

Admission Details (Multi-Step View)

Click on any admission to view its full details. The detail page has multiple steps/tabs:

Step	Description
Personal Info	Student's biographical information
Educational History	Previous schools attended
Guardian Information	Parent/guardian contact details
Skills & Languages	Student's skills and language proficiencies

Adding Educational History

1. From the admission detail page, click **Add Educational History**.
2. Enter the previous school name, years attended, and reason for leaving.
3. Click **Save**.

Adding Guardian Information

1. From the admission detail page, click **Add Guardian**.
 2. Enter guardian name, relationship, phone number, occupation, and address.
 3. Click **Save**.
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3.2 Student Registrations

Path: Student Management > Student Registrations

Once a student is admitted, they must be **registered** for a specific academic term.

Viewing Registrations

- The index page lists all registrations. You can filter by admission.
- Columns: Registration Number, Student Name, Term, Status, Date.

Creating a Registration

1. Click **+ New Registration**.
2. Select the **Admission** record and the **Term**.
3. Click **Submit**. A registration number (e.g., REG-000001) is generated.

Syncing to Active Student

Once registered, click **Sync to Student** to migrate the registration into an active student record. This:

- Creates a Student record with a student number (e.g., JD-000001).
- Links the student to their class and term.
- Runs as a background process — you'll see a confirmation once complete.

3.3 Students

Path: Student Management > Students

View and manage all active students in the system.

Student List

- Paginated, searchable table of all active students.
- Columns: Student Number, Full Name, Class, Gender, Status.

Student Details (Multi-Step View)

Click on a student to see their complete profile:

Tab	Content
Profile	Personal information, photo, contact details
Class History	Record of class assignments and changes
Guardian Info	Linked guardians with contact details
Fees	Fee records and payment history
Marks	Academic performance and grade history

3.4 Promotions

Path: Student Management > Promotions

Promote students from one class to the next at the end of a term or academic year.

Creating a Promotion Batch

1. Click **+ New Promotion**.
2. Select the **Source Class** (current) and **Destination Class** (promoted to).
3. Select the **Term**.
4. Click **Create**.

Selecting Students

1. Open the promotion batch and click **Select Students**.
2. Check the students to promote from the list.
3. Click **Save Promotion** to apply.

Reversing a Promotion

If a promotion was made in error:

1. Open the promotion batch.
2. Click **Reverse Promotion**.
3. Enter a reason for reversal.
4. Click **Confirm**. Students are moved back to their original class.

Deleting Draft Promotions

Promotions in **Draft** status can be deleted before they are finalized.

4. Academics

4.1 Classes

Path: Academic > Classes

Manage school classes (e.g., Class 1, Class 2, JHS 1).

Class List

- View all classes with student count and status.
- Stats cards show total classes and total enrolled students.

Creating a Class

1. Click **+ Add Class**.
2. Enter the class name, code, and capacity.
3. Optionally assign a fee group.
4. Click **Create**.

Class Details

- View the full student roster assigned to the class.
 - See fee group assignments.
 - Edit or delete the class from the detail view.
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4.2 Attendance

Path: Academic > Attendance

Record and track daily student attendance.

Recording Attendance

1. Click **+ New Attendance**.
2. Select the **Class** and **Date**.
3. The system loads all students in the selected class.
4. Mark each student as **Present**, **Absent**, **Late**, or **Excused**.
5. Click **Save**.

Viewing Attendance Records

- The index page shows attendance records by date and class.
 - Click on a record to see per-student attendance details.
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4.3 Grade Book (Student Marks)

Path: Academic > Grade Book

Enter and manage student academic grades and assessments.

Mark Types

Before entering marks, configure the types of assessments:

1. Click **Mark Types** to view existing types.
2. Create new types (e.g., Quiz, Test, Midterm, Final Exam) with weight percentages.

Entering Marks

1. Click **+ New Mark Sheet**.
2. Select the **Class** — students are loaded automatically.
3. Enter scores for each student per subject.
4. Click **Save**.

Viewing Mark Sheets

- The index lists all mark entry sessions.
 - Click on a sheet to view or edit individual scores.
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4.4 Lesson Plans

Path: Academic > Lesson Plans

Create and manage lesson notes for classes.

Creating a Lesson Note

1. Click **+ New Lesson Note**.
2. Fill in: Subject, Class, Topic, Date, Objectives, Content, and Activities.
3. Click **Create**.

Managing Lesson Notes

- View all lesson plans in the index.
 - Edit or delete existing notes.
 - Click on a note to view full details including content and objectives.
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4.5 Exam Categories

Path: Academic > Exam Categories

Define the types of exams your school administers.

- Create categories like: End of Term, Midterm, Weekly Test, Pop Quiz.
 - Each category can be referenced when entering student marks.
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4.6 Courses & Subjects

Path: Academic > Courses / Subjects

- **Courses** — Define course programs (e.g., General Science, Business).
 - **Subjects** — Define individual subjects (e.g., Mathematics, English, Science).
 - Courses can be mapped to classes, and subjects mapped to courses.
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4.7 Terms

Path: Academic > Terms

Manage academic terms/semesters.

- Create terms with start and end dates.
 - Terms are referenced throughout the system (registrations, billing, reports).
 - Mark a term as **Active** to set it as the current operating term.
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5. Staff & Discipline

5.1 Instructors

Path: Staff > Instructors

Manage your school's teaching staff.

Instructor List

- View all instructors with their status, assigned classes, and subjects.

Adding an Instructor

1. Click **+ New Instructor**.
2. Fill in: Full Name, Employee ID, Gender, Phone, Email, Qualification, Position.
3. Click **Create**.

Instructor Details

The detail page shows:

- **Profile** — Personal and employment details.
- **Class Assignments** — Which classes the instructor teaches.
- **Subject Assignments** — Which subjects they handle.
- **Certificates** — Professional certifications on file.

Managing Assignments

- **Add Class** — Assign the instructor to teach a class.
- **Add Subject** — Assign a subject to the instructor.
- **Add Certificate** — Upload certification records.
- **Set Resignation Date** — Record if the instructor has resigned.

5.2 Disciplinary Issues

Path: Staff > Discipline

Track and manage student disciplinary incidents.

Creating a Disciplinary Record

1. Click **+ New Issue**.
2. Select the **Student**, **Incident Type**, and **Date**.
3. Enter a **Description** of the incident and any **Action Taken**.
4. Click **Create**.

Managing Records

- View all discipline records with filters by class and date range.
 - Edit or delete records as needed.
 - Each record links back to the student's profile.
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6. Billing & Fees

6.1 Fee Components

Path: Billing > Fee Components

Fee components are the individual items that make up a fee (e.g., Tuition, Books, Uniforms, Lunch).

- **Create** components with a name and description.
- Components are reusable across multiple fee groups.

6.2 Fee Groups

Path: Billing > Fee Groups

Fee groups bundle fee components together with specific amounts. There are five types:

Type	Code	Description
Admission	1	One-time fees charged at admission
Terminal	2	Fees charged each term
Monthly	3	Recurring monthly fees
Weekly	4	Recurring weekly fees
Daily	5	Daily fees

Creating a Fee Group

1. Click **+ Add Fee Group**.
2. Enter the **Code** (up to 20 characters), **Description**, **Type**, and **Status**.
3. Click **Create**.

Adding Fees to a Group

1. Open the fee group details.
2. Click **Add Fee**.
3. Select a **Fee Component** and enter the **Amount**.
4. Click **Save**.

The index page shows each group's **Total Amount** (sum of all fees in the group).

Duplicating a Fee Group

Click **Duplicate** on any fee group to create a copy — useful when setting up similar fee structures for different terms.

6.3 Class Fee Groups

Path: Billing > Class Fee Groups

Assign fee groups to classes. Each class can have up to five fee group assignments:

- **Admission Fee Group** (required)
- **Terminal Fee Group** (required)
- **Monthly Fee Group** (optional)
- **Weekly Fee Group** (optional)
- **Daily Fee Group** (optional)

This determines what fees students in each class are billed.

6.4 Class Fees

Path: Billing > Class Fees

Link individual classes to specific fee groups and admission groups. This is the bridge between a class and its fee structure.

- Select a **Class**, **Fee Group**, and **Admission Group**.
- The system prevents duplicate combinations (same class + fee group).

6.5 Student Fees

Path: Billing > Student Fees

View fee records assigned to individual students.

- The index shows all students with their fee totals and outstanding balances.
- Click on a student to see a breakdown of individual fee items and payment status.

6.6 Student Payments

Path: Billing > Payments

Record and track student fee payments.

Recording a Payment

1. Click **+ New Payment**.
2. Search for the student using the search bar.
3. Select the outstanding fee(s) to pay against.
4. Enter the **Amount** and **Payment Mode** (Cash, Bank Transfer, Mobile Money, etc.).
5. Click **Submit**.

Payment Receipt

After recording a payment, click **Receipt** to generate a printable payment receipt/invoice.

6.7 Billing Cycles

Path: Billing > Billings

Manage billing cycles that group student fee records for a term or period.

- Create billing cycles with a name, term, and date range.
- Billing cycles help organize when fees are generated and tracked.

6.8 Student Subscriptions

Path: Billing > Subscriptions

Manage recurring subscriptions (e.g., SMS notification services). Create, edit, or cancel student subscriptions.

7. Reports

Path: Reports

The reports module provides data analytics with PDF export capabilities.

7.1 Student Reports

Report	Description	Filters
Student Enrollment	Student count by class and status	Class, Term, Status
Student Class List	Roster of students in a class	Class
Student Demographics	Breakdown by gender, nationality	Class, Gender, Nationality

7.2 Academic Reports

Report	Description	Filters
Attendance Summary	Attendance statistics by class	Class, Date Range
Student Performance	Individual marks and grades	Class, Term, Subject
Class Performance Summary	Class-wide average scores	Term

7.3 Financial Reports

Report	Description	Filters
Fee Collection	Payment records and totals	Date Range, Payment Mode
Outstanding Fees	Unpaid/arrears balances	Class, Term
Fee Group Summary	Breakdown by fee group	Fee Group, Term

7.4 Staff Reports

Report	Description	Filters
Instructor List	Staff roster with status	Status
Instructor Workload	Class/subject load per instructor	—
Disciplinary Issues	Discipline records summary	Class, Date Range

7.5 Exporting Reports

All reports support **PDF export**:

1. Open any report and apply your desired filters.
2. Click the **Export PDF** button.
3. The PDF downloads automatically to your browser.

Note: PDF export requires the reports.export permission. Contact your admin if the button is not visible.

8. Communication

8.1 Notifications

Path: Communication > Notifications

View system-generated notifications and messages.

- Notifications are generated automatically for key events (e.g., payment received, student registered).
- Click on a notification to read its full details.

8.2 SMS Pending Queue

SMS messages waiting to be sent are displayed here. This section is read-only and shows the processing status of outbound messages.

9. Your Account

9.1 Changing Your Password

1. Click your profile name/avatar in the top-right corner.
2. Select **Change Password**.
3. Enter your **Current Password**, **New Password**, and **Confirm New Password**.
4. Click **Update Password**.

Password Requirements:

- Minimum length as set by your administrator.
- Must differ from your current password.

9.2 Session & Security

- Your session remains active for **8 hours** of inactivity (sliding expiration).
- After 8 hours of no activity, you will be redirected to the login page.
- Always **Log Out** when using a shared computer.

9.3 Access Denied

If you see an **Access Denied** page, it means you don't have the required permission for that feature. Contact your system administrator to request access.

10. Frequently Asked Questions

Q: I can't see certain menu items. What's wrong? A: Your user account doesn't have the required permissions. Contact your administrator to have the appropriate role/permissions assigned.

Q: How do I find a specific student? A: Use the search bar on the Students index page. You can search by student number, first name, or last name.

Q: Can I undo a student promotion? A: Yes. Open the promotion batch in Student Management > Promotions and click **Reverse Promotion**. Enter a reason and confirm.

Q: Why can't I export a report to PDF? A: You need the `reports.export` permission. Contact your administrator.

Q: How are student numbers generated? A: Student numbers use the format {FirstInitial}{LastInitial}-{Sequence} (e.g., JD-000001). They are auto-generated when a registration is synced to a student record.

Q: How are admission numbers generated? A: Admission numbers follow the format ADM-{Sequence} (e.g., ADM-000001). They are assigned automatically when a new admission is created.

Q: What fee group types are available? A: There are five types: Admission (one-time), Terminal (per-term), Monthly, Weekly, and Daily.

Q: How do I record a partial payment? A: When recording a payment, simply enter the partial amount. The remaining balance will show as outstanding in the student's fee records.

Q: My session expired. Will I lose my work? A: Unsaved form data may be lost. The system uses an 8-hour sliding expiration — any activity resets the timer. Save your work frequently.